IRIS OpenSpace
Getting Started Guide
Version 1.2

Contents

Dear Customer,

Welcome to your guide for setting up, configuring and using IRIS OpenSpace.

IRIS OpenSpace is an online collaboration tool allowing you to share documents with your clients. You are able to publish documents to the IRIS OpenSpace online portal and your clients are then able to log into IRIS OpenSpace to view and/or approve the reports.

You can also capture client enquiries through OpenSpace, as well as adding a log in screen to your website to enable your clients to access your OpenSpace portal from your website.

IRIS OpenSpace can incorporate your branding, colours and logos both online and in all communications; this provides a fully branded portal to your clients where they can safely and securely exchange their confidential information with you.

- Upload, store and approve documents online
- Reports can be accessed anywhere an internet connection is available
- Quick and easy to setup with no software to install
- Increases efficiency
- Reduces carbon footprint demonstrating an environmentally friendly solution
- Reduces distribution costs including printing, postage and processing
- Fully secure – only you and your client can view documents
- Allows clients immediate 24/7 access to report information
- Unlimited electronic approvals
- Claim 1GB storage free (by entering your Customer Reference – contact Sales/Support for this)
- Easy access to E-Approvals and E-Checklist

Find further guides and information on the IRIS Support website

- Guides for configuring your software, including KashFlow Management Reports and Enquiry Forms
- Rebranding IRIS OpenSpace to match your companies look and feel

More information can be found at http://www.iris.co.uk/support/iris-openspace-support

Get started in IRIS OpenSpace

Setting up an Administrator account

1. Go to **www.irisopenspace.co.uk**
2. Click on **Need an account?**
3. Enter the required details. Make sure you enter your Customer Reference to claim your 1GB of free storage
4. Click **Create**. An activation email will be sent to the **New Administrator - Email Address**
5. Click the link in the email to be taken back to the IRIS OpenSpace website
6. Enter a **Password** and click **Set Password**

Create a new account

Complete the form below to create a new account for your accountancy practice or payroll bureau, please do not use this form if you are a client of an accountant or bureau.

- To activate your free space please enter your customer reference number and postcode
- To complete the registration a confirmation email will be sent to your email address with an activation link

Note: If you do not have a reference number, complete the registration form and check the box below to submit your details.

New Organisation Details

Organisation Name	*
Customer Reference	
Postcode	*
Telephone	*

☐ I do not have a customer reference number and would like to be contacted to get 1GB of storage for free

New Administrator

Email Address	*
Confirm Email Address	*
Forename	*
Surname	*

☐ I have read and agree to the terms and conditions

* required

Create   Cancel

Activating your Free Space

There are two methods to claim your free 1GB of space.

1. Enter your Customer Reference when creating a new account.
2. From the **Settings** menu, click **Practice Details,** click **Edit** and enter your Customer Reference number. Then click **Updat**

Your customer reference number can be found on your licence documents

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Email confirmation

If you do not receive the email conformation

1. Check your spam folder.
2. Go to the IRIS OpenSpace website and click '**Forgot your Password'?**
3. Enter your email address and click '**Reset'.**
4. An **Activation Request** email will be resent.

Adding and managing additional users to account

You can create additional users allowing access to the IRIS OpenSpace website, this is different from a client

A **Client** can only see files uploaded to the client space

A **User** can have access to multiple clients

1. Click the **Settings** tab
2. From the **Users** menu click on **New User**
3. Enter the **Email address, First Name** and **Surname**
4. Select **Is Admin User** to grant the user unrestricted access to the Settings and Subscription tabs.

> If you select **Is Admin User** the user will have the same access levels as the account administrator.

Use the form below to create a new account.
Create an Account

Email address	user@mypractice.com
First Name	First Name
Surname	Surname
Is Admin User	☐
Receive notifications from all clients	☐

Register **Cancel**

The user will receive an **Activate Your IRIS OpenSpace Account** email.

Click the link in the email to be taken back to the IRIS OpenSpace website. Enter a **Password** and click **Set Password**

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Notifications

Additional users can receive notifications on the following;

1.   All Clients
2.   Documents that they request approval for
3.   E-checklists that they upload

You can also select which clients a particular user receives notifications for on the 'User' screen. This will show a list of all clients. Using the checkboxes to the left of each client, select which client is attached to this user.

Once you have entered your preferences for the user, select 'Update' in the bottom right hand corner of the screen.

Home	Settings	Subscription

Users	Practice Details	Customisation	Audit Log	e-Approval Logs	e-Checklist Logs

UPDATE STAFF MEMBER

Use the form below to edit account.

Email address	tom.hext@test.co.uk	Receive notifications from all clients ☐ ⓘ
First Name	Tom	Receive notifications for approvals I request ☐
Surname	Hext	Receive notifications for e-checklists I upload ☐

Note: If you choose to change your e-mail address, you will be logged out and will have to log in using the new address entered.

