

## Multiple Approvals

IRIS OpenSpace has launched Multiple Approvals, allowing customers to upload multiple documents to clients and request approval from one or more users on each document.

This new functionality not only allows multiple documents to be uploaded for approval at the same time, but gives customers the ability to request approval of a document from more than one person within a company.

## Single & Multiple Approvals

Once the client and folder have been selected, where the uploaded file(s) need to go, the following screen displays.

Select the file(s) to the client's OpenSpace. More than one file can be selected at a time. Files can also be dragged and dropped anywhere on this page to start uploading.

**Upload to C2's Documents Folder**

Choose files to upload to your client's OpenSpace. You can select more than one file at a time. You can also drag and drop files anywhere on this page to start uploading.

Name	Size
No records to display.	

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Displaying items 0 - 0 of 0

[Add Files](#) [Cancel](#)

When all the files have been uploaded, the following screen displays.

Files in PDF format will have two e-Approval Types to select from:

**Single User** - if document is uploaded to multiple users, only one requested approval is required for the document to be marked '**Approved**'.

**All Users** - if document is uploaded to multiple users, all users to whom a request has been sent must approve the document before is it marked '**Approved**'.

**Upload to C2's Documents**

Choose files to upload to your client's OpenSpace. You can select more than one file at a time. You can also drag and drop files anywhere on this page to start uploading.

Client has given consent to electronically approve their documents  
 Do not send email notifications

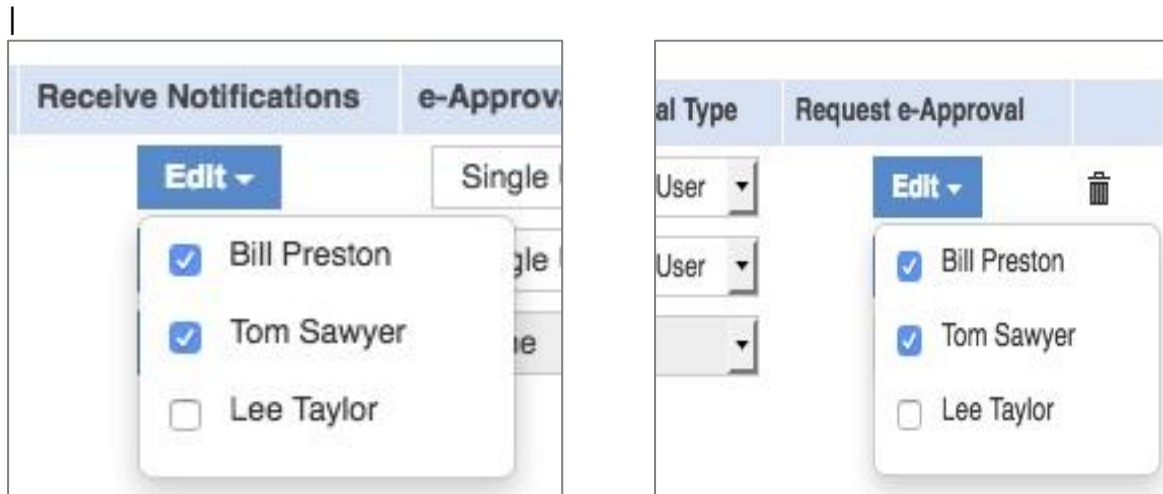
**Single User** - If document is uploaded to multiple users, only one requested approval is required for the document to be marked 'Approved'.

**All Users** - If document is uploaded to multiple users, all users to whom a request has been sent must approve the document before is it marked 'Approved'.

File Name	Receive Notifications	e-Approval Type	Request e-Approval
MultipleAgents.pdf 115.8kB	<a href="#">Edit</a>	Single User	<a href="#">Edit</a>
ofscaa.pdf 390.0kB	<a href="#">Edit</a>	All Users	<a href="#">Edit</a>
Presenter Letter.doc 27.6kB	<a href="#">Edit</a>	None	<a href="#">Edit</a>

[Add Files](#) [Upload](#) [Cancel](#)

Click on the Edit drop-down arrows to select who will **Receive Notifications** and who will be **Request e-Approval**.



