



OpenSpace

Client Guide

Version 1.1a

Waters & Atkinson

Chartered Accountants
Business Advisers & Tax Consultants



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Introduction

We have created an account for you on OpenSpace so that we can exchange documents instantly and securely.

With OpenSpace you can access your files from any location - just fire up an internet browser and login.

Improve business resilience; protect your company from disaster or weather-related disruption, all your files are stored securely off site so you can get access to them quickly and effectively.

We would advise you not to share your email address and Openspace password with anyone else as they will have access to your documents on Openspace.

This guide is to help you get started with using OpenSpace. If you require any further help please contact:

Laura Yates or Matthew Threlfall

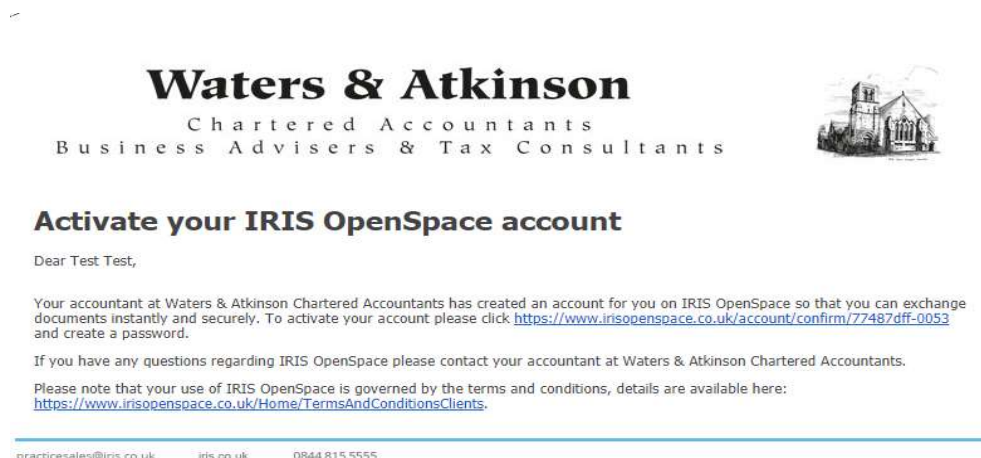
Tel: **01524 410727**



First Steps

Activating your account

We have sent you an email (pictured below) asking you to activate your account and allowing you to create your own password.



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

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The information contained in this e-mail, and any files transmitted with it, is confidential to the intended recipient(s). The dissemination, distribution, copying or disclosure of this message or its contents is prohibited unless authorised by the sender. If you receive this message in error, please immediately notify the sender and delete the message from your system. Although we have taken steps to ensure that this e-mail and attachments are free from any virus, we accept no responsibility for any virus they may contain. We advise you to scan all incoming messages and attachments on receipt. Please note that this e-mail has been created in the knowledge that internet e-mail is not a completely secure communication medium. We advise that you do not communicate with us by e-mail if you do not accept these risks.

Click on the link in the email, check the details and create a password. You will need to confirm the password. Once this is complete please click **Set Password**. You can change this password at any time. Your password is encrypted and securely stored on the IRIS OpenSpace website, no one has access to this password other than yourself.



Enter your chosen password

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

Email address	<input type="text" value="com@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"/>	

Your password must contain at least one letter, one special character and one number



You will see a confirmation screen once the password has been set.



Confirmation Success

Thank you, your confirmation succeeded.
Please log in by clicking the button below.

Login

Logging in

Once you have created your account you can log in from any computer with a web browser. Just visit www.irisopenspace.co.uk, enter your email address and password.

IRIS | OpenSpace

Email address

Password

Remember me?

[Forgot your password?](#)

[Need an account?](#)

Login [Find out more](#)

Once you log in for the first time you will be prompted to agree to the terms and conditions.



Forgotten Password

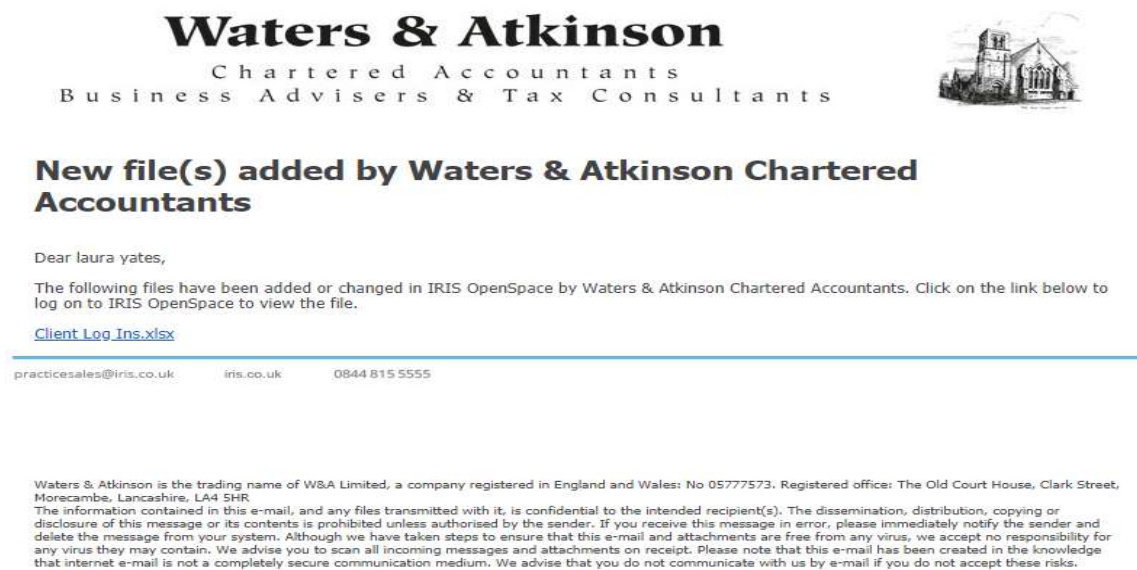
If you have forgotten your password please click the link **forgot your password** or visit <https://www.irisopenspace.co.uk/Account/PasswordReset> where you will be asked to enter the email address used when the account was created.

