

# IRIS OPENSOURCE

Honey Barrett's Secure Online Portal

Client User Guide



# Contents

WHAT IS IRIS OPENSOURCE? .....	3
How do I get an account? .....	3
Where can I find the login page?.....	4
HOW DO I LOG IN? .....	5
HOW DO I LOG OUT?.....	6
NAVIGATING OPENSOURCE.....	7
HOW DO I UPDATE MY DETAILS? .....	10
How do I change my name or email address?.....	10
How do I change my password? .....	11
HOW TO UPLOAD DOCUMENTS.....	12
HOW TO VIEW DOCUMENTS FROM HONEY BARRETT .....	18
APPROVING DOCUMENTS .....	21
How do I e-approve documents? .....	21
How do I e-sign documents? .....	24
COMMON ISSUES AND QUICK FIXES .....	29
THINGS THAT HONEY BARRETT CANNOT DO ON BEHALF OF CLIENTS .....	30

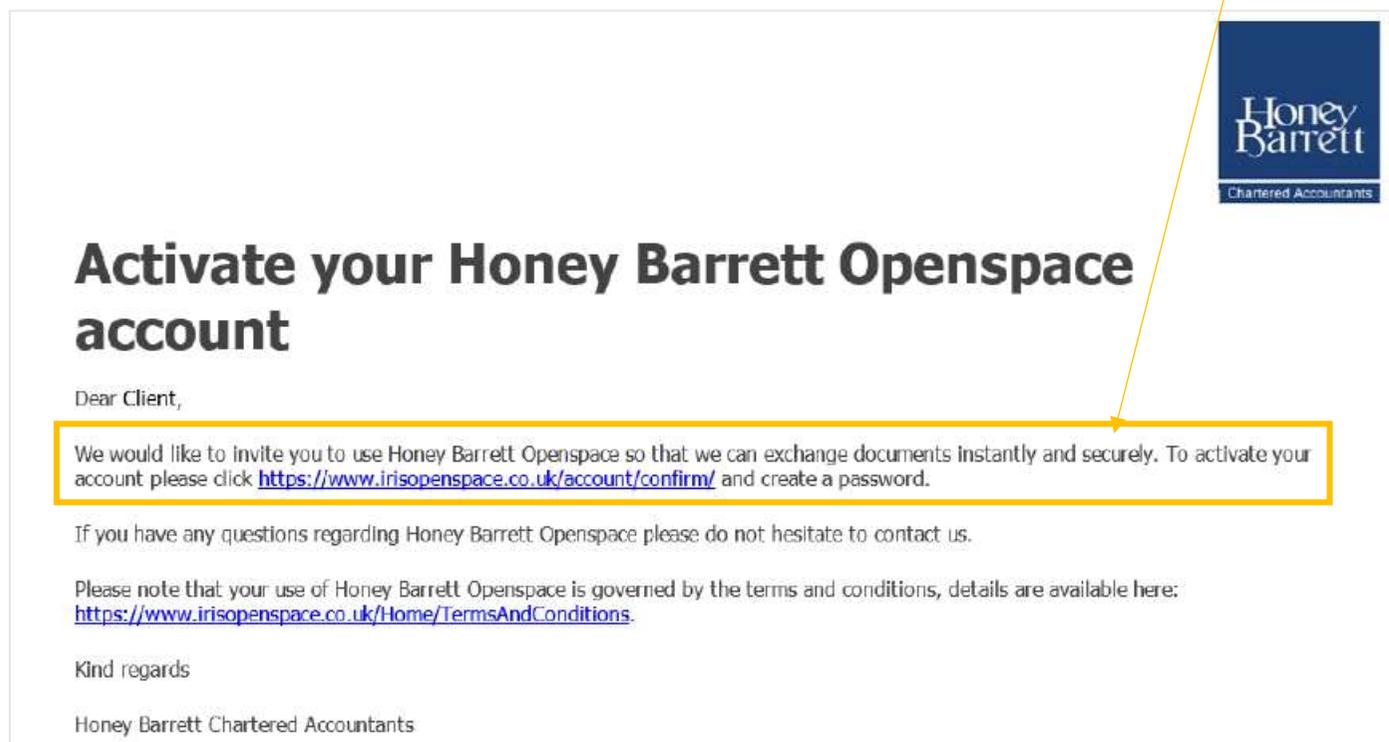
## WHAT IS IRIS OPENSOURCE?

IRIS OpenSpace is our secure online portal, which allows us to safely exchange documents with our clients, and also allows our clients to review and sign documents electronically. It is safer than sending information by email and is much quicker than using the post!

### How do I get an account?

If you are an existing client and do not already have an account, please get in touch with your usual Honey Barrett contact. If you are a new client and have an email address then we will create an account for you as part of our new client procedure.

When we set up your account, you will receive an email direct from IRIS OpenSpace containing a link to activate your account and create a password – see below.



To activate your account, simply click on the link in the email, check the details are correct and create a password. Your password is encrypted and securely stored on the Honey Barrett OpenSpace website. Only you will have access to your password. You can change your password at any time.

Once you have created and confirmed your password, you'll see a 'confirmation successful' message. In order to complete the activation, click on 'login'. We will receive an automatic notification when you have done so.

Your username will be your email address and you will be able to set your own password. If you are ever unsure of your password, go to the log in page and click on 'forgot your password?' to reset it. *We cannot reset passwords from our end.*

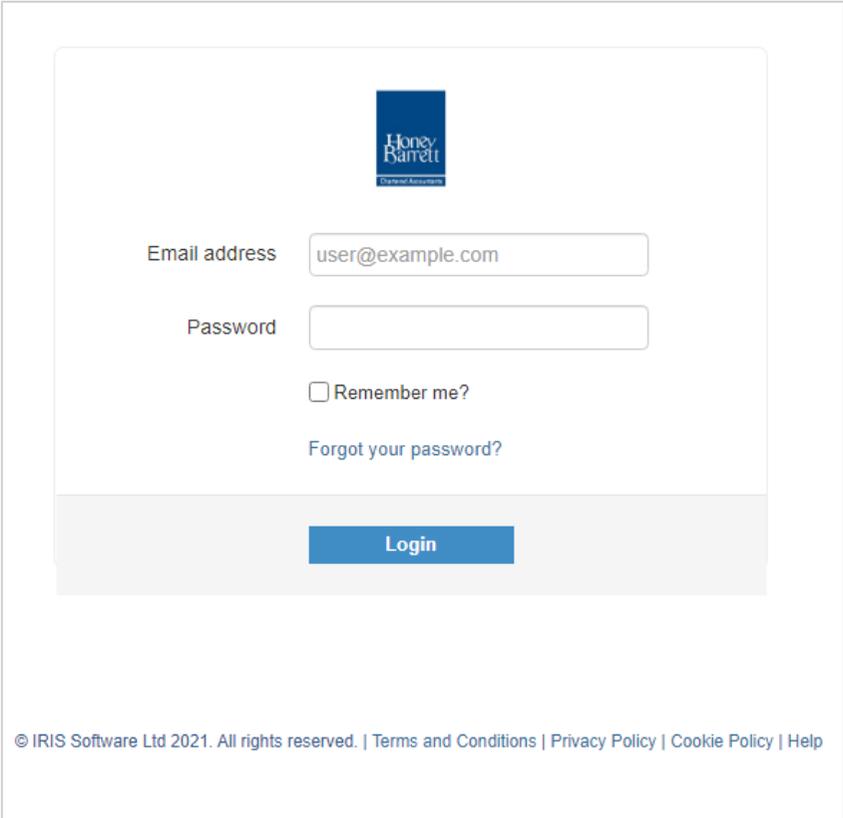
Where can I find the login page?

You can log into your OpenSpace account here - <https://honeybarrett.irisopenspace.co.uk/>. There is also a link to OpenSpace in the top right corner of our website homepage - <https://www.honeybarrett.co.uk/>.

## HOW DO I LOG IN?

1. You can log into your OpenSpace account here - <https://honeybarrett.irisopenspace.co.uk/>.
2. There is also a link to OpenSpace in the top right corner of our website homepage - <https://www.honeybarrett.co.uk/>.
3. If you receive an email notification that we have uploaded something for you to review then you can click on the link in that email to log in.