STAFF MEMBER RECEIVES NOTIFICATIONS FROM:

Enter Client Name or ID	● All Clients	○ My Clients	○ Not My Clients

☐	Client ID	Client Name ▲	Status
☐	1	Rename Test	Active

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If you change a user's email address, they will be logged out and asked to log in again with the new email address

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Adding a Client

From the **Home** tab click **Clients,** then **+ New Client**, enter the client details and click **Create**

Select/de Select **Notify Client** to send an automatic email to the client when new files are uploaded.

> You must enter a unique **Client ID** to use IRIS OpenSpace with IRIS Payroll

New Client

Create a new client and optionally a user and their login details(this can be also done later).
An email will be sent to them to continue setup of their account if you to decide to create them now and to notify them

Client

Client Name	Company Ltd	
Client ID	5	
Notify Client	☑	

User (Optional)

Email	email@companyemail.cor
Confirm Email	email@companyemail.cor
Contact Forename	John
Contact Surname	Doe

Create **Cancel**

Once you have received the message **New Client Created** your clients can then setup their IRIS OpenSpace account.

New Client created

Your client (Company Ltd / **5**) has been emailed a unique link that will confirm and enable their account.
Please advise your client to watch out for the email and to respond to it as soon as possible.

Client Name: Company Ltd
Client ID: 5

Initial User
First Name: John
Last Name: Doe
Email: email@companyemail.com
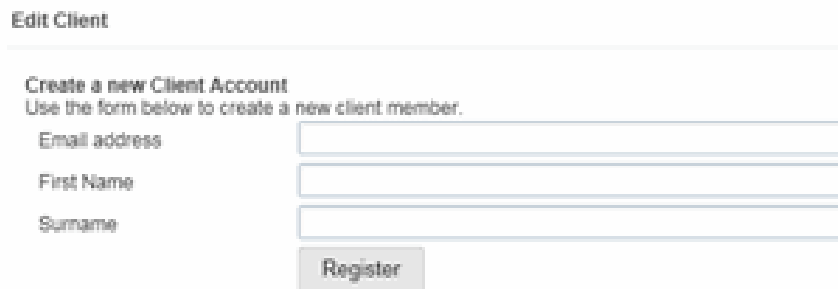
Your client will be using your default file structure

Your clients

Creating an IRIS Accountancy Suite client

To create an IRIS Accountancy Suite client in IRIS OpenSpace you do NOT need to select **New Client**. If you upload your first document for the client from IRIS the client will automatically be created in IRIS OpenSpace.

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The Status of the new client will show as '**Not Registered**' once you've uploaded your first document from IRIS.

A client user will be automatically created if there is an email address present in the IRIS Accountancy Suite database, if an email address is not present you can manually add the client user to the client in IRIS OpenSpace by selecting the Clients tab, Select the new client, Edit Client, Add Client User, Enter clients name and email address, Register.

Once you have received the '**Success!**' message the users can then setup their IRIS OpenSpace password. The steps for this are the same for creating a non-IRIS client, please see the **Client activation steps** below.

Enquiry Forms

You can now embed an OpenSpace Enquiry Form into your website to capture enquiries from potential clients. For further information on Enquiry Forms, please see additional guide entitled 'Enquiry Forms'

Client activation steps

Your client will then receive an email entitled **IRIS OpenSpace Client Registration**. To activate their account they will need to click on the link in the email and create a password (see screenshot below):

The link will take them to a page where they can setup a password for their IRIS OpenSpace account.

The client will then see a message confirming the account has been setup along with a button **login to IRIS OpenSpace**. This will take them to www.irisopenspce.co.uk. They will also receive an email entitled **Welcome to OpenSpace** (see example below). They are now ready to log in to IRIS OpenSpace and view any documents you have uploaded.

Adding multiple users to a client

An IRIS OpenSpace client can be accessed by multiple users. If you create a client and upload documents to the client either manually or from IRIS Accountancy Suite or IRIS Payroll, any IRIS OpenSpace any users under the **Add Client User** will be able to view the accounts when they login to their IRIS OpenSpace account.

Within the **Home** tab, click the **'Clients'** menu item and select the client you wish to add a user to.

Click **'Edit Client'** then click **'Add Client User'.** Enter the **Email Address, Confirm Email, First Name** and **Surname** then click **'Register'** when complete.

Creating multiple clients with the same email

You are able to create clients and attach them to an email address you have already used for another client. When they login to their IRIS OpenSpace account they will be able to see multiple documents.

Client Statuses

Not Registered	The client has been created automatically by uploaded file from IRIS Accountancy Suite, you will need to complete the user details
Registration Sent	An activation email has been sent to the client. We are waiting for client user to activate their account and setup a password

Inactive	The client user has activated their account, created a password but not logged in yet.
Active	The client has logged in.

Client Interface

When a client logs in to their OpenSpace account they can:

- Download and Upload files to and from the Practice
- **Notify** the practice a file has been uploaded
- See who is able to upload to their OpenSpace

Managing the IRIS OpenSpace Account

The main page has three tabs on the top left, **Home**, **Settings** and **Subscription**.

