



# **Guide to setting up IRIS AE Suite™ & IRIS OpenSpace online**

**Earnie™**

April 2019

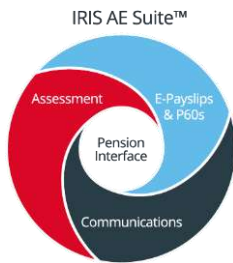


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## Dear Customer,

Welcome to your guide to setting up and using the IRIS AE Suite™ and IRIS OpenSpace web portal.



The IRIS AE Suite™ consists of several elements, including Auto enrolment (within your payroll software), IRIS OpenEnrol and IRIS OpenPayslips/P60s/P45s. For more details on the IRIS AE Suite™ please contact Sales on **0344 815 5656**.

The Guide will describe how to set up and use each function on the web and within your payroll software.

The Guide contains instructions on setting up the cloud portal for the following elements of the IRIS AE Suite™:

- 1. IRIS OpenEnrol**
- 2. IRIS OpenPayslips, P60s and P45s**

It also includes:

- 3. IRIS OpenSpace**

Further help can also be found on our [website](#)

## What is IRIS OpenEnrol?

IRIS OpenEnrol is an element of the IRIS AE Suite™; a new way to distribute workplace pension communications to employees. Letters that need to be sent to employees, in order to comply with legislation, will be created automatically when you run the payroll. They will then be published to a secure online portal. The letters are emailed directly to each employee, and once they have registered with the portal they will be able to quickly view all of their past automatic enrolment letters in an easy to access, secure area.

## What will IRIS OpenEnrol do for me?

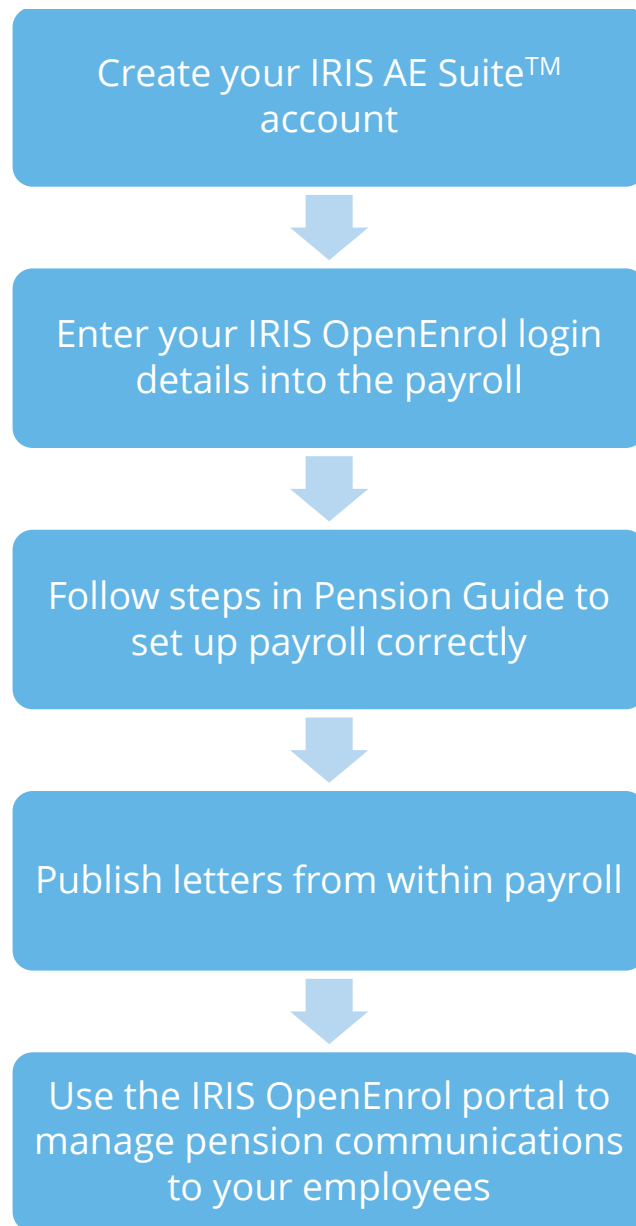
- Employees receive pension communications directly via email
- Letters can be accessed anywhere an internet connection is available
- Quick and easy to setup with no software to install
- Increases Automatic Enrolment administration efficiency
- Reduces carbon footprint demonstrating an environmentally friendly solution
- Reduces communication distribution costs including printing, postage and processing
- Fully secure
- Allows employees immediate 24/7 access to their own pension communication information
- Free IOS, Android and Windows Phone apps available for employees to securely view their own pension communications on tablets or smartphones
- Log into IRIS OpenEnrol to print any communications if an employee does not have an email address
- All published communications are date stamped for audit purposes and a copy stored against the employee record

## How does IRIS OpenEnrol work?

Certain Automatic Enrolment triggers during the payroll run will cause a communication to be created, which you then need to publish to the IRIS OpenEnrol secure website. IRIS OpenEnrol takes that data and creates letters in the form of Adobe PDF files to be sent to your employees.

- If the employee has an IRIS OpenEnrol account an Adobe PDF version of the letter will be emailed to the employee and stored online
- If the employee does not have an account but has an email address they will still receive the pension communication but will also be asked if they wish to set up their online account. The letter content is in the email, meeting the TPR key requirements
- If the employee does not have an email address, log into IRIS OpenEnrol to print the required letter

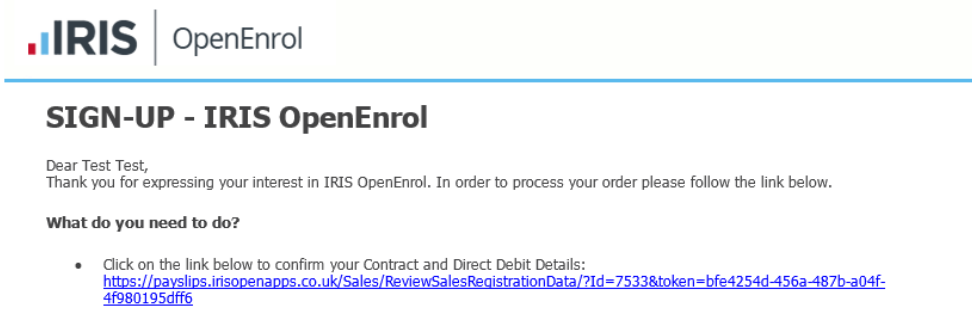
## Steps to setting up and using IRIS OpenEnrol



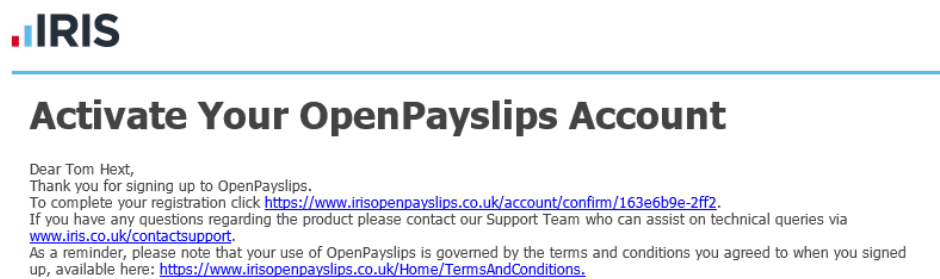
## How to create an IRIS OpenEnrol account