Whichever way you access OpenSpace, you'll be taken to this screen –

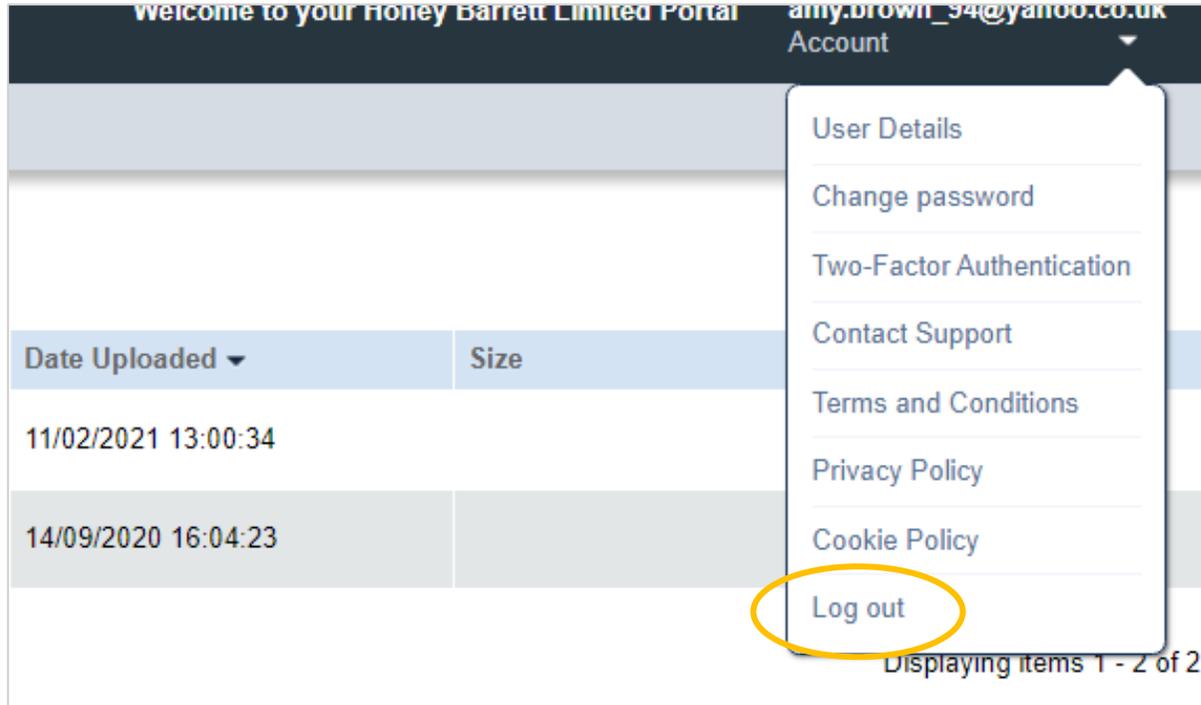


The screenshot shows a login form for Honey Barrett. At the top center is the Honey Barrett logo, which consists of a blue square with the text 'Honey Barrett' and 'Clinical Assessment' below it. Below the logo are two input fields: 'Email address' with the placeholder text 'user@example.com' and 'Password'. Below the password field is a checkbox labeled 'Remember me?'. Below the checkbox is a link that says 'Forgot your password?'. At the bottom of the form is a blue button labeled 'Login'. At the very bottom of the page, there is a footer that reads: '© IRIS Software Ltd 2021. All rights reserved. | Terms and Conditions | Privacy Policy | Cookie Policy | Help'.

Your username will be your email address and you will be able to set your own password. If you are ever unsure of your password, go to the log in page and click on 'forgot your password?' to reset it. *We cannot reset passwords from our end.*

## HOW DO I LOG OUT?

Click on the arrow by your email address and account in the top right corner. The log out option is at the bottom of the drop down list.



Welcome to your Honey Barrett Limited Portal amy.brown\_94@yahoo.co.uk  
Account

- User Details
- Change password
- Two-Factor Authentication
- Contact Support
- Terms and Conditions
- Privacy Policy
- Cookie Policy
- Log out

Date Uploaded ▼	Size
11/02/2021 13:00:34	
14/09/2020 16:04:23	

Displaying items 1 - 2 of 2

# NAVIGATING OPENSOURCE

You can log into OS by clicking on the link in an email notification (in which case you're likely to be directed straight to the uploaded document), or by following this link – <https://honeybarrett.irisopenspace.co.uk/>. If you login via this link, you'll either be taken straight to your dashboard or to a homepage if you have multiple accounts (e.g. a personal and company account). If the latter, the homepage will look like the example below. Click on the name of whichever account you need to access.

Home | Welcome to your Honey Barrett Limited Portal | amy.brown\_94@yahoo.co.uk Account

Dashboard | Your Files

Client ID	Client Name	Accountant Name	Status	Last Login	Total Files	Size
	Amy Brown Test	Honey Barrett Limited	Active	17/02/2021 17:36:55	2 files	86 KB
NC311D	Amy Ruth Brown	Honey Barrett Limited	Active	17/02/2021 17:36:55	3 files	282 KB

Displaying items 1 - 2 of 2

Below shows the dashboard, which automatically shows any unread files. In the example below there are 3 unread files, the file names, which folder they're stored in, when they were uploaded and who at Honey Barrett uploaded the file (owner column).

DASHBOARD | Refresh

FILES

- Unread Files Received **3**
- All Files

APPROVALS

- Awaiting Approval **2**

INVOICES

- Unpaid **0**

E-CHECKLIST

- e-Checklists **0**

Client Name	Filename / Folder	Date Uploaded	Size	Owner
Amy Ruth Brown (NC311D)	Document to be e-approved.pdf Files From Honey Barrett Limited	11/02/2021 17:26:09	92 KB	Amy Brown
Amy Ruth Brown (NC311D)	Amy B courier slip.pdf Files From Honey Barrett Limited	11/02/2021 13:00:34	101 KB	Amy Brown
Amy Brown Test ()	Amy Brown Help to Buy ISA Full statement - Nationwide Internet Bank.pdf Files From Honey Barrett Limited	14/09/2020 16:04:23	61 KB	Amy Brown

Displaying items 1 - 3 of 3

You can navigate OpenSpace using the dashboard options down the left hand side, and also by using the tabs at the top left. If you need to get back to the homepage, click on the 'home' tab at the top left of the screen.

Home | Dashboard | Your Files | Upload File

Welcome to your Honey Barrett Limited Portal | amy.brown\_94@yahoo.co.uk Account

**DASHBOARD**

**FILES**

- Unread Files Received **3**
- All Files**

**APPROVALS**

- Awaiting Approval **2**

**INVOICES**

- Unpaid **0**

Enter Client Name or ID or File Name or Owner

<input type="checkbox"/>	Client Name	File Name / Folder	Uploaded Date	Approval Type	Status	Size	Owner
<input type="checkbox"/>	NC311D (Amy Ruth Br...)	Document to be e-signed.pdf Files From Honey Barrett Limited	11/02/2021 17:42	e-Signature	<b>Sign</b>	89 KB	Amy Brown
<input type="checkbox"/>	NC311D (Amy Ruth Br...)	Document to be e-approved.pdf Files From Honey Barrett Limited	11/02/2021 17:26	e-Approval	<b>Approve</b>	92 KB	Amy Brown
<input type="checkbox"/>	NC311D (Amy Ruth Br...)	Amy B courier slip.pdf Files From Honey Barrett Limited	11/02/2021 13:00			101 KB	Amy Brown
<input type="checkbox"/>	(Amy Brown Test)	Driving Licence - Amy Brown.pdf Top Level	01/02/2021 10:18			25 KB	Amy Brown Test
<input type="checkbox"/>	(Amy Brown Test)	Amy Brown Help to Buy ISA Full statement - Nation... Files From Honey Barrett Limited	14/09/2020 16:04			61 KB	Amy Brown

Download | Notify | Delete

Displaying items 1 - 5 of 5 | 25 | 50 | 100

To view all documents, click on 'all files' in the down the left hand side in the dashboard box (see above). This also shows any documents awaiting approval, which you can see in the 'Status' column.

To quickly see if there are any documents awaiting approval, click on 'Awaiting Approval' down the left hand side.

Home  Welcome to your Honey Barrett Limited Portal amy.brown\_94@yahoo.co.uk Account

Dashboard Your Files Upload File

DASHBOARD

FILES

Unread Files Received 3

All Files

APPROVALS

Awaiting Approval 2

[Refresh](#)

Client Name	Filename / Folder	Approval Type	Status	Last Updated ▲	Requested By
Amy Ruth Brown (NC311D)	Document to be e-approved.pdf Files From Honey Barrett Limited	e-Approval	<a href="#">Approve</a>	11/02/2021	Amy Brown
Amy Ruth Brown (NC311D)	Document to be e-signed.pdf Files From Honey Barrett Limited	e-Signature	<a href="#">Sign</a>	11/02/2021	Amy Brown

