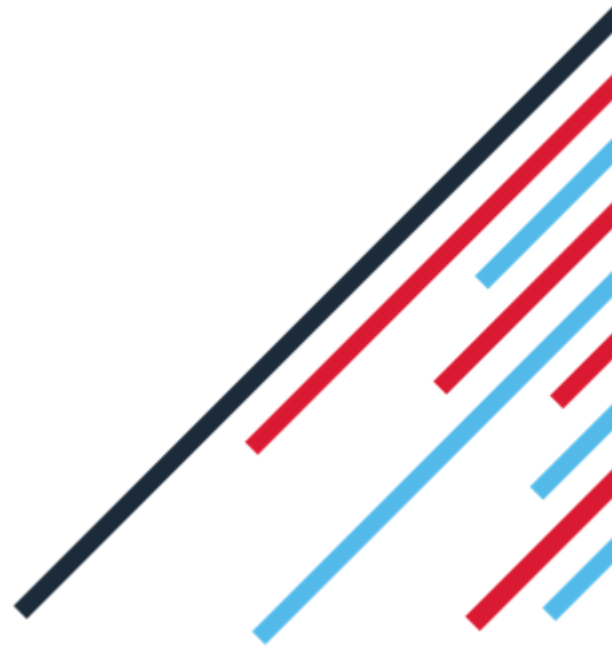


# IRIS OpenSpace

## Website Guide

Version 1.2



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## Dear Customer,

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

IRIS OpenSpace is a cloud solution 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.

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

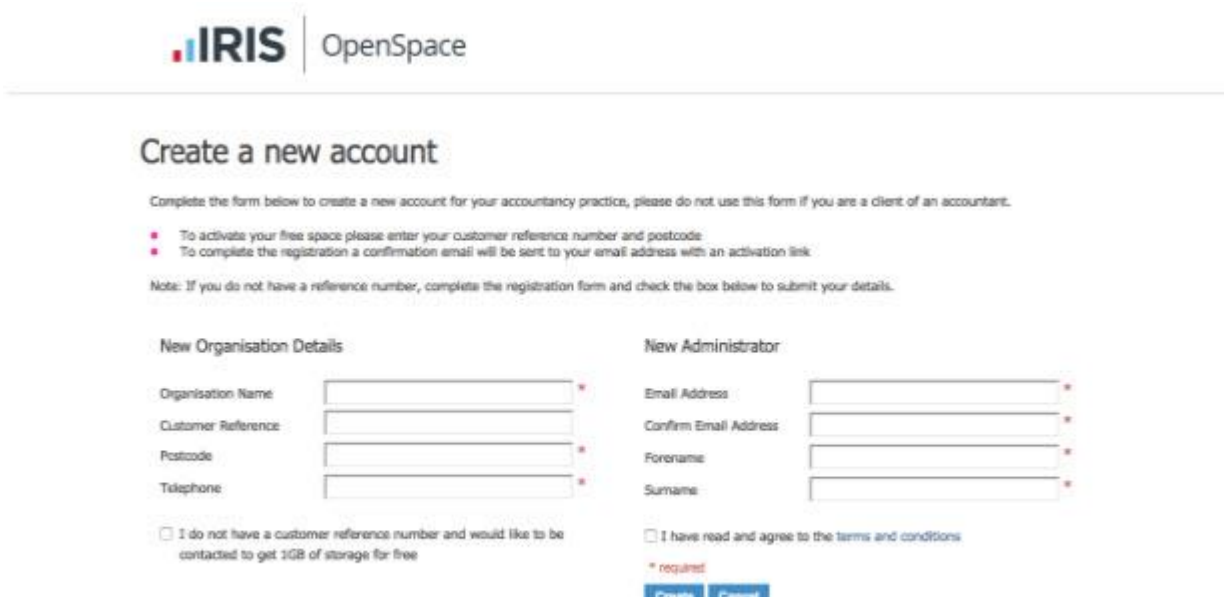
- Guides for configuring your software
- Rebranding IRIS OpenSpace to match your companies look and feel
- A Client Guide is Available. This can be sent to your customers to help explain how IRIS OpenSpace works.