If you have an IRIS OpenPayslips account you do not need to set up a new account for IRIS OpenEnrol; you can click the **Login** button and login as normal

1. Once you have signed up for the IRIS AE Suite™ you will receive an email confirming your IRIS OpenEnrol account has been created. Click on the link to confirm your Contract and Direct Debit details



2. You will then receive an email confirming your account has been created. Click on the link in that message to complete your registration



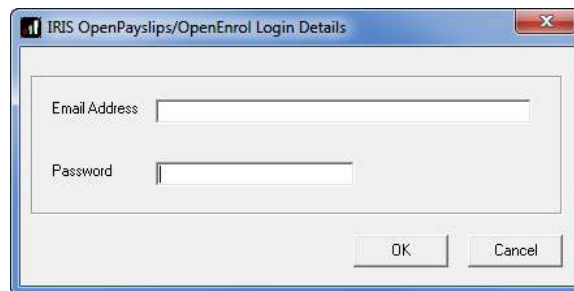
3. Enter your New password, Confirm new password and click on the **Set Password** button

4. Another email will be sent confirming those password details. You are now ready to use IRIS OpenEnrol

## How to set up IRIS OpenEnrol in the payroll software

The **New Administrator - Email Address** needs to be added to the payroll software and all employees must have a valid email address.

1. Log into Admin, click on **File | Online Login Details | IRIS OpenPayslips/OpenEnrol**
2. Enter the email address and password registered on the portal and click **OK**



3. Log back into the payroll software. If you need to you can set different login details for each company on **Company | Alter Company Details | Open IDs**
4. Make sure all employees have an up-to-date, valid email address within **Employee details**

For IRIS OpenEnrol to operate correctly it is vital for certain information to be present. Instructions on what else you must do can be found in the Pension Guide, which you can access via the **Pension** menu in your payroll software

The Pension Guide also details how the letters are created and how to publish them



## How to administer your employees' pension communications using IRIS OpenEnrol

1. Visit the IRIS OpenEnrol website at <https://www.irisopenpayslips.co.uk/> and click the **Login** button



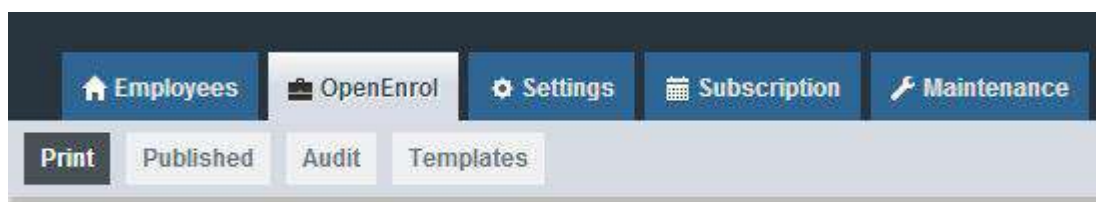
The image shows the login page for IRIS OpenEnrol. At the top left is the IRIS logo. To its right, the text 'OpenEnrol' and 'OpenPayslips' is displayed. Below this, there are two input fields: 'Username' and 'Password', both highlighted in yellow. Under the password field is a checkbox labeled 'Remember me?'. Below the checkbox is a blue link that says 'Forgot your password?'. At the bottom of the form are two buttons: 'Login' and 'Cancel'.

2. Enter here the login details you entered when you created the IRIS OpenEnrol account. **User name** is the **Email Address** you used. Click the **Login** button

**NOTE:** To receive a password reminder simply click the '**Forgot your password?**' link

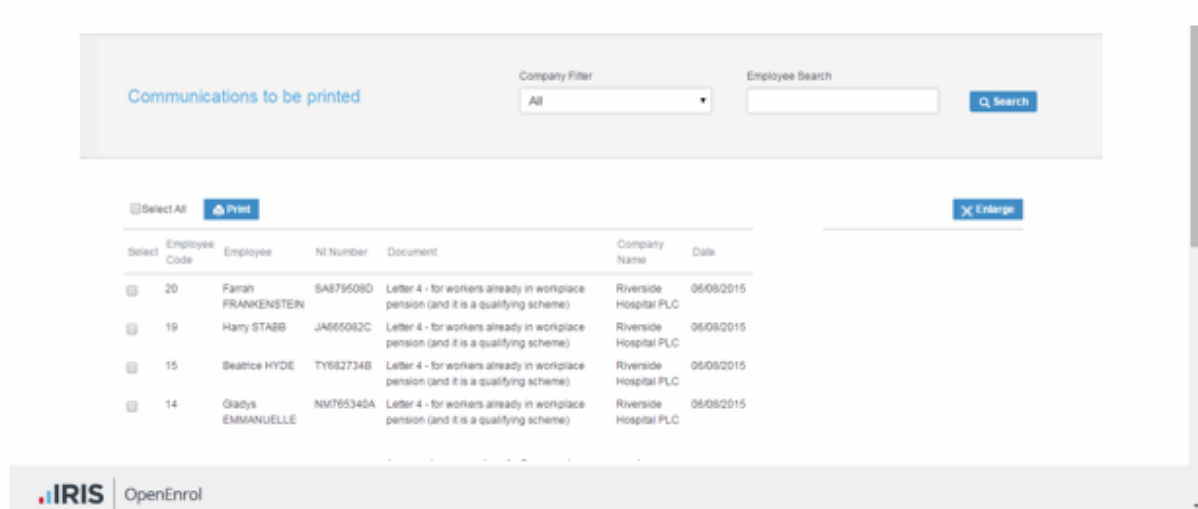
The first screen you see on logging in is the **Employees** tab. (If you do not have OpenPayslips this screen is read-only). This is a summary of what has happened recently within the company.

3. Click on the **OpenEnrol** tab



The **OpenEnrol** tab has four views, **Print**, **Published**, **Audit** and **Templates**. It opens by default on the **Print** view.

## Print



Communications to be printed

Company Filter: All | Employee Search: [ ] [ Search ]

[ Select All ] [ Print ] [ Enlarge ]

Select	Employee Code	Employee	NI Number	Document	Company Name	Date
<input type="checkbox"/>	20	Farah FRANKENSTEIN	SA879508D	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/09/2015
<input type="checkbox"/>	19	Hary STABB	JAM65082C	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/09/2015
<input type="checkbox"/>	15	Beatrice HYDE	TY682734B	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/09/2015
<input type="checkbox"/>	14	Olavys EMMANUELLE	NM765340A	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/09/2015

IRIS OpenEnrol

Ideally, your employees will have email addresses set up within the payroll software so that when you click the **Publish** button (as described within the **Pension Guide**) the pension communications will be sent automatically via email to those employees. They will also be able to set up their own IRIS OpenEnrol accounts, and access their own communications via the portal.