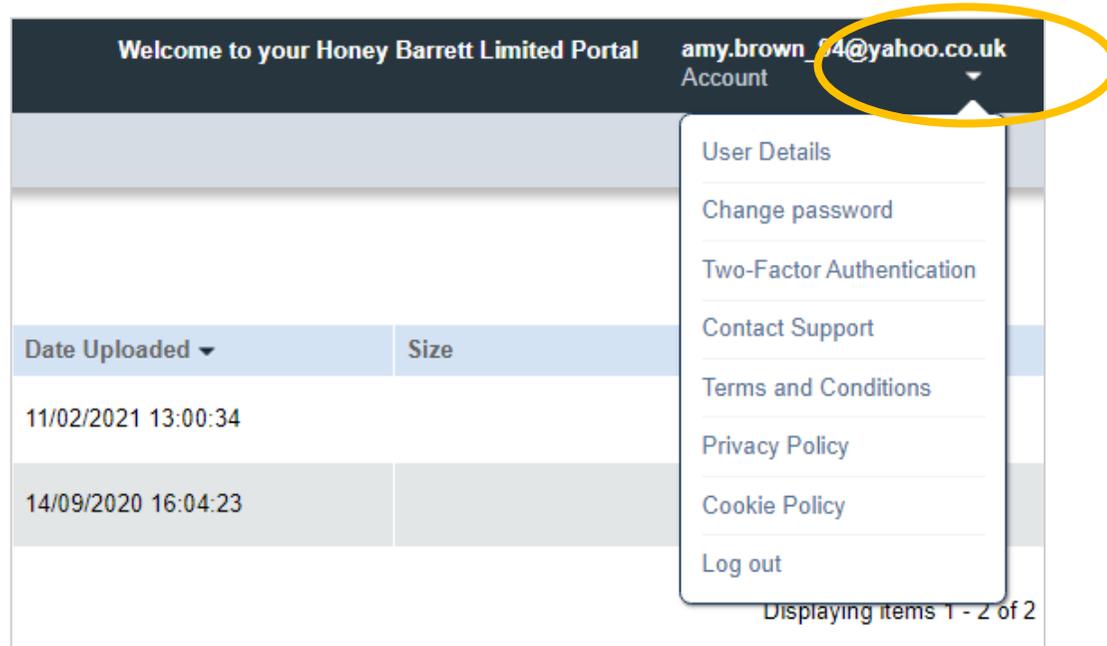
« 1 »

Displaying items 1 - 2 of 2

# HOW DO I UPDATE MY DETAILS?

## How do I change my name or email address?

You can change your email address or password at any time. Log into OpenSpace and click on the arrow under where it shows your email address and account in the top right corner.

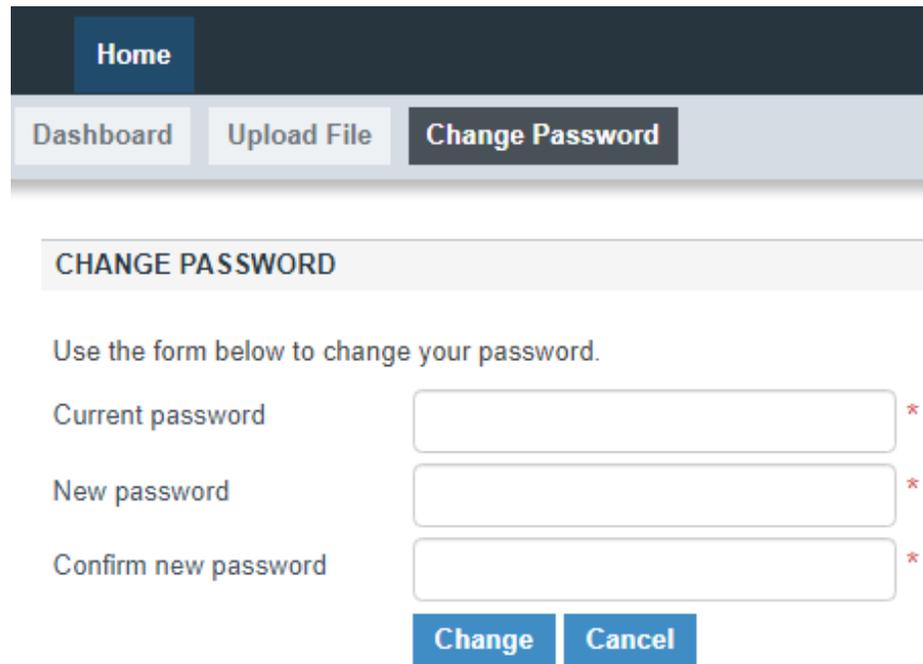


If you need to update your name or email address, click on 'user details'. You'll be taken to the screen below where you can edit your name and email address. Click on 'update' when done.

The screenshot shows the 'User Details' form in the portal. The form has a navigation bar with 'Home', 'Dashboard', 'Upload File', and 'User Details'. The 'User Details' section contains the following fields: First Name (Amy), Surname (Brown Test), Job Title (empty), and E-mail Address (amy.brown\_94@yahoo.co.uk). There is an 'Edit' link next to the E-mail Address field. Below the fields, a note states: '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.' At the bottom, there are 'Update' and 'Cancel' buttons.

## How do I change my password?

If you need to change your password, click on 'change password' and click on 'change' when done. The system will flag if your password doesn't meet the requirements for a strong password.



The screenshot shows a web application interface with a dark blue header containing a 'Home' button. Below the header is a navigation bar with 'Dashboard', 'Upload File', and 'Change Password' buttons. The 'Change Password' button is highlighted. Below the navigation bar is a section titled 'CHANGE PASSWORD'. The instructions read: 'Use the form below to change your password.' The form consists of three input fields: 'Current password', 'New password', and 'Confirm new password', each with a red asterisk to its right. At the bottom of the form are two buttons: 'Change' and 'Cancel'.

### Too Short

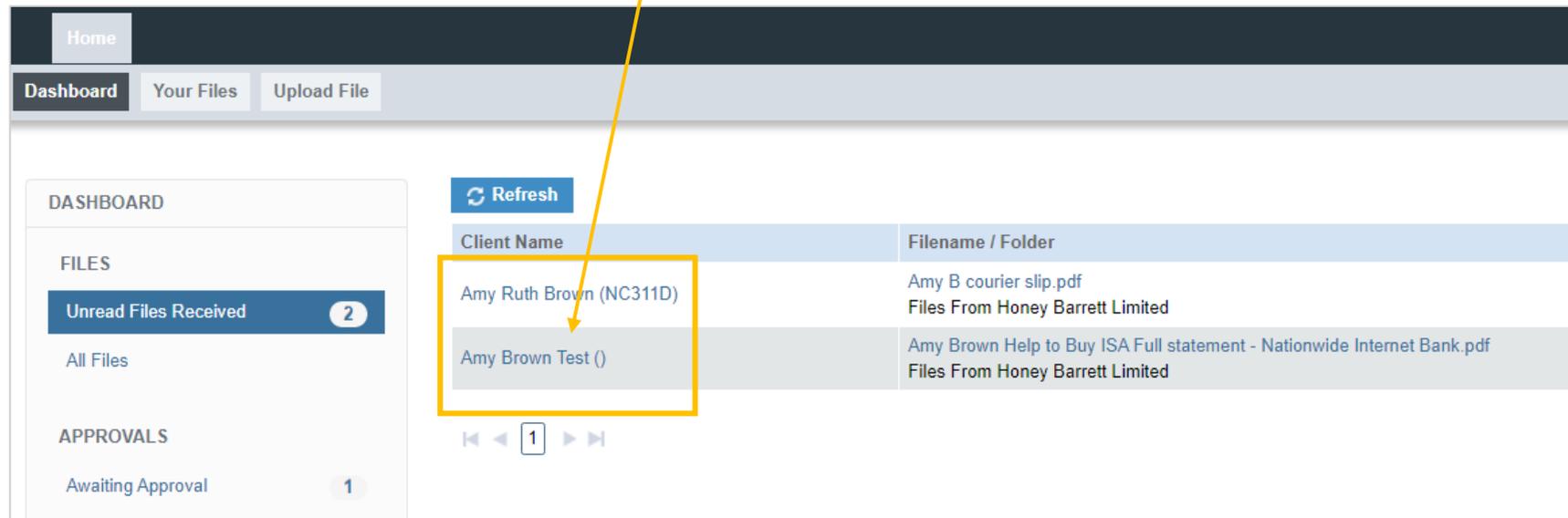
- 8 or more characters
- Contains lowercase
- Contains uppercase
- Contains special characters
- Contains numbers