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](http://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**



### 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 **Update**

Your customer reference number can be found on your licence documents

## Email confirmation

If you do not receive the email confirmation

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 **Notify on client file upload** to receive an email every time a client uploads a document to IRIS OpenSpace, this can be changed later on a client by client basis
5. 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.

## Add Staff Member

Use the form below to create a new account.

### Create an Account

Email address	<input type="text" value="user@mypractice.com"/>
First Name	<input type="text" value="First Name"/>
Surname	<input type="text" value="Surname"/>
Is Admin User	<input type="checkbox"/>
Receive notifications from all clients	<input type="checkbox"/>
<input type="button" value="Register"/> <input type="button" value="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**

### Logging into IRIS OpenSpace account

1. Visit [www.irisopenspace.co.uk](http://www.irisopenspace.co.uk)
2. Enter your **Email Address** and **Password** and click **Login**



The screenshot shows the IRIS OpenSpace login interface. At the top left is the IRIS logo, followed by the text 'OpenSpace'. Below this are two input fields: 'Email address' with the value 'user@example.com' and 'Password'. Under the password field is a checkbox labeled 'Remember me?'. Below the checkbox are two links: 'Forgot your password?' and 'Need an account?'. At the bottom of the form is a blue 'Login' button and a link 'Find out more'.

## Managing clients in IRIS OpenSpace

IRIS clients are created automatically by uploading from the IRIS Accountancy Suite. Clients created manually or non-IRIS clients cannot be linked to IRIS OpenSpace from the IRIS Accountancy Suite.

To use IRIS OpenSpace with your IRIS Payroll clients must be created on the IRIS OpenSpace website

If you are using the IRIS Accountancy Suite and IRIS Payroll, create the client via the IRIS Accountancy Suite then link it via IRIS Payroll

## Adding a manual 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   
Client ID   
Notify Client

#### User (Optional)

Email   
Confirm Email   
Contact Forename   
Contact Surname

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

## New Client

### 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.

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.

**Edit Client**

---

Create a new Client Account  
Use the form below to create a new client member.

Email address

First Name

Surname

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.



## 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):



Activate your IRIS OpenSpace account

Dear Test Data,

Your accountant at IRIS Software SME has created an account for you on IRIS OpenSpace so that you can exchange documents instantly and securely. To activate your account please click <http://dbloxham.irisopenspace.co.uk/account/confirm/f50fc336-5949> and create a password.

If you have any questions regarding IRIS OpenSpace please contact your accountant at IRIS Software SME.

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

practicesales@iris.co.uk    iris.co.uk    0844 815 5555

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



## Enter your chosen password

Thank you for registering with IRIS OpenSpace, please enter your password below

Email address	<input type="text" value="@outlook.com"/>
First Name	<input type="text" value="Test"/>
Last Name	<input type="text" value="Data"/>
New password	<input type="password"/> *
Confirm new password	<input type="password"/> *
	<input type="button" value="Set Password"/> <input type="button" value="Cancel"/>

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.irisopenspace.co.uk](http://www.irisopenspace.co.uk). They will also receive an email entitled **Welcome to OpenSpace**. 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.

Edit Client
X

---



**Company Ltd**

Client Name

Description

Client ID


**Receive Notifications**





**Note:**  
The option applies to all users i.e. it overrides the individual selections below.

Default notification setting can be overruled by selections made when staff users upload files, e-Approvals or e-Checklists.