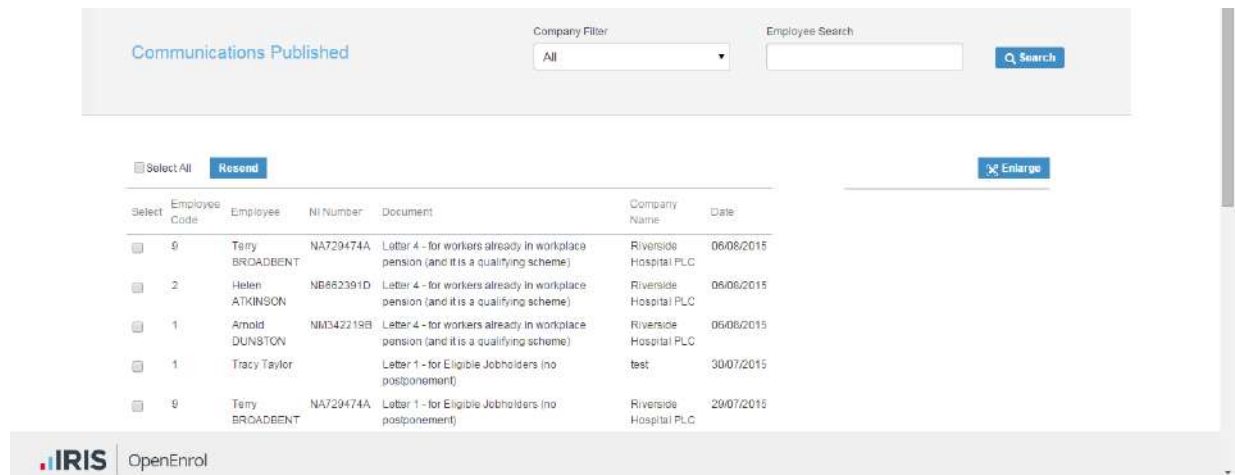
However there may be some employees who are unable to receive their communications this way as they do not have an email address. You are able to print their letters via this **Print** section of the IRIS OpenEnrol portal and send them a physical copy, whilst retaining a record of having sent the communication for audit purposes.

1. Use the **Company Filter** to view results by company, and **Employee Search** to find particular individuals
2. Click the **Select All** box or tick the boxes to select particular letters. Then click the **Print** button

## Published

You may need to resend emails or merely see what communications have been sent. To do this:

1. Click the **Published** button to open the **Published** view



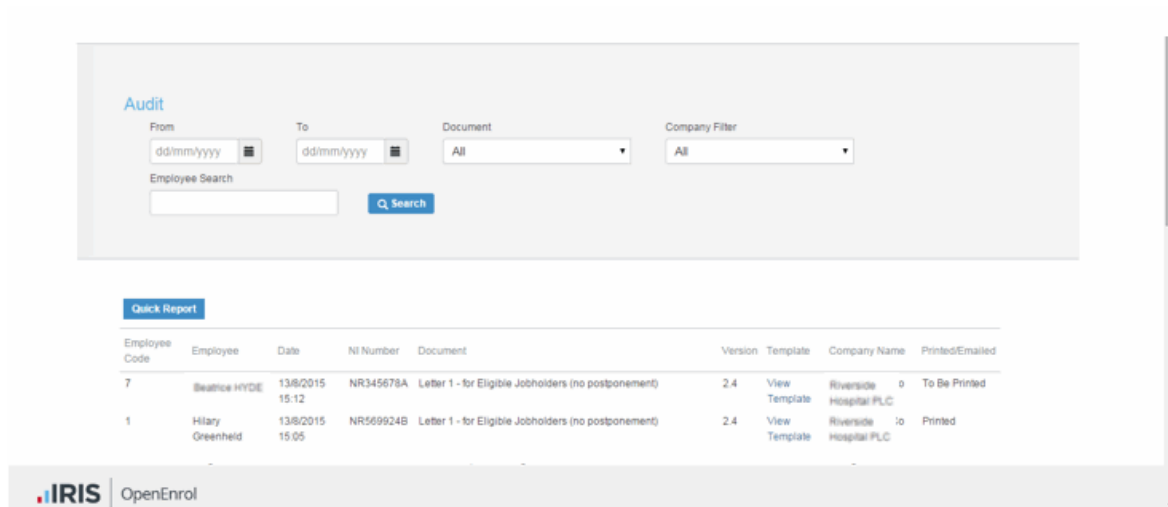
The screenshot shows the 'Communications Published' interface. At the top, there is a 'Company Filter' dropdown set to 'All' and an 'Employee Search' input field with a 'Search' button. Below this is a table of communications. The table has columns for 'Select', 'Employee Code', 'Employee', 'NI Number', 'Document', 'Company Name', and 'Date'. There are checkboxes in the 'Select' column and a 'Resend' button above the table. An 'Enlarge' button is also visible.

Select	Employee Code	Employee	NI Number	Document	Company Name	Date
<input type="checkbox"/>	9	Terry BROADBENT	NA729474A	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	2	Helen ATKINSON	NB652391D	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	1	Arnold DUNSTON	NM342219B	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	1	Tracy Taylor		Letter 1 - for Eligible Jobholders (no postponement)	test	30/07/2015
<input type="checkbox"/>	9	Terry BROADBENT	NA729474A	Letter 1 - for Eligible Jobholders (no postponement)	Riverside Hospital PLC	29/07/2015

You are able to view a list of all the emailed communications, as well as resend the emails if necessary, from this screen.

2. Use the **Company Filter** to view results by company, and **Employee Search** to find particular individuals
3. Click the **Select All** box, or tick the boxes to select particular letters. Then click the **Resend** button to resend the emails previously sent through the payroll software

## Audit



The screenshot shows the 'Audit' section of the IRIS system. It includes a search interface with the following fields:

- From:** dd/mm/yyyy
- To:** dd/mm/yyyy
- Document:** All
- Company Filter:** All
- Employee Search:** (empty text box)
- Search:** (button)

Below the search interface is a 'Quick Report' button and a table of audit entries:

Employee Code	Employee	Date	NI Number	Document	Version	Template	Company Name	Printed/Emailed
7	Beatrice HYDE	13/8/2015 15:12	NR345678A	Letter 1 - for Eligible Jobholders (no postponement)	2.4	View Template	Riverside Hospital PLC	To Be Printed
1	Hilary Greenheld	13/8/2015 15:05	NR569924B	Letter 1 - for Eligible Jobholders (no postponement)	2.4	View Template	Riverside Hospital PLC	Printed

At the bottom left of the interface, the IRIS logo and 'OpenEnrol' are visible.

The **Audit** section is primarily for the Pensions Regulator, so you can provide evidence that you are meeting your legal obligations regarding pension communications.

1. Use the filters **From**, **To**, **Document**, **Company Filter** and **Employee Search** to narrow the list of entries as required
2. Click the **Quick Report** button to download a PDF version of the data on your screen

## Templates

[Template History](#)

Template Type	Version	Reason For Change	Live Date	View
Auto Enrolment Is Coming	1.3	Logo changed	2015-07-16	<a href="#">View Template</a>
Letter 1 - for Eligible Jobholders (no postponement)	2.4	Logo changed	2015-07-16	<a href="#">View Template</a>
Letter 1P - for Eligible Jobholders (Postponement Version)	2	Initial Version	2014-12-03	<a href="#">View Template</a>
Letter 1T - for Eligible Jobholders (Transitional Version)	2	Initial Version	2014-12-03	<a href="#">View Template</a>
Letter 1 - Opt in/Joining Scheme	2	Initial Version	2014-12-03	<a href="#">View Template</a>
Letter 2 & 3 - for Non-Eligible Jobholders and Entitled Workers	2	Initial Version	2014-12-03	<a href="#">View Template</a>
Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	2	Initial Version	2014-12-03	<a href="#">View Template</a>
Letter 6 - for all workers - postponement	2	Initial Version	2014-12-03	<a href="#">View Template</a>

« 1 »
Displaying items 1 - 8 of 8

You can view the various **Templates** that are in use to create the letters, see what the current versions are and edit them in order to add your own logo and signature.