# HOW TO UPLOAD DOCUMENTS

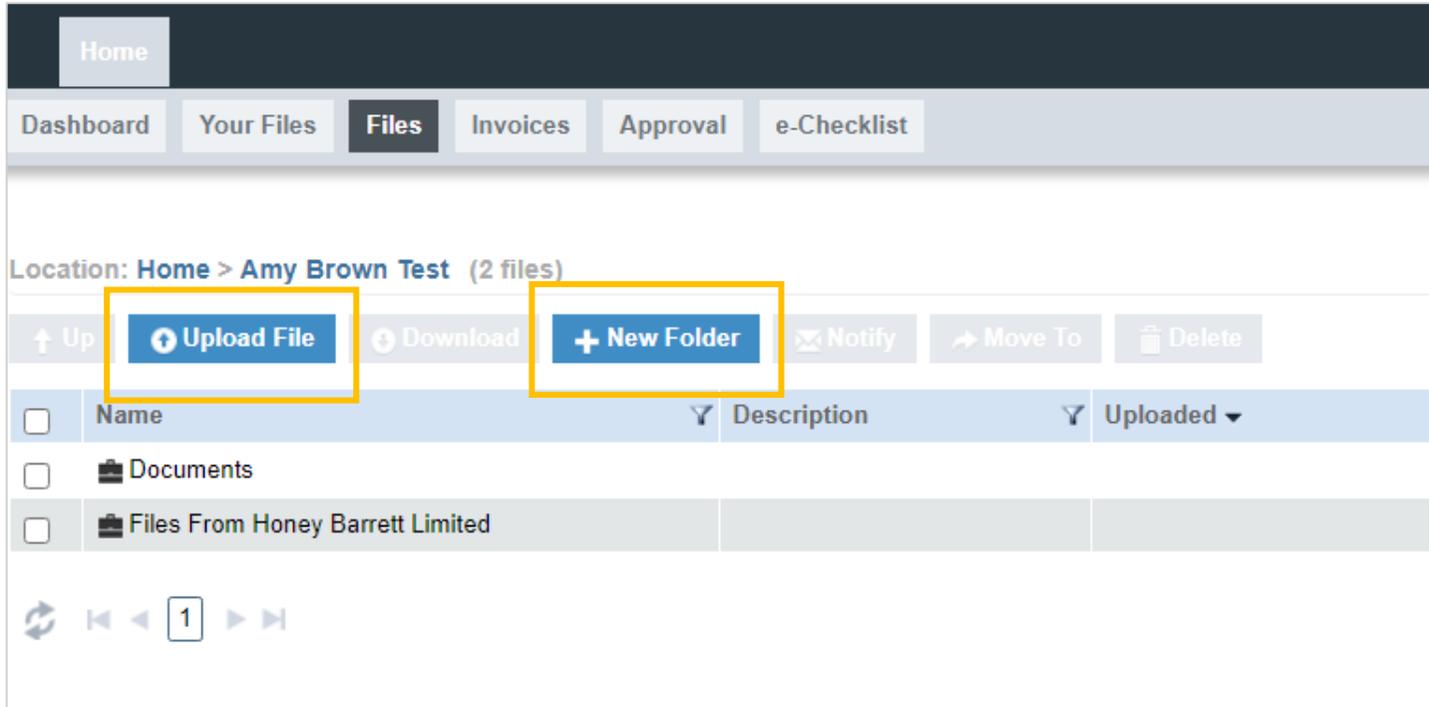
A few things to remember –

- Please do not create multiple folders within OpenSpace (this can make it difficult for our admin team to locate and retrieve your documents). If you would like to create a single '2020-21 Tax Return information' folder and put all your documents in there, for example, that is fine.
- Please name documents clearly.

1. Log into your OpenSpace account - <https://honeybarrett.irisopenspace.co.uk/>. You'll be taken to the homepage. If you have more than one account, you may need to click on the name of the account you'd like to access.



2. Click on the blue 'upload file' box found on the left side of the screen.



3. A box will then appear which will allow you to upload your documents. There are two ways in which to do this:
- Dragging and dropping your files from your computer and into the box.
  - Clicking on 'add files' in the bottom left corner of the box (recommended).

*You may find it helpful to have all your documents ready in one folder on your computer as this allows for a simpler upload.*

If you would like to create a folder to hold your current year tax documents for example, simply click on 'new folder'. You can name the new folder anything you like but please do not create multiple folders.

**Upload to Amy Brown Test**  
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
 Documents	25 KB
 Files From Honey Barrett Limited	61 KB

🔄 ⏪ 1 ⏩

Displaying items 1 - 2 of 2

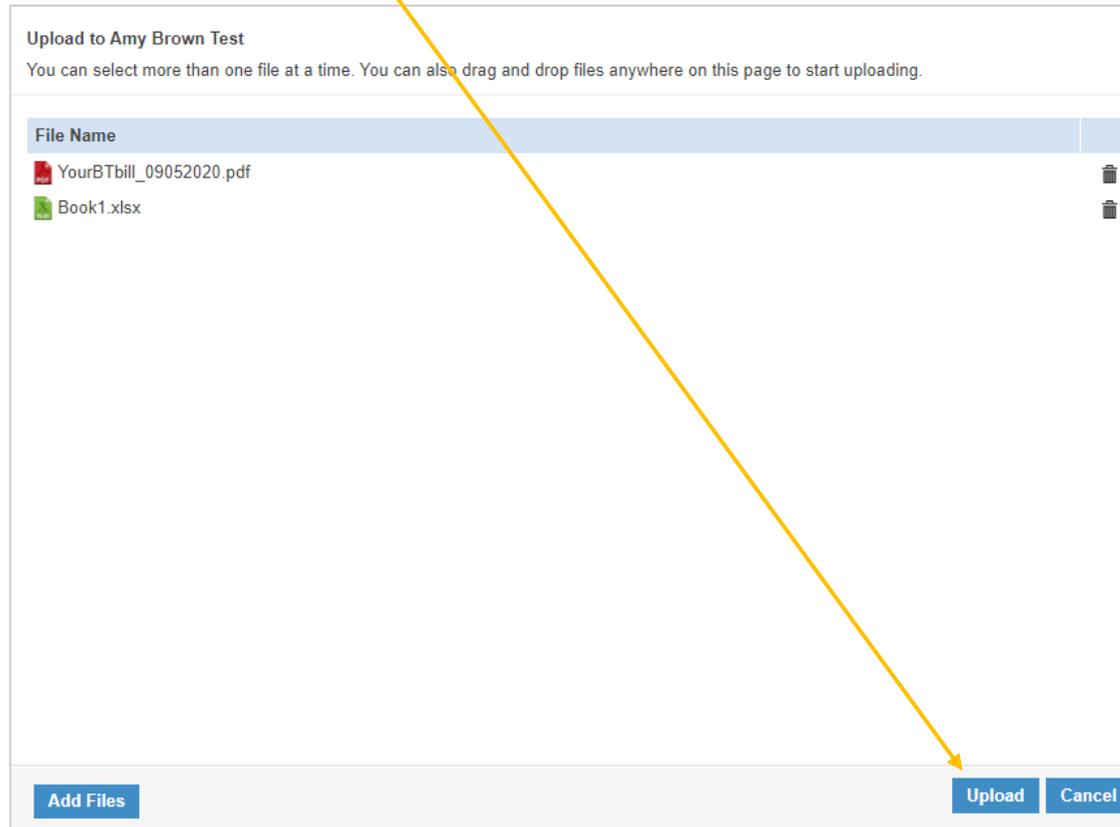
  
Drag & Drop files here, into the folder directly.  
or by clicking on "Add Files" below.

**Add Files** **Cancel**

4. You can either upload files to the main folder, or you can click on the 'documents' folder to add your files there, whichever is easiest for you.

Please do not create multiple folders within OpenSpace as this makes it very difficult for our admin team to locate and retrieve your documents, especially if information isn't sent in one batch or on the same day.

5. Click on 'add files' and another box should appear which will allow you to find and select the documents that you would like to upload. Once selected, click on 'open'.
6. Your documents will then appear in a list (see example below).
7. Once you've added everything you need to, click on 'upload' in the bottom right corner of the box. *You may need to scroll down to the bottom of the screen to see the 'upload' button.*



8. It may take a few seconds for the documents to upload and if you are uploading a lot of documents, you may notice a circle swirling round – this is just the system processing so just give it a minute and it will upload them all.
9. Once the documents have uploaded you'll be taken back to the 'files' section and there should be a green message 'document(s) uploaded successfully.'

10. You can see in this example that the two documents uploaded are sitting in the main folder. If you chose to upload directly to the 'documents' folder then that is where you will find them.

Document(s) uploaded successfully.