You will then receive an email with a unique link where you can create a new password.

Your password must contain at least one letter, one special character and one number

Notifications

When a file is sent to IRIS OpenSpace you will receive an email (pictured below)



You can access the file in a number of ways.

1. Click the link contained within the email
2. Visit the website and enter your log in details

Navigation



To e-sign documents go to the E-approvals section on your dashboard and click on Awaiting Approval.

DASHBOARD

FILES


Unread Files Received 0

APPROVALS

Awaiting Approval 34

Approved 24

Rejected 0



Now click the "Sign" button next the document you want to e-sign

[Refresh](#)

Client Name	Filename / File Description	Approval Type	Status	Last Updated	Requester
DUMMY TEST (ZDUMMY)	OpenSpace-User-Clients.pdf	e-Signature	Sign	04/07/2018	Laura Y



You are now taken to the document of which your e-signature is required on. Look for where it is indicated there is a signature required (will be in a blue box) by using the scroll bar at right hand side of the document. Click on the blue signature box:

Signature

04/07/2018



You will now be taken to the e-sign signature set up



Select which type of signature you want to use by selecting either:

Draw – this will require you using your mouse to draw your signature into the box indicated as below

Apply Signature 1/1

I hereby agree and digitally sign the Content.

Draw Text Upload

Clear

SIGN HERE

Text - you can type your signature as below

Apply Signature 1/1

I hereby agree and digitally sign the Content.

Draw Text Upload

Mr Dummy Test

Mr Dummy Test

Upload – If you already have a digital signature that you need to upload you can do it here. Just click Upload signature as below



Apply Signature 1/1

I hereby agree and digitally sign the Content.

Draw Text **Upload**

Upload Signature

Sign & Apply All Sign Cancel

Now click "sign and apply all" and this will sign

Apply Signature 1/1

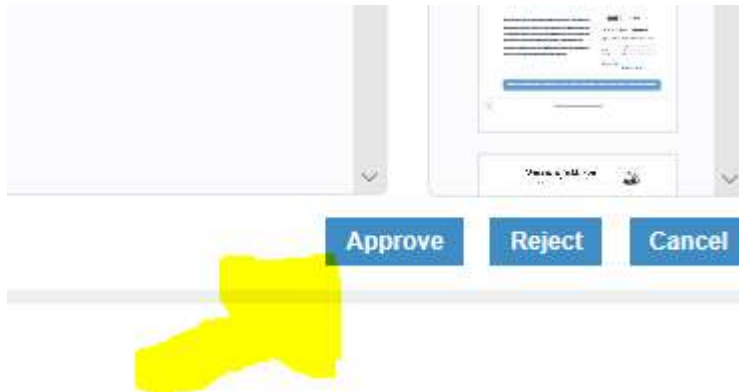
I hereby agree and digitally sign the Content.

Draw Text Upload

Clear

Sign & Apply All Sign Cancel

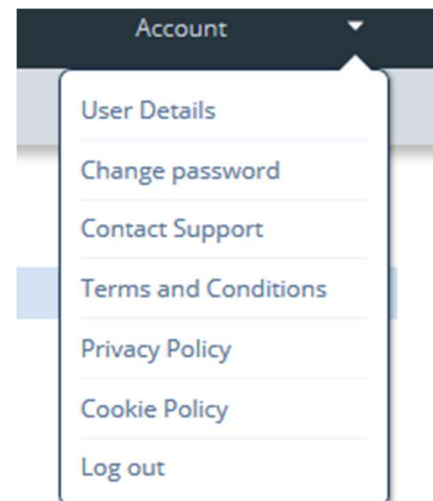
Now you are taken back to the main document. You now need to click approve at the very bottom righthand corner of the screen. If you can't see it use the scroll bar on the far-right side of the screen to scroll down to it



You have now e-signed your document

Changing your user details

You can change your email address, password at any time. These options are available at the top of each page. Click the word **account** or the arrow at the top of the screen to access the menu.



To change your email address

Click on **User Details** item from the menu

Enter your new email address and click **update**.

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

To change your password

Click on the **Change password** item from the menu

Enter your current password, new password and confirm the password then click **update**.

Your password must contain at least one letter, one special character and one number

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CHANGE PASSWORD

Use the form below to change your password.

Current password	<input type="password"/>	*
New password	<input type="password"/>	*
Confirm new password	<input type="password"/>	*

Change

Cancel

Where to find help

If you have any questions or need help please contact:

Laura Yates or Matthew Threlfall

Tel: 01524 410727