1. Click on the **Templates** button to open the **Templates** view
2. In the **View** column, click on the **View Template** link next to the template you are interested in
3. The screen will change to the **Edit Template** view. This will show the changes that have been made to that particular template, and when they were made

[Edit Template](#)

« Back
[Edit Logo...](#)
[Edit Signature...](#)

Version	Document	Reason of Change	Live Date	View Template
1.3	Auto Enrolment Is Coming	Logo changed	2015-07-16	<a href="#">View Template</a>
1.2	Auto Enrolment Is Coming	Logo changed	2015-07-16	<a href="#">View Template</a>
1.1	Auto Enrolment Is Coming	Logo changed	2015-07-16	<a href="#">View Template</a>
1	Auto Enrolment Is Coming	Initial Version	2014-05-20	<a href="#">View Template</a>

« 1 »
Displaying items 1 - 4 of 4

To add your logo to the template:

1. Click the **Edit Logo** button

A screenshot of a web application dialog box titled "Edit Template" with a close button (X) in the top right corner. The dialog contains two rows of input fields. The first row is labeled "Upload New Logo:" and has a text input field followed by a "Browse..." button. The second row is labeled "Upload New Signature:" and also has a text input field followed by a "Browse..." button. At the bottom right of the dialog, there are two buttons: "Close" and "Save Changes".

(This screen may look slightly different if using a browser other than Internet Explorer)

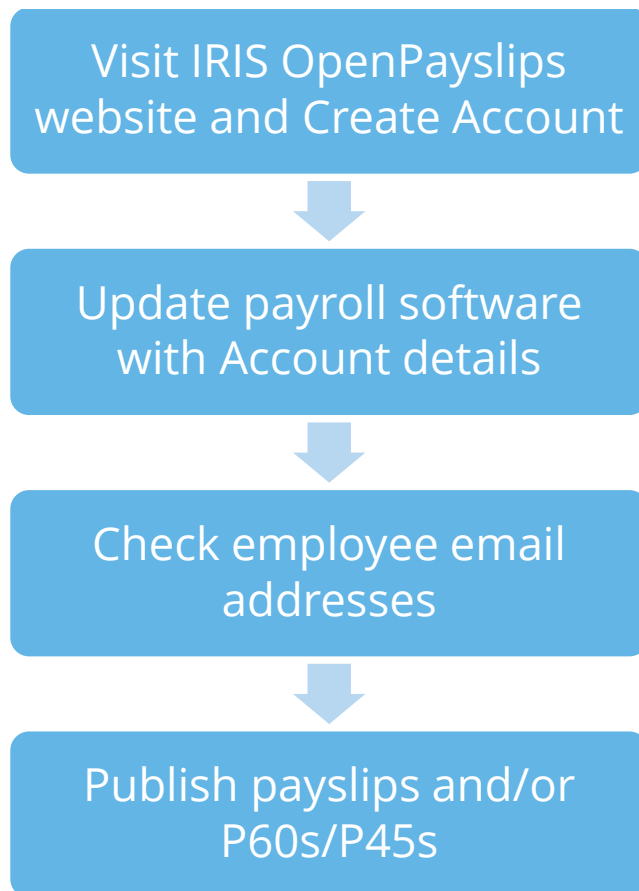
2. Click the **Browse** button next to **Upload New Logo** then browse for your logo on your system and click **Open**
3. Click **Save Changes** and your amended template will appear in the list as the latest version. Click the **View Template** link to view a PDF of your amended template

## What is IRIS OpenPayslips?

IRIS OpenPayslips is a new way to distribute payslips and P60s/P45s to employees. Payslips and P60s/P45s are published from within the payroll software to a secure online payslip portal. Once employees have registered with the portal they are able to quickly view all of their current and historic payslips and/or P60s/P45s in an easy to access, secure area.

- All payslip/P60/P45 information is taken directly from the payroll software and displayed exactly how they are usually seen
- Payslips/P60s/P45s can be accessed anywhere an internet connection is available
- Quick and easy to setup with no software to install
- Increases payroll processing efficiency
- Reduces carbon footprint demonstrating an environmentally friendly solution
- Reduces payslip/P60/P45 distribution costs including printing, postage and processing
- Fully secure
- Allows employees immediate 24/7 access to their own pay information
- Easy access to historical pay information for both employer and employee
- Free IOS, Windows phone and Android apps available for employees to securely view their own payslips/P60s/P45s on tablets or smartphones

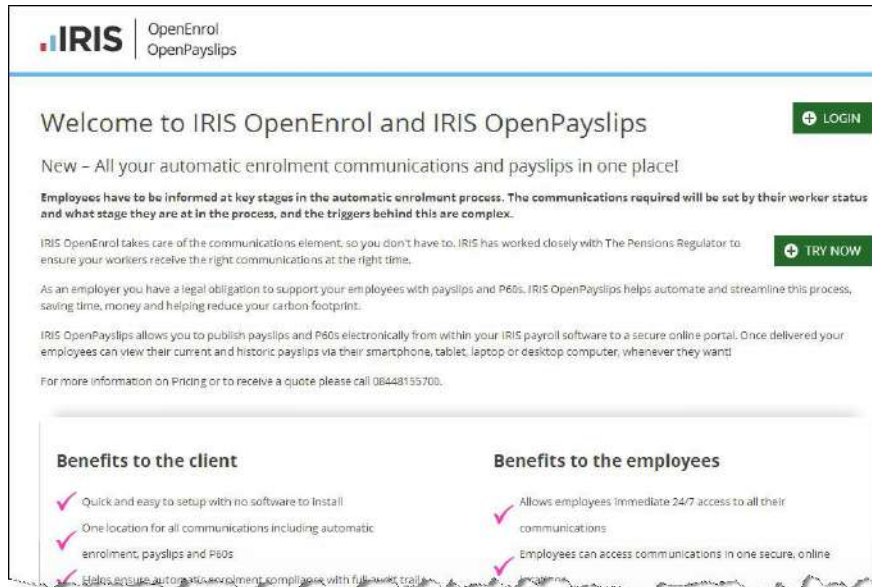
## Steps to setting up and using IRIS OpenPayslips