---

Add Client User
Delete Client User
Resend Activation Request

Email	First Name	Surname	Receive Notifications	
 dbloxham@intex.co.uk	John	Doe	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>

Displaying items 1 - 1 of 1

## 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.

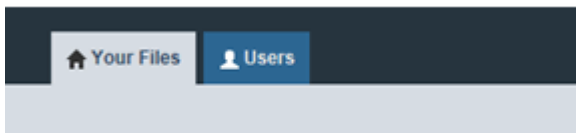
## Client Statuses

<b>Not Registered</b>	The client has been created automatically by uploaded file from IRIS Accountancy Suite, you will need to complete the user details
<b>Registration Sent</b>	An activation email has been sent to the client. We are waiting for client user to activate their account and setup a password
<b>Inactive</b>	The client user has activated their account, created a password but not logged in yet.
<b>Active</b>	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



Don't forget there is a full client guide available at [www.iris.co.uk/support/iris-openspace-support/getting-started/client-guide/](http://www.iris.co.uk/support/iris-openspace-support/getting-started/client-guide/)

## 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

If you are using the IRIS Accountancy Suite and IRIS Payroll, create the client via the IRIS Accountancy Suite then link it in IRIS Payroll. Clients created manually cannot be linked to IRIS OpenSpace from IRIS Accountancy Suite

**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**'

Location: Your Clients > TEST Data (1 files)

	Name	Description	Uploaded	Latest Download	e-Approval	Total Files	Size	Owner
<input type="checkbox"/>	Documents					0 files	0 KB	
<input type="checkbox"/>	Files From IRIS Software SME					0 files	0 KB	
<input checked="" type="checkbox"/>	Notes.jpg		03/04/2015 13:14:25				10 KB	David Bloxham

Displaying items 1 - 3 of 3

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

TRASH

	Name	Uploaded	Size(bytes)	Added to Trash	Ref	Delete
<input type="checkbox"/>	JOHN SMITH-LTD.DOC	17/10/2012 13:00	41908	17/10/2012 13:29	JOHN SMITH	<input type="checkbox"/>

## Default Folder Structure

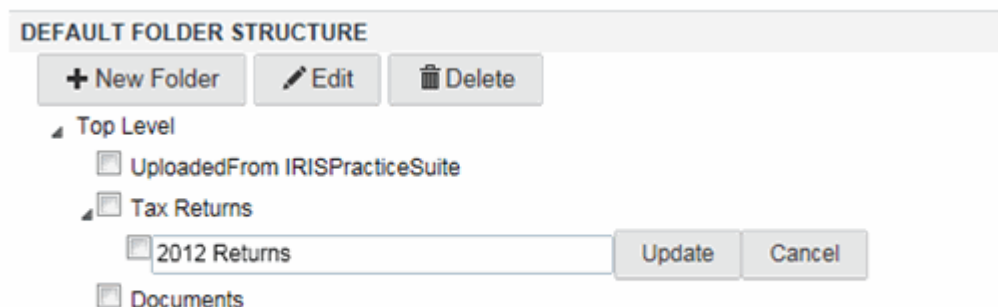
The folders **Uploaded from IRIS Practice Suite** and **Top Level** can be renamed but not deleted. Any files you upload through IRIS Accountancy Suite will automatically save to the folder **Uploaded from IRIS Practice Suite**. Payroll files will be uploaded to a folder called **Files from IRIS Software SME**

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

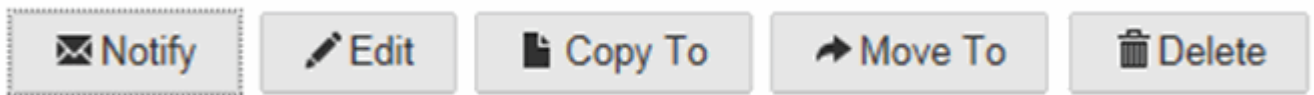
A warning message will display (see screen shot below). If you see this message, any files in your **Uploaded From IRIS Practice Suite folder** will not be affected. All other

folders will no longer be accessible. You can regain access to the folders, deselect **Use Accountant File Structure**, Update.

Please note by changing this setting the client will lose access to their current folders. You can reverse this action by altering this setting at any time.

## 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		
<input type="text"/>	<input type="button" value="Search"/>	
Date ▼	User ▼	Action ▼
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

## 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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