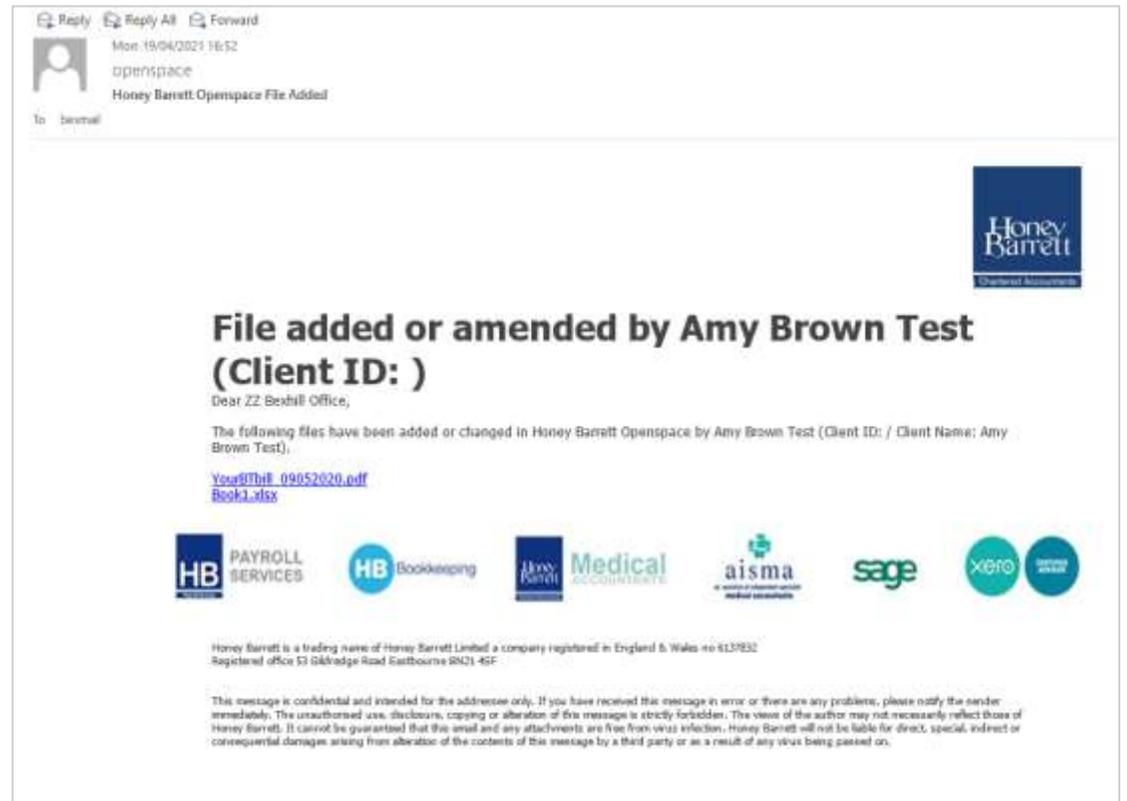
Location: Home > Amy Brown Test (2 files)

Upload File Download New Folder Refresh Move To Delete

Name	Description	Uploaded	Latest Download	Approval Type	Status	Total Files	Size	Owner
Documents						1 files	25 KB	
Files From Honey Barrett Limited						1 files	51 KB	
Book1.xlsx		19/04/2021 16:51:42					10 KB	Amy Brown Test
YourBTTB_09052020.pdf		19/04/2021 16:51:41					394 KB	Amy Brown Test

Displaying items 1 - 4 of 4

11. Every time you upload information to your OpenSpace account, we will receive an email notification (see below for an example). These emails are checked regularly throughout each day and we will go into your account from our end and retrieve the information.



# HOW TO VIEW DOCUMENTS FROM HONEY BARRETT

There are two ways in which you can access documents that Honey Barrett have uploaded to your account.

## 1. Click on 'all files' in the dashboard box down the left hand side of the screen.

- This will show all the documents that are held within your account(s).
- If you have multiple accounts (e.g. personal and company) then you will see documents from all these accounts here. You can see an example of this below where there are two client names – Amy Brown Test and NC311D Amy Ruth Brown.
- You can see in the second column 'file name / folder' where each document is saved.

Files from Honey Barrett Limited folder – this is where documents that Honey Barrett upload can be found.

Documents folder – this is where you can choose to put your documents when you upload them.

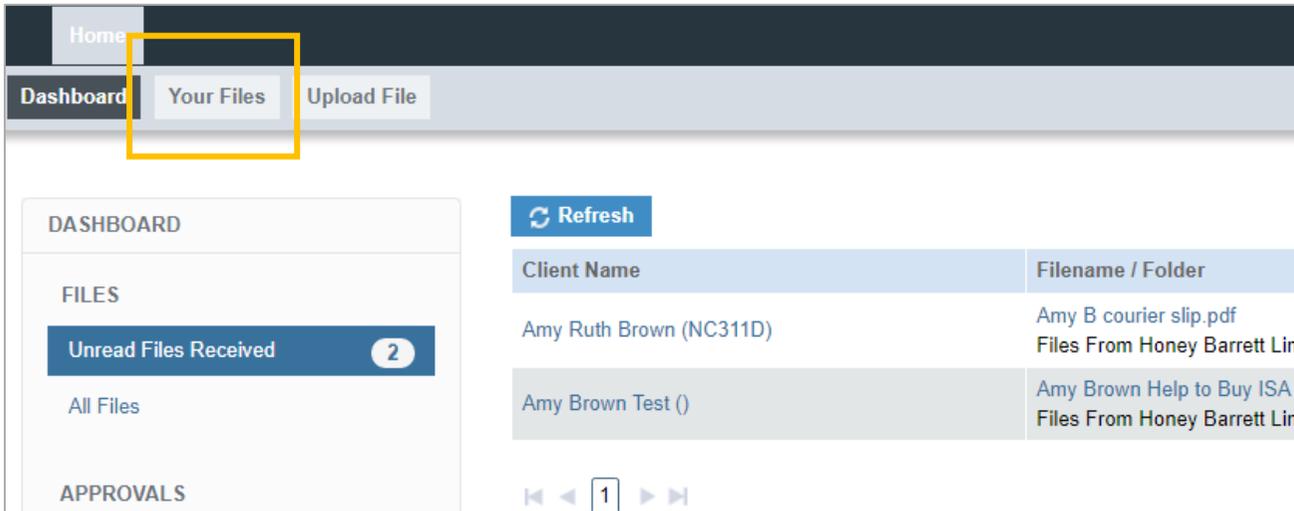
Top level folder – this is where your documents will sit if you do not choose to upload to the documents folder.

The screenshot shows the Honey Barrett dashboard interface. On the left, a sidebar menu is visible with the following sections: DASHBOARD, FILES (with sub-items 'Upload Files Received' showing 2 and 'All Files' which is highlighted), APPROVALS (with 'Awaiting Approval' showing 1), INVOICES (with 'Unpaid' showing 0), and E-CHECKLIST (with 'e-Checklists' showing 0). The main content area displays a table of documents. The table has columns: Client Name, File Name / Folder, Uploaded Date, Approval Type, Status, Size, and Owner. The first two rows are highlighted with orange boxes. The first row shows a client named '(Amy Brown Test)' with a file named 'Book1.xlsx' in the 'Top Level' folder, uploaded on 19/04/2021 at 16:51, with a size of 10 KB and owner 'Amy Brown Test'. The second row shows the same client with a file named 'Year11 Bill\_30/05/2020.pdf' in the 'Top Level' folder, uploaded on 19/04/2021 at 16:51, with a size of 394 KB and owner 'Amy Brown Test'. Other rows include documents from 'NC311D (Amy Ruth Brown)' and 'Amy Brown Test' with various file names and statuses like 'Signed (16/02/21)', 'Approved (16/02/21)', and 'Approve'. At the bottom right, it says 'Displaying Items 1 - 6 of 6' with pagination options for 25, 50, and 100 items.

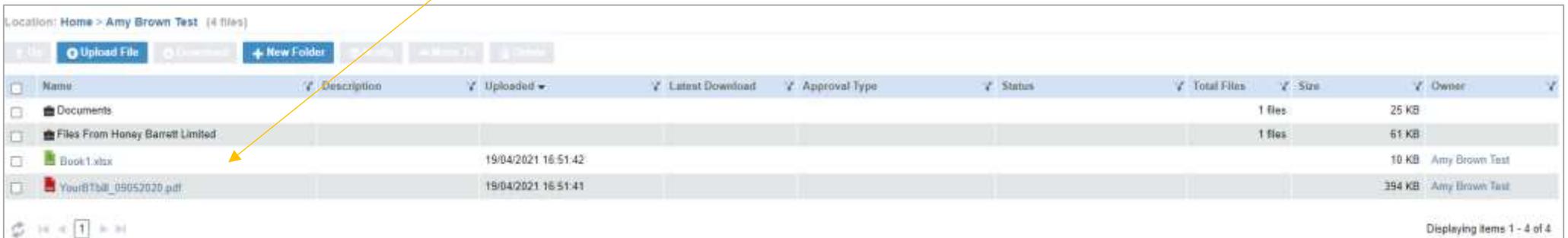
Client Name	File Name / Folder	Uploaded Date	Approval Type	Status	Size	Owner
(Amy Brown Test)	Book1.xlsx Top Level	19/04/2021 16:51			10 KB	Amy Brown Test
(Amy Brown Test)	Year11 Bill_30/05/2020.pdf Top Level	19/04/2021 16:51			394 KB	Amy Brown Test
NC311D (Amy Ruth Brown)	Driving Licence - Amy Brown.pdf Top Level	30/03/2021 16:27			25 KB	Amy Brown Test
NC311D (Amy Ruth Brown)	Document to be e-signed.pdf Files From Honey Barrett Limited	11/02/2021 17:42	e-Signature	Signed (16/02/21)	89 KB	Amy Brown
NC311D (Amy Ruth Brown)	Document to be e-approved.pdf Files From Honey Barrett Limited	11/02/2021 17:26	e-Approval	Approved (16/02/21)	92 KB	Amy Brown
NC311D (Amy Ruth Brown)	Amy B courier slip.pdf Files From Honey Barrett Limited	11/02/2021 13:00	e-Approval	Approve	101 KB	Amy Brown
(Amy Brown Test)	Driving Licence - Amy Brown.pdf Documents	01/02/2021 10:18			25 KB	Amy Brown Test
(Amy Brown Test)	Amy Brown Help to Buy ISA Full statement - Nationwide Internet Bank.pdf Files From Honey Barrett Limited	14/05/2020 16:04			61 KB	Amy Brown

2. Click on 'your files' along the top left of the screen.

- Then click on the 'client name' (name of the account) that you'd like to view.