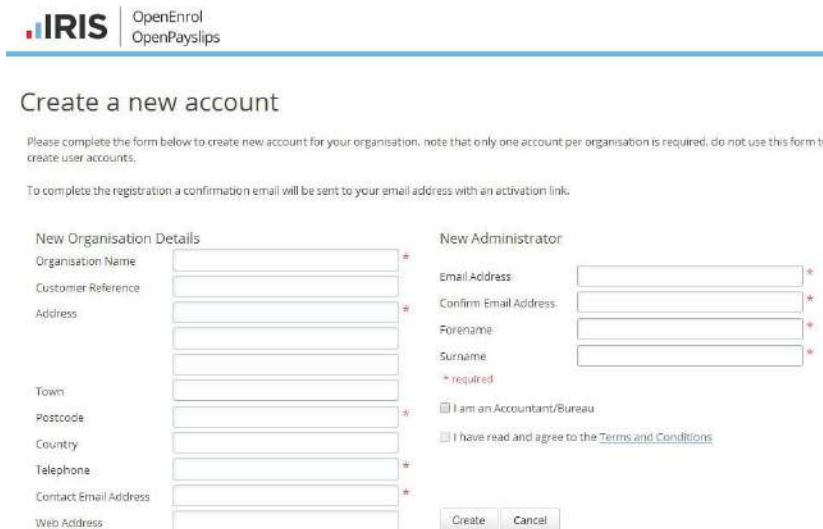


## How to create an IRIS OpenPayslips account

1. Visit the IRIS OpenPayslips website [here](#)



2. Click **Try Now** to open the following screen:



**Create a new account**

Please complete the form below to create new account for your organisation. note that only one account per organisation is required, do not use this form to create user accounts.

To complete the registration a confirmation email will be sent to your email address with an activation link.

**New Organisation Details**

Organisation Name \*

Customer Reference \*

Address \*

Town \*

Postcode \*

Country \*

Telephone \*

Contact Email Address \*

Web Address \*

**New Administrator**

Email Address \*

Confirm Email Address \*

Forename \*

Surname \*

\* required

I am an Accountant/Bureau

I have read and agree to the [Terms and Conditions](#)

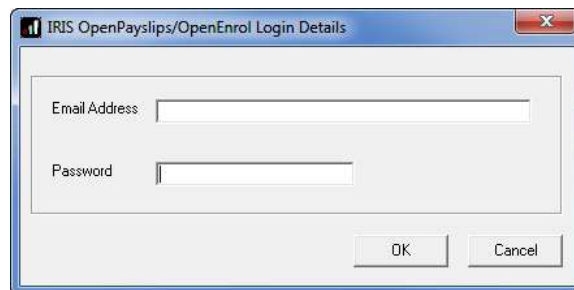
Create Cancel

3. Enter the required details then click **Create**. An activation email will be sent to the **New Administrator - Email Address**
4. Click the link in the email to be taken back to the IRIS OpenPayslips website
5. Enter a Password and click **Set Password**

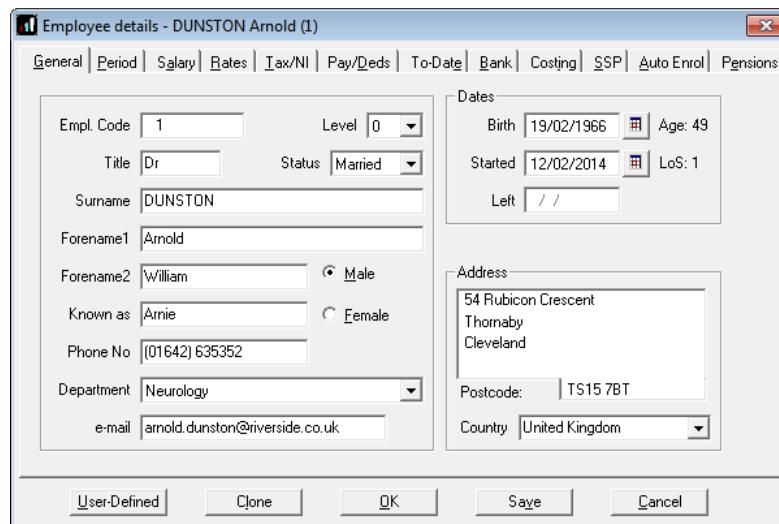
## How to update the payroll software

The **New Administrator - Email Address** needs to be added to the payroll software and all employees must have valid email addresses.

1. Log into **Admin**, click on **File | Online Login Details | OpenEnrol/OpenPayslips**
2. Enter the email address and password registered on the IRIS OpenPayslips website and click **OK**



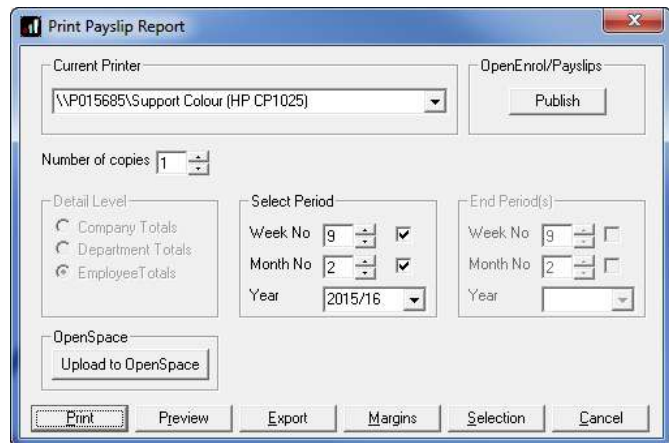
3. Log back into the payroll. If you need to you can set different login details for each company on **Company | Alter Company Details | Open IDs**
4. Make sure all employees have up-to-date, valid email addresses within **Employee details**



## How to publish payslips/P60s/P45s to the IRIS OpenPayslips portal

### Payslips

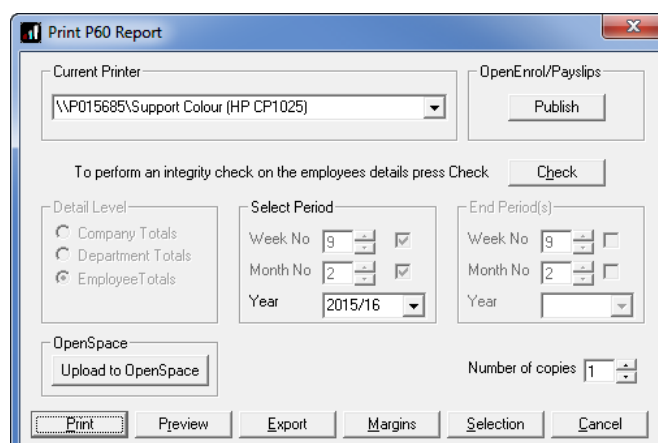
1. Go to **Reports | Print Payslips** and select the required pay periods
2. Click the OpenEnrol/Payslips **Publish** button in the top right of the **Print Payslip Report** screen
3. If not all employees have an email address, a message will appear asking if you wish to print payslips for those individuals
4. Select **Yes** or **No**



5. All employees paid in the selected pay period with an email address will then be sent an email asking them to register with the IRIS OpenPayslips website to view/print their payslip