Home

The **Home** tab has three views - **Dashboard**, **Clients** and **Upload File**

Dashboard

The **Dashboard** view displays all documentation for all clients in the payroll software that have had documentation published to IRIS OpenSpace, along with the current status. The documentation is broken down into three sections:

⬜⬜**Files** – Unread Files Received

⬜⬜**E-Approvals** – Awaiting Approval; Approved or Rejected

E-Checklist – Not Started; In Progress or Finalised*
*The E-Checklist is only used by IRIS Personal Tax software – for further details click **here**

Clients

From the **Clients** tab you can:

⬜⬜**+ New Client**

⬜⬜Upload a file to all clients

⬜⬜Search for a client by Client **Name** or Client **ID**

⬜⬜Check a Client's **Status** for instance, **Not Registered** or **Active**

Edit Client – allows you to add a client user, delete a client user, resend activation request, edit client user email address

Click on the relevant **Client Name** - this will take you to the **Files** view and display current documents together with information such as the date **Uploaded**, the **e-Approval** status, file **Size** and **Owner**

e-Approval

This view shows all the documents where approval has been requested for the relevant Client, along with their current **Status** regarding e-Approval, for instance if approval has been requested or if the document has been approved and who it has been approved by. This section will retain a record of approvals even after the file has been deleted.

e-Checklist

e-Checklists are a great way to collate tax information electronically for your clients. They eradicate the cost of producing and posting paper checklists, whilst negating data entry overhead and errors.

This valuable integration, offered by IRIS Personal Tax – part of the IRIS Accountancy Suite and IRIS OpenSpace, means that you receive the client tax data you need, when you need it.

Manually uploading and managing documents in IRIS OpenSpace

IRIS OpenSpace allows you to upload any document and share then with all clients.

Manually uploading documents

Existing client - select client, Upload file, Browse for file, Open

Non-IRIS Client - create a New Client Select client, Upload file, Browse for file, Open

Deleting Documents

If you accidentally delete a file you can immediately restore the file from the **Trash** can.

Deleting - select the box next to the document you want to delete then click '**Delete**'

Restoring - click the Trash icon located at the top of the page, **Restore**

Default Folder Structure

This will allow you to manage the files you are uploading to clients into labelled folders. The default/accountants folder structure can be personalised by adding, removing and renaming folders.

Adding a Top Level folder - highlight the **Top Level folder** select **New Folder**, Name the folder then click '**Update'**

Adding a Subfolder - highlight the folder you want to create the subfolder in, New Folder, Name the folder, Update

Deleting folders - select the box next to the folder, Delete

Clients and Default Folder structure

New non IRIS client - Create a New Client, select **Use Accountant File Structure**

New IRIS client - Automatically created clients that are uploaded from IRIS will not have **Use Accountant File Structure** selected by default. To add, Select client, Edit Client, select **Use Accountant File Structure**, Update

A warning message will display. If you see this message, any files in your **Uploaded From IRIS Practice Suite folder** will not be affected. All other folders will no longer be accessible. You can regain access to the folders, deselect **Use Accountant File Structure**, Update.

Editing Documents

To activate the edit buttons select the document/s you are trying to edit by ticking the box next to them.

Notify - notifies the client the file has been uploaded

Edit - allows you to edit the Name and Description, select the tick on the right to save changes

Copy To - copies the document to your chosen folder location

Move To - moves the document to your chosen folder location

Delete - send document to the Trash

Audit Log

This will show you an audit trail of actions carried out in IRIS OpenSpace.

Settings, Audit Log

AUDIT TRAIL			
Date ▼	User	Action	Client Reference
18/10/2012 12:07	Sarah Jones	User Logged In	
18/10/2012 11:06	Sarah Jones	User Logged Out	
18/10/2012 10:45	Sarah Jones	File Uploaded	JOHN SMITH

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IRIS OpenSpace – Security Information

Overview

IRIS OpenSpace is hosted on the Microsoft Windows Azure platform in their EU zone and therefore fully complies with UK data protection guidelines.

IRIS OpenSpace relies on Microsoft's security procedures to ensure physical protection of our systems.

User Security

All user passwords are **Hashed** and **Salted**. Hashing means that IRIS OpenSpace only stores encrypted passwords and therefore it is not possible for anyone to view an actual password in the database.

Salting means that even in the instance of a **rainbow attack** is not possible to crack the encrypted password even if someone were to gain access to our user access database which is protected by Microsoft's Windows Azure built in security.

Only the actual user of an account sets their password; not even the system administrator can set, view or change an individual user's password.

The only way a password can be reset is via a uniquely generated password reset link that is emailed to the user.

File Security

Files are encrypted in transit using **Secure Socket Layer (**SSL) and The **Advanced Encryption Standard** (AES)

IRIS Software Group Internal Procedures

User account and application data is stored in a separate dataset on Microsoft Windows Azure from files that have been uploaded by users; this ensures that application maintenance and enhancements are done without requiring access to customer files.

We run separate instances of Azure for development and the live product, with strict procedures and policies in place restricting access to the live instance.

This protects both customers and IRIS staff from accidental or unauthorized access.

Please note that your use of IRIS OpenSpace is governed by the terms and conditions, details are available here: https://www.irisopenspace.co.uk/Home/TermsAndConditions

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