- You can see below that the two documents are sitting in the 'top level' folder.



- Click on the 'documents' folder to view files that you have uploaded.
- Click on 'Files from Honey Barrett Limited' to view files that we have uploaded for you to review and / or action. – see example below of what the folder contents may look like.

Home

Dashboard Your Files **Files** Invoices Approval e-Checklist

Location: Home > Amy Ruth Brown (4 files) > Files From Honey Barrett Limited

<input type="checkbox"/>	Name	Description	Uploaded	Latest Download	Approval Type	Status
<input type="checkbox"/>	Document to be e-signed.pdf	Document to be e-signed.pdf	11/02/2021 17:42:05	16/02/2021 16:18:08	e-Signature	<input type="button" value="Signed (16/02/21)"/>
<input type="checkbox"/>	Document to be e-approved.pdf	Document to be e-approved...	11/02/2021 17:26:09	16/02/2021 12:52:15	e-Approval	<input type="button" value="Approved (16/02/21)"/>
<input type="checkbox"/>	Amy B courier slip.pdf	Amy B courier slip.pdf	11/02/2021 13:00:34		e-Approval	<input type="button" value="Approve"/>

Please note that the system does not necessarily show documents in the order in which they were uploaded to OpenSpace.

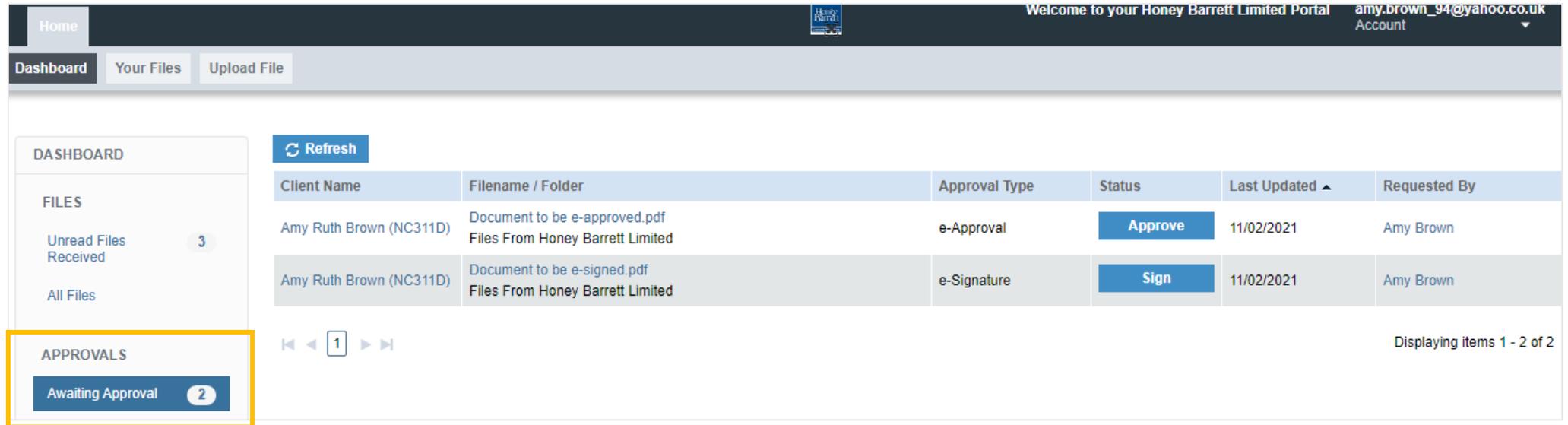
You can change the order by clicking on the filter icon in the 'uploaded' column heading. Click on the icon until the documents are shown with the most recently uploaded document at the top. This will help you to see when documents were uploaded more easily.

# APPROVING DOCUMENTS

There are two ways in which we may ask you to approve a document electronically via OpenSpace: e-approval or e-signature.

## How do I e-approve documents?

1. Go to the dashboard tab and click on 'awaiting approval' and this will bring up the screen below.

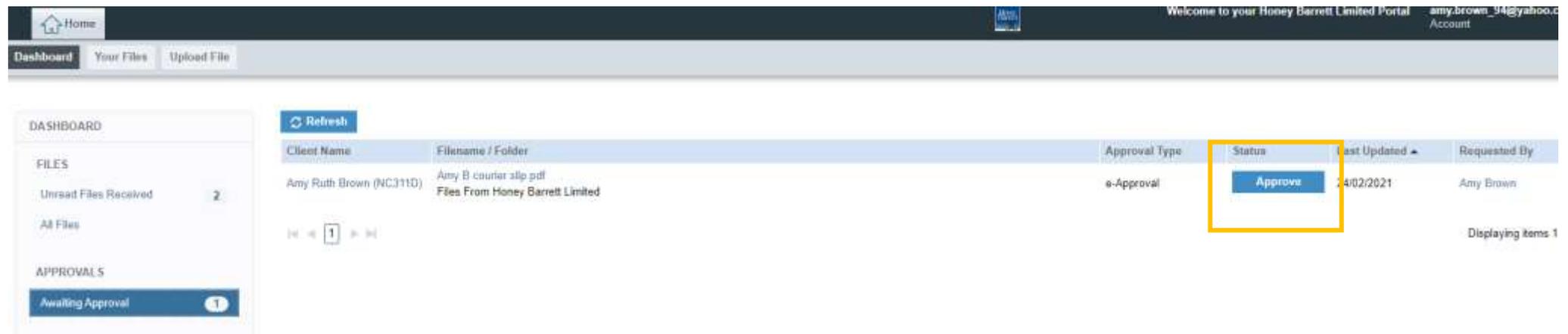


The screenshot shows the Honey Barrett Limited Portal dashboard. The top navigation bar includes 'Home', 'Dashboard', 'Your Files', and 'Upload File'. The user is logged in as 'amy.brown\_94@yahoo.co.uk'. The dashboard has a sidebar with 'DASHBOARD', 'FILES' (Unread Files Received: 3, All Files), and 'APPROVALS' (Awaiting Approval: 2). The main content area features a 'Refresh' button and a table of documents:

Client Name	Filename / Folder	Approval Type	Status	Last Updated ▲	Requested By
Amy Ruth Brown (NC311D)	Document to be e-approved.pdf Files From Honey Barrett Limited	e-Approval	Approve	11/02/2021	Amy Brown
Amy Ruth Brown (NC311D)	Document to be e-signed.pdf Files From Honey Barrett Limited	e-Signature	Sign	11/02/2021	Amy Brown

Navigation controls at the bottom of the table show '1' and 'Displaying items 1 - 2 of 2'.

2. Click on the document to be approved to download it. *You will need to open the document before the system will allow you to e-approve / e-sign.*
3. Once you have read through the document, close it and you'll be taken back to the document list.
4. Go across to the status column and click on 'approve' which is in a blue box.

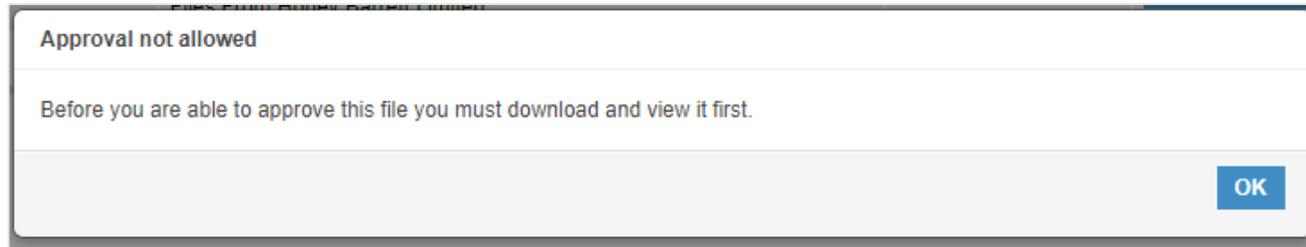


The screenshot shows the Honey Barrett Limited Portal dashboard with a document selected for approval. The sidebar shows 'APPROVALS' (Awaiting Approval: 1). The main content area features a 'Refresh' button and a table of documents:

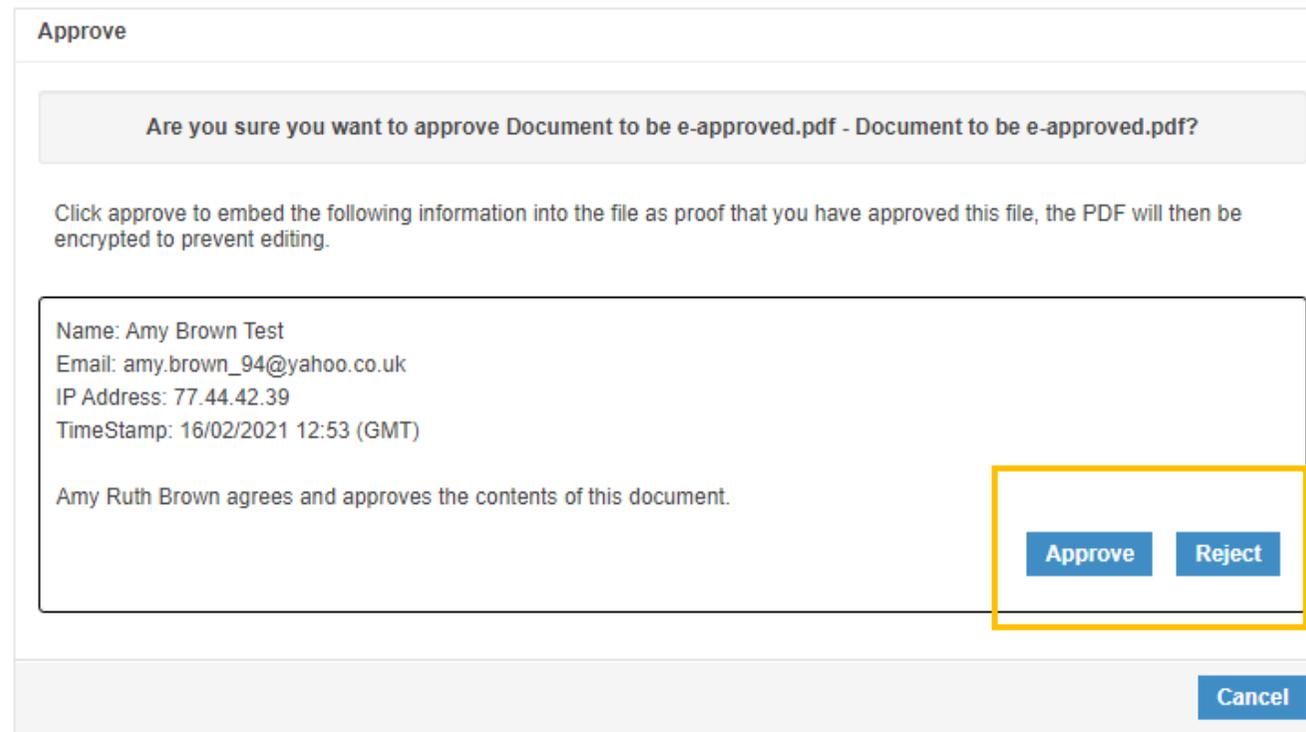
Client Name	Filename / Folder	Approval Type	Status	Last Updated ▲	Requested By
Amy Ruth Brown (NC311D)	Amy B courier slip.pdf Files From Honey Barrett Limited	e-Approval	Approve	24/02/2021	Amy Brown

The 'Approve' button in the Status column is highlighted with a yellow box. Navigation controls at the bottom of the table show '1' and 'Displaying items 1'.

5. If you haven't already viewed the document, a message box will pop up prompting you to view it first. You will then need to click ok and download the document.



6. Otherwise, if you have already looked through the document then after clicking approve this next box will appear, and you will then need to click on 'approve' or 'reject' as applicable.



7. The document will then disappear from the awaiting approval page. Under the 'all files' page, it will then show as approved and the date approved.

The screenshot shows a dashboard with a navigation menu on the left and a main content area. The navigation menu includes sections for FILES (Unread Files Received: 2, All Files), APPROVALS (Awaiting Approval: 1), INVOICES (Unpaid: 0), and E-CHECKLIST (e-Checklists: 0). The main content area features a search bar and a table of files. The table has columns for Client Name, File Name / Folder, Uploaded Date, Approval Type, Status, Size, and Owner. A yellow box highlights the 'Status' column for the second row, which reads 'Approved (16/02/21)'. At the bottom right, there is a pagination control showing 'Displaying items 1 - 5 of 5' and buttons for 25, 50, and 100 items per page.

Client Name	File Name / Folder	Uploaded Date	Approval Type	Status	Size	Owner
NC311D (Amy Ruth Br...)	Document to be e-signed.pdf Files From Honey Barrett Limited	11/02/2021 17:42	e-Signature	Sign	89 KB	Amy Brown
NC311D (Amy Ruth Br...)	Document to be e-approved.pdf Files From Honey Barrett Limited	11/02/2021 17:26	e-Approval	Approved (16/02/21)	92 KB	Amy Brown
NC311D (Amy Ruth Br...)	Amy B courier slip.pdf Files From Honey Barrett Limited	11/02/2021 13:00			101 KB	Amy Brown
(Amy Brown Test)	Driving Licence - Amy Brown.pdf Top Level	01/02/2021 10:18			25 KB	Amy Brown Test
(Amy Brown Test)	Amy Brown Help to Buy ISA Full statement - Nation... Files From Honey Barrett Limited	14/09/2020 16:04			61 KB	Amy Brown

## How do I e-sign documents?

1. Within the dashboard tab, click on 'awaiting approval' and this will bring up the screen below.

The screenshot shows the Honey Barrett Limited Portal dashboard. The top navigation bar includes 'Home', the Honey Barrett logo, 'Welcome to your Honey Barrett Limited Portal', and the user account 'amy.brown\_94@yahoo.co.uk'. Below this is a secondary navigation bar with 'Dashboard', 'Your Files', and 'Upload File'. The main content area is divided into a left sidebar and a main table.

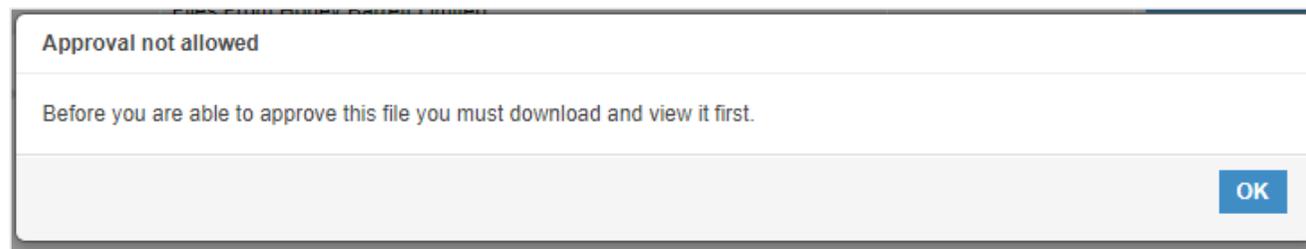
The sidebar contains a 'DASHBOARD' section with a 'Refresh' button, and a 'FILES' section with 'Unread Files Received' (3) and 'All Files'. Below this is an 'APPROVALS' section with a button for 'Awaiting Approval' (2).

The main table displays a list of documents:

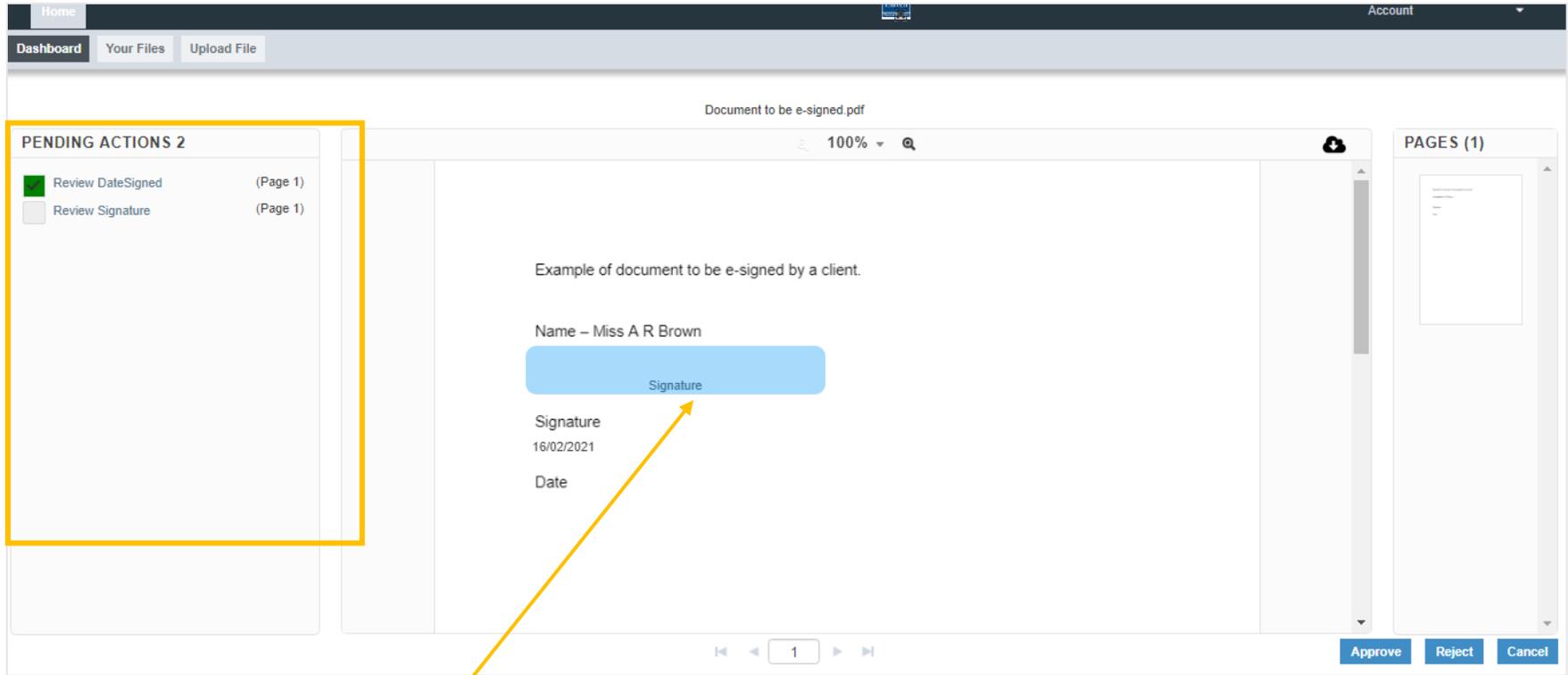
Client Name	Filename / Folder	Approval Type	Status	Last Updated ▲	Requested By
Amy Ruth Brown (NC311D)	Document to be e-approved.pdf Files From Honey Barrett Limited	e-Approval	Approve	11/02/2021	Amy Brown
Amy Ruth Brown (NC311D)	Document to be e-signed.pdf Files From Honey Barrett Limited	e-Signature	Sign	11/02/2021	Amy Brown