### P60s

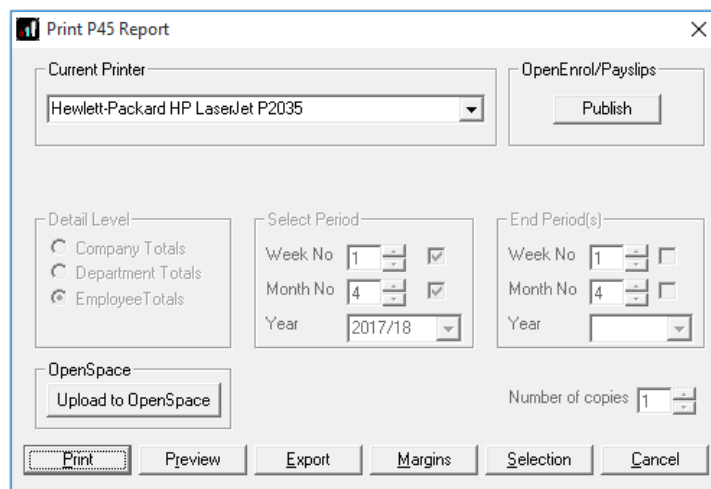
1. From **Reports | Library Selection | Miscellaneous**, and select **P60 (OpenPayslips)** (this only needs to be done once)
2. Select **Reports | Year-end Forms**
3. Select the P60 (OpenPayslips)
4. Click the **Publish** button at the top of the screen



5. All current employees paid in the tax year with an email address will then be sent an email asking them to register with the IRIS OpenPayslips website to view/print their P60

## P45s

1. From **Reports | Library Selection | Miscellaneous**, and select **P45 (OpenPayslips)** (this only needs to be done once)
2. Go to **Employee | P45 Routines | Issue P45**
3. Choose the employee and click **OK**
4. Enter the **Leaving Date** and click **Print**
5. Select **P45 (OpenPayslips)**
6. Click the **Publish** button at the top of the screen



7. As long as the employee has an email address in their record, an email will then be sent asking them to register with the IRIS OpenPayslips website to view/print their P45

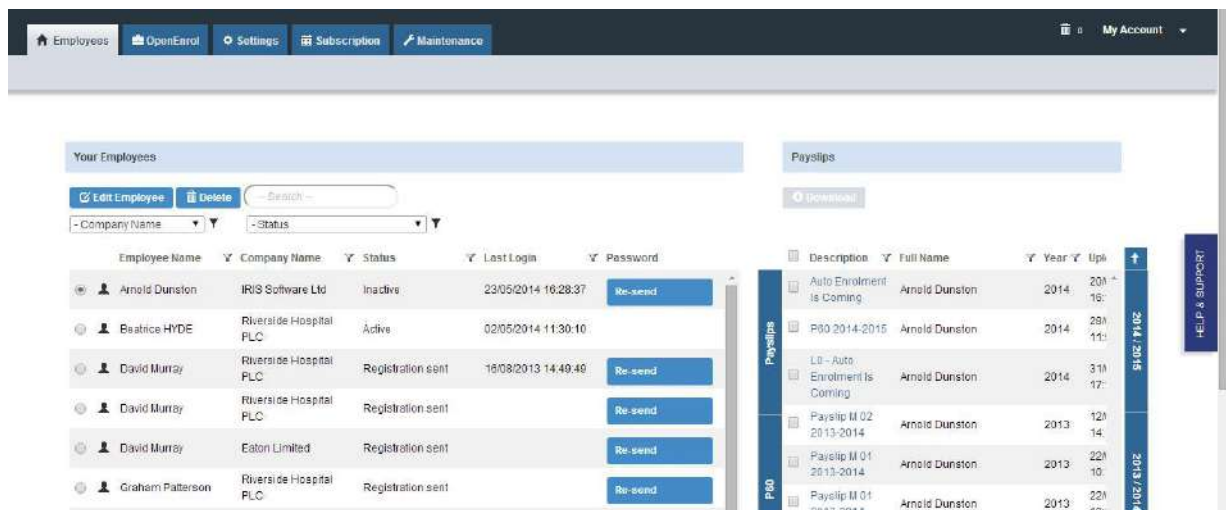
## How the employer views the published payslips/P60s/P45s

To view the published payslips/P60s/P45s:-

1. Go to the IRIS OpenPayslips website at <https://www.irisopenpayslips.co.uk/> and log in with your registered email address and password
2. Click on an employee's name and the screen will change on the right to show only their communications
3. Select the tax year on the right that you wish to look at then click on either the **Payslips** tab, **P60** tab or **P45** tab and the screen changes again to show the payslips/P60s/P45s uploaded for the employee in that tax year
4. Click on the Payslip, P60 or P45 and a new browser tab will open containing a copy to be viewed or printed as needed
5. Click back to the first browser tab to return to IRIS OpenPayslips

## Managing the IRIS OpenEnrol & IRIS OpenPayslips Account

The main page has five tabs on the top left, **Employees**, **OpenEnrol**, **Settings**, **Subscription** and **Maintenance**. (**IRIS OpenEnrol** is detailed earlier in this guide).



The screenshot shows the IRIS OpenPayslips web interface. At the top, there is a navigation bar with tabs for Employees, OpenEnrol, Settings, Subscription, and Maintenance. Below this, the main content area is divided into two sections: 'Your Employees' and 'Payslips'.

**Your Employees** section includes a search bar and a table with the following data:

Employee Name	Company Name	Status	Last Login	Password
Arnold Dunston	IRIS Software Ltd	Inactive	23/05/2014 16:28:37	Re-send
Beatrice HYDE	Riverside Hospital PLC	Active	02/05/2014 11:30:10	
David Murray	Riverside Hospital PLC	Registration sent	16/08/2013 14:49:49	Re-send
David Murray	Riverside Hospital PLC	Registration sent		Re-send
David Murray	Eaton Limited	Registration sent		Re-send
Graham Patterson	Riverside Hospital PLC	Registration sent		Re-send

**Payslips** section includes a 'Download' button and a table with the following data:

Description	Full Name	Year	Upd
Auto Enrolment is Coming	Arnold Dunston	2014	201
P60 2014-2015	Arnold Dunston	2014	29A
LB - Auto Enrolment is Coming	Arnold Dunston	2014	31A
Payslip M 02 2013-2014	Arnold Dunston	2013	12A
Payslip M 01 2013-2014	Arnold Dunston	2013	22A
Payslip M 01 2013-2014	Arnold Dunston	2013	22A

On the right side of the Payslips table, there are vertical tabs for '2014/2015', '2013/2014', and '2012/2013'. A 'HELP & SUPPORT' button is located on the far right.

## Employees

The **Employees** tab displays all employees from all companies in the payroll software that have had payslips published to IRIS OpenPayslips, along with their current **Status**.

The list of employees can be sorted using any of the columns; **Status** shows whether a registration email has been sent and whether the employee has registered with IRIS OpenPayslips yet.

### How to edit an employee's details

1. On the **Employees** tab select the individual using the radio buttons on the left, then click **Edit Employee**



2. Amend details, then click **Update**

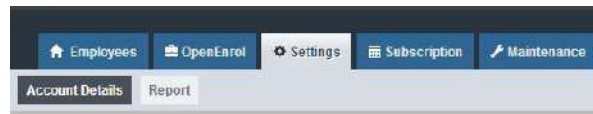
If an employee's email address changes, you must update it in the payroll software AND here, as it will not sync automatically when you publish payslips/P60s/P45s

## IRIS OpenEnrol

**IRIS OpenEnrol** is an element of the IRIS AE Suite™ detailed earlier in this guide.

## Settings

The **Settings** tab has two buttons on the top left, **Account Details** and **Report**.



When the **Settings** tab is selected it opens by default on the **Account Details** view.