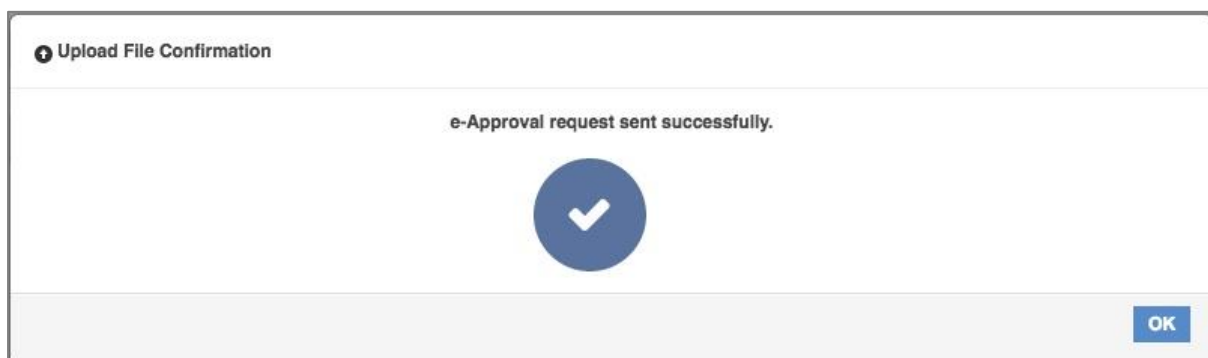
When all the selections have been made, click **Upload**.

If files have been sent for approval, the following screen displays.

Select the **'signing statement to appear on the coversheet'** and click **Request Approval**.



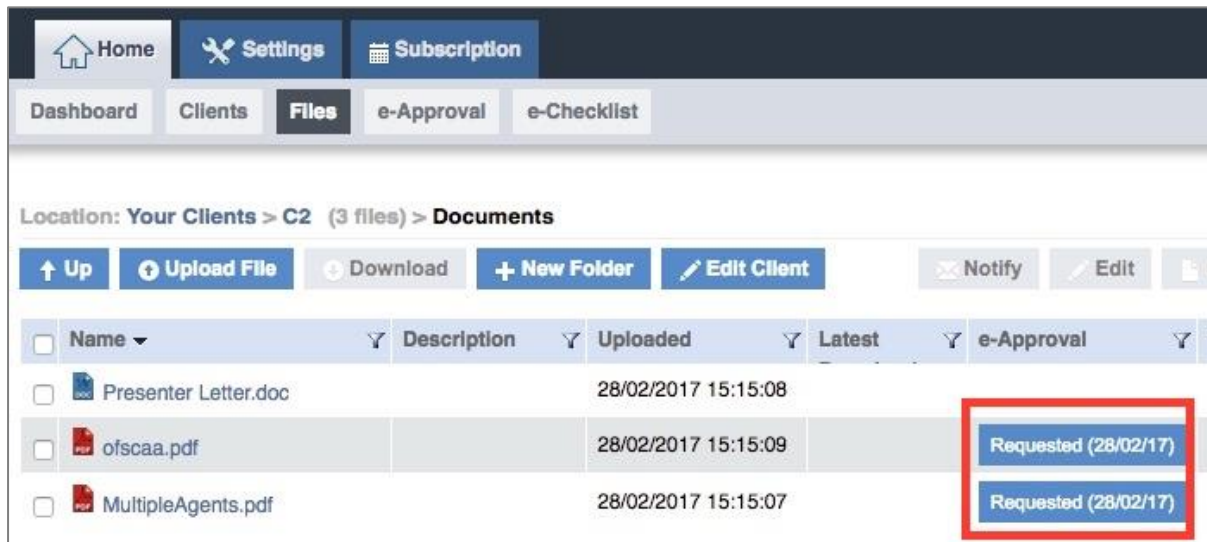
The following screen displays:



## Viewing Approval Status

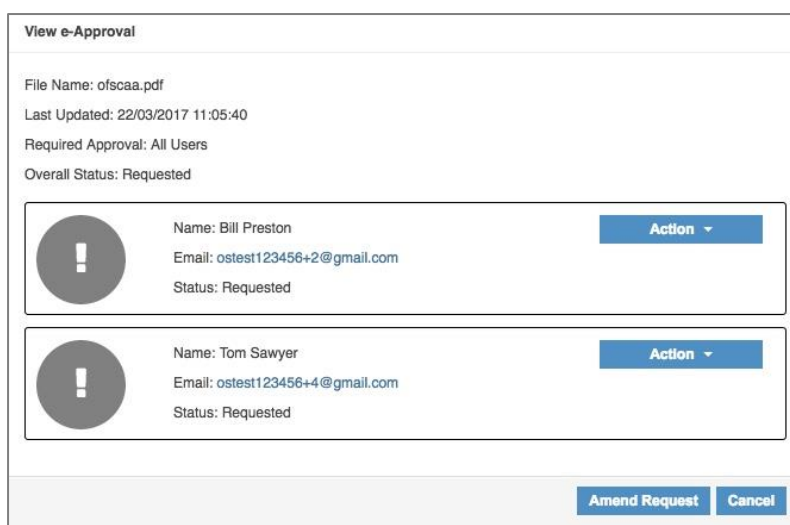
When the file has been requested the status can be seen on the dashboard, e-Approval option and on the file itself when viewing in the client folder.

Click Requested to display the e-Approval status screen:



From here the e-Approval can be cancelled, requested and amended.



On the screen below both client users, selected earlier, haven't approved yet, as the **e-Approval Type** was set to **All Users** :



When one client user approves the file the status will change to **Pending**:

**View e-Approval**

File Name: ofscaa.pdf  
Last Updated: 22/03/2017 11:07:07  
Required Approval: All Users  
Overall Status: Pending



	Name: Bill Preston Email: ostest123456+2@gmail.com Status: Approved	IP Address: 213.48.71.84 Timestamp: 22/03/2017 11:07 (GMT)
	Name: Tom Sawyer Email: ostest123456+4@gmail.com Status: Requested	<a href="#">Action</a> ▾

[Amend Request](#) [Cancel](#)

If a client user rejects the file, click the **Action** drop-down to select **Cancel Request** or **Re-send Request**:

**View e-Approval**

File Name: ofscaa.pdf  
Last Updated: 22/03/2017 11:13:45  
Required Approval: All Users  
Overall Status: Rejected

	Name: Bill Preston Email: ostest123456+2@gmail.com Status: Approved	IP Address: 213.48.71.84 Timestamp: 22/03/2017 11:07 (GMT)
	Name: Tom Sawyer Email: ostest123456+4@gmail.com Status: Rejected <b>Reason</b> not correct	<a href="#">Action</a> ▾ Re-send Request Cancel Request

[Amend Request](#) [Cancel](#)

Requests can also be amended; however this will only effect client users who haven't been sent the approval. For example, Lee wasn't on the original approval request so he can be added at this point:

Are you sure you want this client to approve - ofscaa.pdf?

Request eApproval

Required Approvals

Client has given consent to electronic

Choose an appropriate signing statement to appear on the coversheet:

Tax return approval  Generic approval  Custom approval

[Client] confirms that the information is correct and complete to the best of their knowledge and belief.

Do not send email notifications

Request Cancel

Once all client users have approved the file, the following approved status displays:

**View e-Approval**

File Name: ofscaa.pdf

Last Updated: 22/03/2017 11:14:50

Required Approval: All Users

Overall Status: Approved

Document ID: 0158EE39B17CF7

	Name: Bill Preston Email: ostest123456+2@gmail.com Status: Approved	IP Address: 213.48.71.84 Timestamp: 22/03/2017 11:07 (GMT)
	Name: Tom Sawyer Email: ostest123456+4@gmail.com Status: Approved	IP Address: 213.48.71.84 Timestamp: 22/03/2017 11:14 (GMT)

OK