At the bottom of the table, there is a pagination control showing '1' and 'Displaying items 1 - 2 of 2'.

2. Click on the document to be approved to download it. *You will need to open the document before the system will allow you to e-approve / e-sign.*
3. Go across to the status column and click on 'sign' which is in a blue box.
4. If you haven't already viewed the document, a message box will pop up prompting you to view it first. Click ok and download the document.

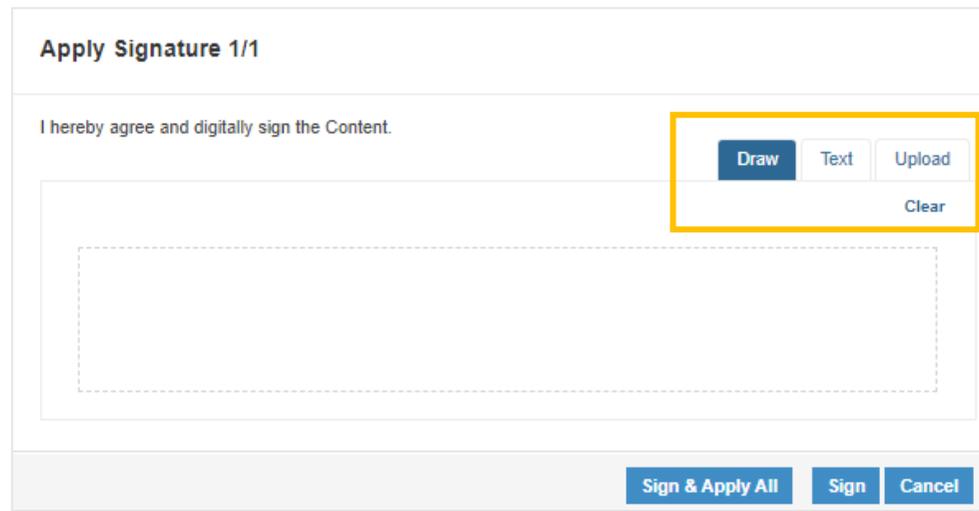


5. This screen will then appear showing the signing areas and also a pending actions box to the left.



6. Click on the blue signature box.

7. You will have three options for e-signing: draw your signature, type your name in, or upload an image of your signature.



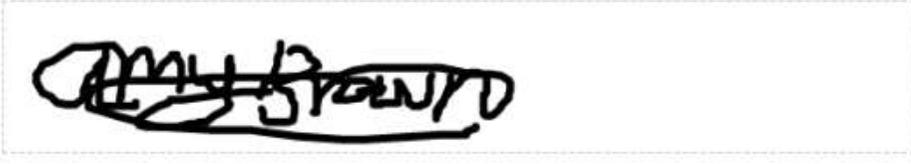
8. If you choose to draw your signature in, don't worry if it looks a bit wobbly. The text is easier but we find the majority of clients prefer to draw their signatures in. If you have an electronic version of your signature already then you can use the upload option to add that in.

**Apply Signature 1/1**

I hereby agree and digitally sign the Content.

Draw Text Upload

Clear



Sign & Apply All Sign Cancel

**Apply Signature 1/1**

I hereby agree and digitally sign the Content.

Draw Text Upload

Amy



Sign & Apply All Sign Cancel

**Apply Signature 1/1**

I hereby agree and digitally sign the Content.

Draw Text Upload

Upload Signature



Sign & Apply All Sign Cancel

9. When you have added your signature, we suggest you click 'sign & apply all' – this will apply your signature to each signing page as required within the document so you do not need to approve each signing page manually.

10. Once you have approved the document you will then be taken back to the document and will be shown a preview of the signed page(s).

11. Click 'approve' in the blue box in the bottom right corner – you may need to scroll down to the bottom of the page in order to see the final approval box.

12. If you find any errors in the document you can choose to reject the document.

The screenshot displays the Honey Barrett Limited Portal interface. At the top, there is a navigation bar with 'Home', 'Dashboard', 'Your Files', and 'Upload File' tabs. The user is logged in as 'amy.brown\_94@yahoo.co.uk' with an 'Account' dropdown. The main content area shows a document titled 'Document to be e-signed.pdf' at 100% zoom. The document text includes: 'Example of document to be e-signed by a client.', 'Name – Miss A R Brown', a handwritten signature, 'Signature', '16/02/2021', and 'Date'. On the left, a 'PENDING ACTIONS 2' panel lists 'Review DateSigned (Page 1)' and 'Review Signature (Page 1)'. On the right, a 'PAGES (1)' panel shows a thumbnail of the document. At the bottom right, a yellow box highlights three buttons: 'Approve', 'Reject', and 'Cancel'. A page navigation bar at the bottom center shows '1' between left and right arrows.

13. The document will then disappear from the awaiting approval page.

14. Under the 'all files' page, it will then show as signed with the date.

DASHBOARD		Enter Client Name or ID or File Name or Owner			Download	Notify	Delete
FILES	Client Name	File Name / Folder	Uploaded Date	Approval Type	Status	Size	Owner
Unread Files Received <b>2</b>	<input type="checkbox"/> NC311D (Amy Ruth Brown)	Document to be e-signed.pdf Files From Honey Barrett Limited	11/02/2021 17:42	e-Signature	Signed (16/02/21)	81 KB	Amy Brown
<b>All Files</b>	<input type="checkbox"/> NC311D (Amy Ruth Brown)	Document to be e-approved.pdf Files From Honey Barrett Limited	11/02/2021 17:26	e-Approval	Approved (16/02/21)	92 KB	Amy Brown

## COMMON ISSUES AND QUICK FIXES

Whilst OpenSpace is a quick and easy way of exchanging documents, there are a few common issues which you may experience:

1. **Trouble logging in** – if the system flags that your login details are incorrect then you likely need to reset your password. You can do this by click on ‘forgot your password?’ and you’ll receive an email notification which will allow you to reset your password. Alternatively, check you’re using the correct email address as your username.
2. **‘Access denied’ message** – This occurs more frequently if you log into OpenSpace by clicking on the link in the email notification, and if you have multiple accounts. Generally, this message means that you’re trying to log in with the wrong email address. Some clients may have more than one account and may use different email addresses for each account.
3. **‘Locked for editing’ message** – Sometimes when reviewing or approving a document you may receive this message, which essentially means that the system has got a bit stuck. If you log out and then log back in again this should remove this message and allow you to continue. This message does not mean that Honey Barrett are editing the document.
4. **‘Pending approval’ message** – This message will appear in the approval status box in the document list if a document needs approval by more than one person. When everyone required to has electronically approved or signed a document, then the status will automatically update to ‘signed’.

If you are unsure of an error message or if you are having trouble with OpenSpace, please do let your usual Honey Barrett contact know. We cannot see OpenSpace from your end so a screenshot of the issue / message is always very helpful and allows us to troubleshoot more easily.

## THINGS THAT HONEY BARRETT CANNOT DO ON BEHALF OF CLIENTS

We are happy to help if you need any assistance at all with OpenSpace, however there are a few things that we cannot do on your behalf as these functionalities are accessible at the client end only.

We cannot:

1. Activate your account.
2. Change your password.
3. Upload your information to send to us.
4. Approve documents on your behalf.

If you are stuck on any of these actions, please do contact us and we can talk you through how the system works. There are also instructions within this guide.