**Account Details** shows the account administrator details. These can be updated by clicking the **Edit** button

From the **Report** button you can:

- Use the **Audit Log Report** to view a list of all actions taken within this account. Use the **Search** box to filter the results if required
- Select **Published Payslips History** to create a report showing the number of files uploaded per payroll company. Enter the relevant dates and click either **Data Export (.CSV)** or **Print View**
- Select **Changed Employee Emails** to view previous email addresses and what they have changed to

## Subscription

The **Subscription** tab has two sections, **Contract** and **Invoice History**.

- **Contract** displays your **Start Date** and **End Date** and other useful information
- Click on **Invoice History** to view, print or export invoices

## Maintenance

The **Maintenance** tab allows you to recall payslips that have been sent in error. You can recall **Payslips, P60s, P45s** and **Pensions** information by clicking on the relevant button at the top of the screen.

To recall a document:

1. Tick the box next to the relevant document or click the **Select All** box if you need to recall everything
2. Click the **Recall** button

This will remove the published document from the website, **it will not recall the actual sent email** (which in the case of Pensions includes a copy of the letter). If the employee tries to click on the link to the payslip/p60/P45 in their email, it will not work.

## What is IRIS OpenSpace?

The IRIS OpenSpace is a cloud solution allowing you to share documents with your clients. You are able to publish payroll reports 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
- Claim 1GB storage free (by entering your Customer Reference – contact Sales/Support for this)
- Easy access to E-Approvals and E-Checklist



## How to create an IRIS OpenSpace account

1. Visit the IRIS OpenSpace website [here](#)



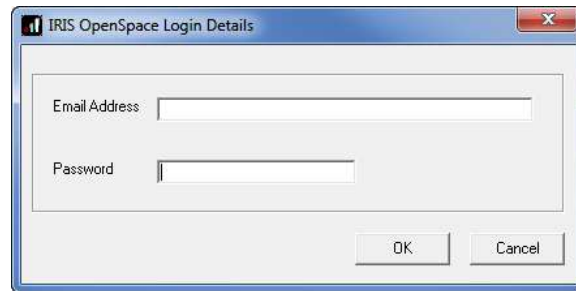
2. Click **Try Now** to open the following screen:

3. Enter the required details
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**

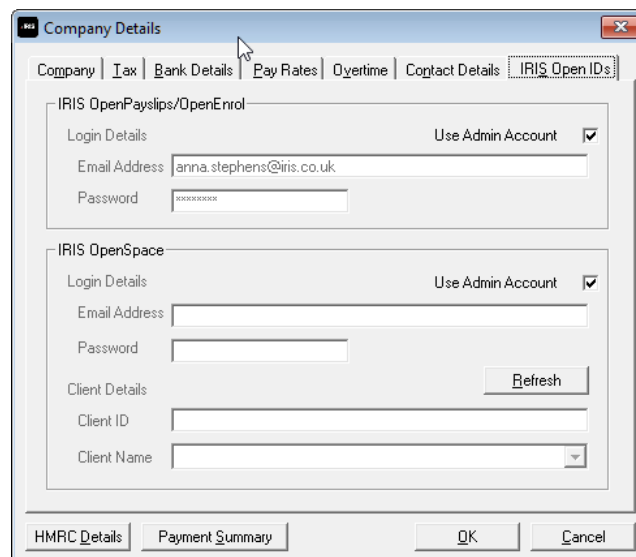
## How to update the payroll software

The **New Administrator - Email Address** needs to be added to the payroll software along with the relevant Client selected in **Company Details**.

1. Log into Admin, click on **File | Online Login Details | IRIS OpenSpace**
2. Enter the **Username** and **Password** registered on the IRIS OpenSpace website and click **OK**



3. Log back into the payroll and from the **Company** menu select **Alter Company Details** then click on the **IRIS Open IDs** tab
4. Click **Refresh** to populate the **Client Name** dropdown with the available clients in IRIS OpenSpace account. The **Client Name** list is in **Client ID** order



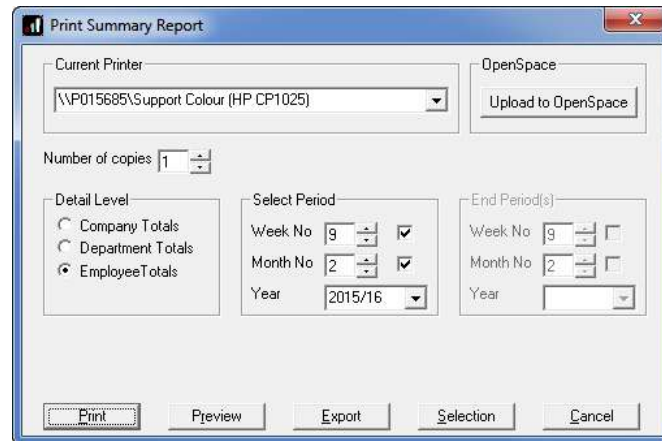
It is important to select the correct Client ID/Client Name here to prevent potentially publishing to the wrong client

5. Select the Client from the **Client Name** dropdown; this will automatically populate the **Client ID** with the Client ID configured in the IRIS OpenSpace Account. Then click **OK**

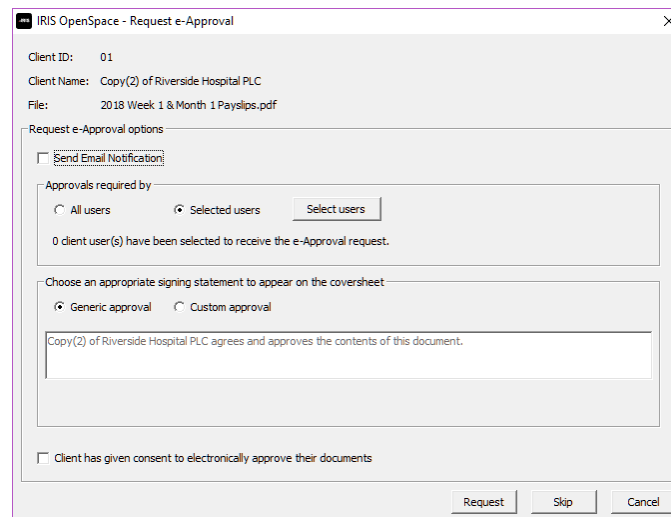
## How to publish reports to the IRIS OpenSpace portal

### Reports

1. Print the required report in Earnie™
2. If necessary change the period you wish to publish for
3. Click the **Upload to IRIS OpenSpace** button at the top right of the window



4. From the **IRIS OpenSpace – Request E-Approval** screen, select the required settings



5. Tick **Send email Notification** if you want an email notification to be sent to your client. This will be sent if they have **Receive Notifications** ticked in the client setup of IRIS OpenSpace
6. Select specific users to request approvals from by clicking **Selected Users** then the **Select Users button**
7. By default, **Generic approval** will be selected. If you want to customise the text, select **Custom Approval** and enter the required text – a maximum of 300 characters over 3 lines

8. To request electronic approval from your client, tick **Client has given consent to electronically approve their documents**
9. If you do not require approval for the documents, click **Skip**. The document will then not include a request for approval

## How to view the published documents

To view the published documents:

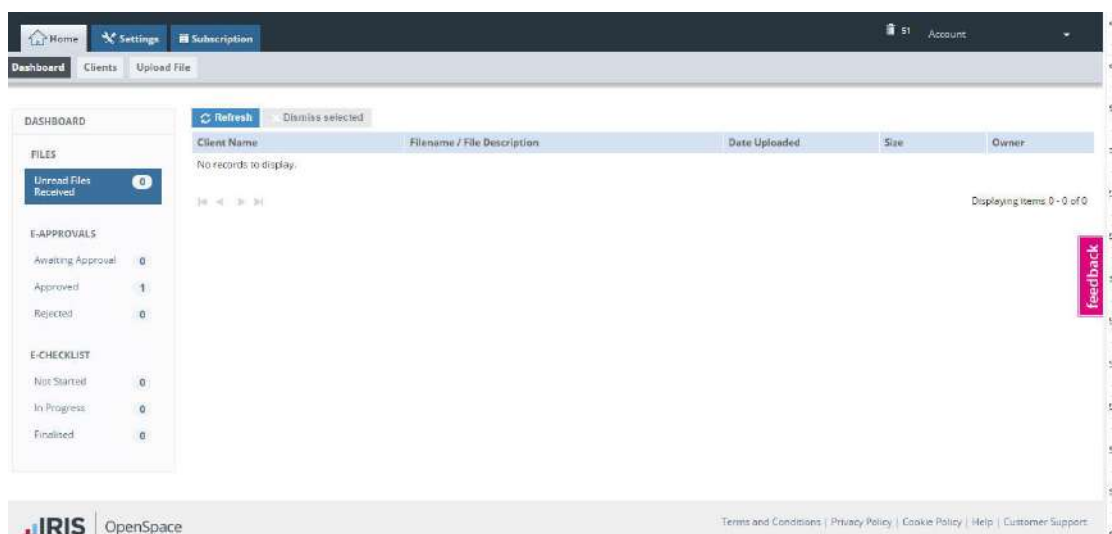
1. Go to the IRIS OpenSpace website at <https://www.irisopenspace.co.uk/Account/LogOn> and log in with the registered email address and password
2. From the **Dashboard**, choose from:
3. **Files** – Unread Files Received
  - **E-Approvals** – Awaiting Approval; Approved or Rejected
  - **E-Checklist** – Not Started; In Progress or Finalised\*

\*The E-Checklist is only used by IRIS Personal Tax software – for further details click [here](#)

4. Click on the relevant **Filename / File description**, this will download the document for you to view

## Managing the IRIS OpenSpace Account

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



The screenshot shows the IRIS OpenSpace dashboard interface. At the top, there are navigation tabs for Home, Settings, and Subscription. Below these are sub-tabs for Dashboard, Clients, and Upload File. The main content area is divided into a sidebar on the left and a main table area on the right. The sidebar contains sections for FILES (Unread Files Received: 0), E-APPROVALS (Awaiting Approval: 0, Approved: 1, Rejected: 0), and E-CHECKLIST (Not Started: 0, In Progress: 0, Finalised: 0). The main table area has a header with columns: Client Name, Filename / File Description, Date Uploaded, Size, and Owner. Below the header, it says 'No records to display.' and 'Displaying items 0 - 0 of 0'. There is a 'Refresh' button and a 'Dismiss selected' button above the table. A 'feedback' button is visible on the right side of the dashboard.

## 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**

## Files

1. To view a document, click on the **Name**, this will either open a folder containing documents or download the document for you to view
2. To upload a new document and send an email notification to the client, click **Upload File**, tick **Send email notification** and **Browse....** for the required report
3. For ease of administration, you can setup folders to store documentation – perhaps a folder for payslips. To add a folder, click **New Folder**. Tick the selection box next to the new folder and click **Edit**, here you can amend the folder name and add a description if required
4. To move a document to a folder, tick the selection box and then click **Move To**, select the folder you require and select **Move**. You can select multiple documents
5. To copy a document to a folder, tick the selection box and then click **Copy To**, select the folder you require and select **Copy**. You can select multiple documents

## e-Approval

This view shows all the documents 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.

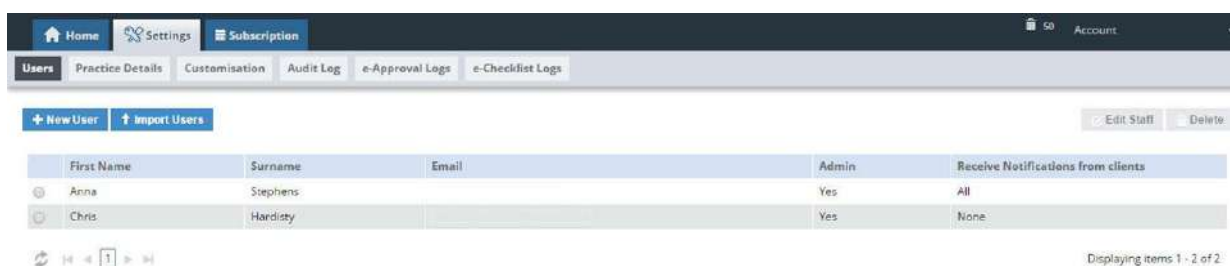
## e-Checklist

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. Click [here](#) for further information.

## Settings

The **Settings** tab has 6 tabs, **Users**, **Practice Details**, **Customisation**, **Audit Log**, **e-Approval Logs** and **e-Checklist Logs**.



	First Name	Surname	Email	Admin	Receive Notifications from clients
<input type="checkbox"/>	Anna	Stephens		Yes	All
<input type="checkbox"/>	Chris	Hardisty		Yes	None

Displaying items 1 - 2 of 2

When the **Settings** tab is selected it opens by default on the **Account Details** view.

**Account Details** shows the account administrator details. These can be updated by clicking the **Edit** button

## Users

From the **Users** button you can:

- View or Edit Staff
- Add new users
- Import users
- Delete users

## Practice Details

From the **Practice Details** button you can:

- Edit the Practice details
- Add/Edit or Delete your Default Folder Structure
- Apply amendments to your Default File Sort Order, choose from:
  - Uploaded time/date, most recent first
  - Latest Downloaded time/date, most recent first
  - Electronic approval status, required first
  - Alphabetically, ascending by name
  - Alphabetically, ascending by description

## Customisation

Here there are various options enabling you to build your own, personalised, client portal. Click **here** for further details.

## Audit Log

Here you can view and download actions carried out in IRIS OpenSpace such as:

- User Logged In
- User Logged Out
- File Deleted
- File Downloaded by User
- File Uploaded

This screen displays the **Date, User, Action, Client ID** and **Data**.

## e-Approval Logs

From this tab you can view documents for the relevant Client, the **Status**, for instance if approval has been requested or if the document has been approved and who it has been approved by.

## e-Checklist Logs

View here the log of e-Checklists, displaying the **Client ID, User, Name, Description** and date **Last Updated**.

## Subscription

The **Subscription** tab has two sections, **Your Subscription** and **Invoice History**.

- The **Your Subscription** section displays your **Status, Subscription Id, Subscription Cost, Created Date** and **IRIS Free Space**. You can update your **Subscription** here by purchasing additional storage, which you will be billed automatically for each month until you cancel it from this screen
- Click on **Invoice History** to view, print or export invoices. Links to the invoices are sent automatically after each monthly payment is taken