# IRIS OPENSPACE

Honey Barrett's Secure Online Portal

Client User Guide

# Contents

# WHAT IS IRIS OPENSPACE?

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.
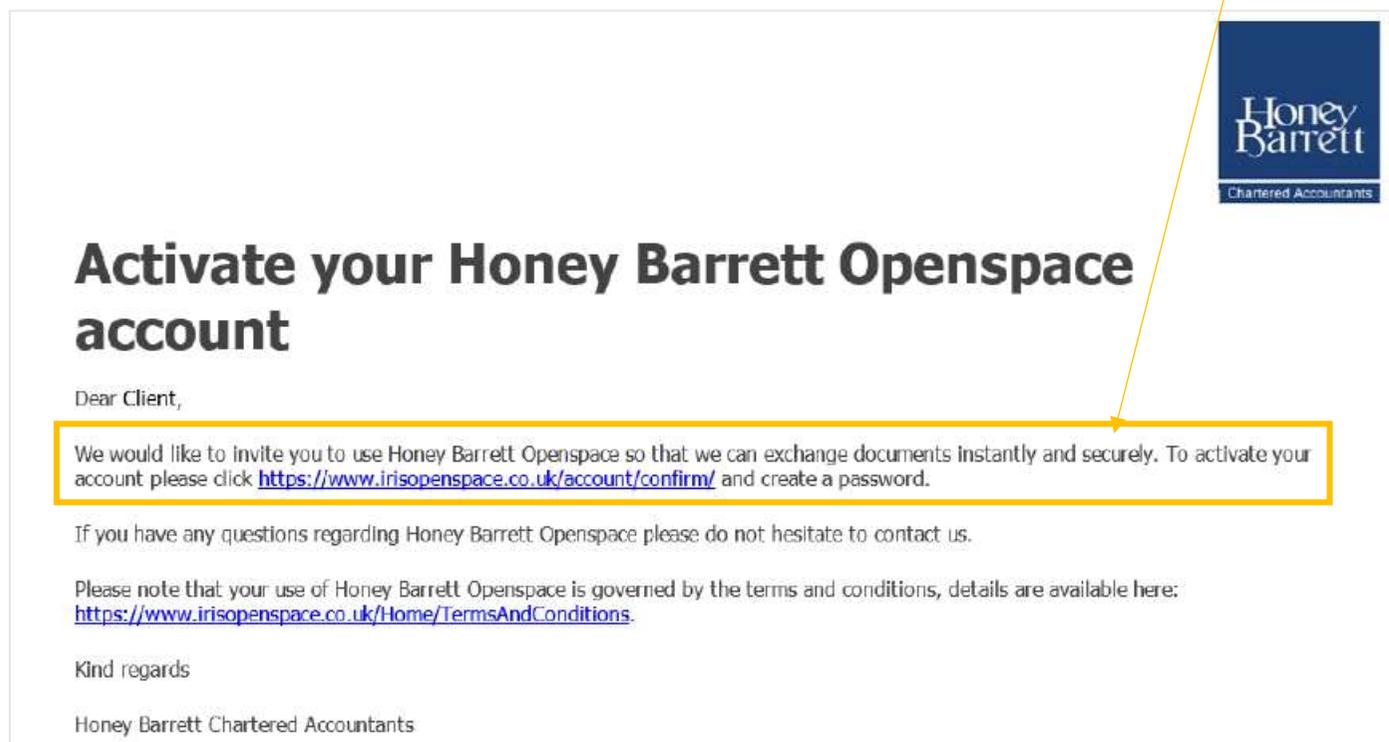


To activate your account, simply click on the link in the email, check the details are correct and create a password. Your password is encrypted and securely stored on the Honey Barrett OpenSpace website. Only you will have access to your password. You can change your password at any time.

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 –



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.
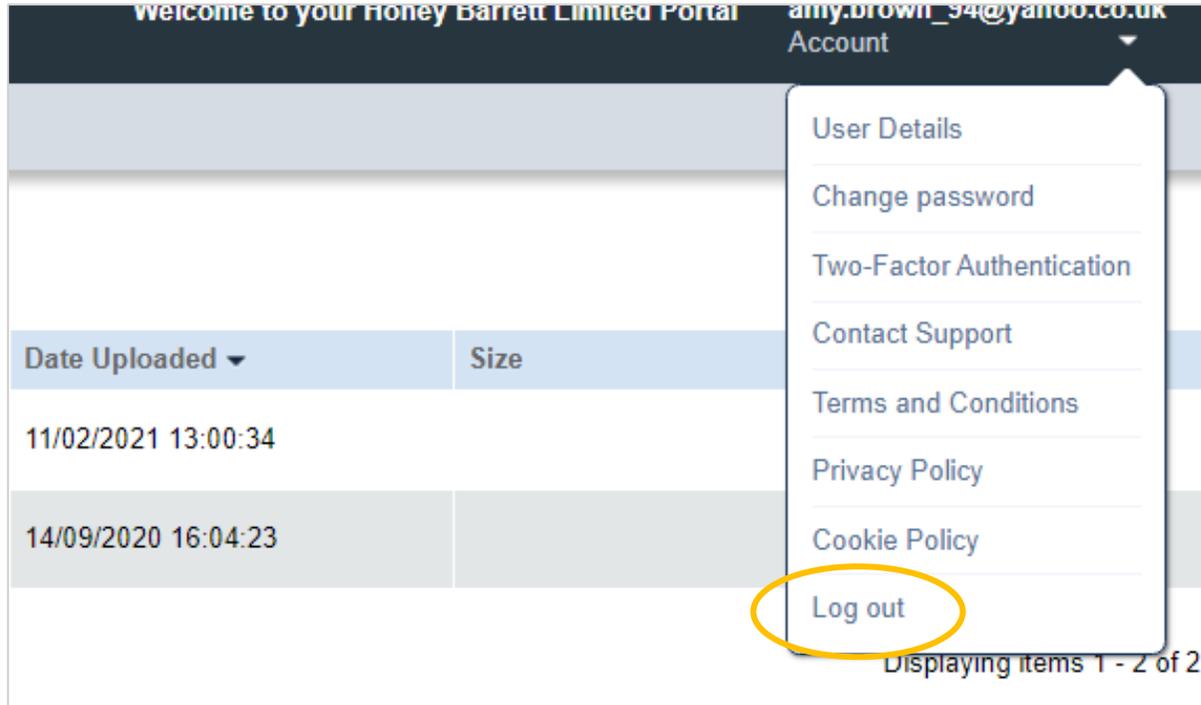
# NAVIGATING OPENSPACE

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.



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).

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.



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.

# 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.
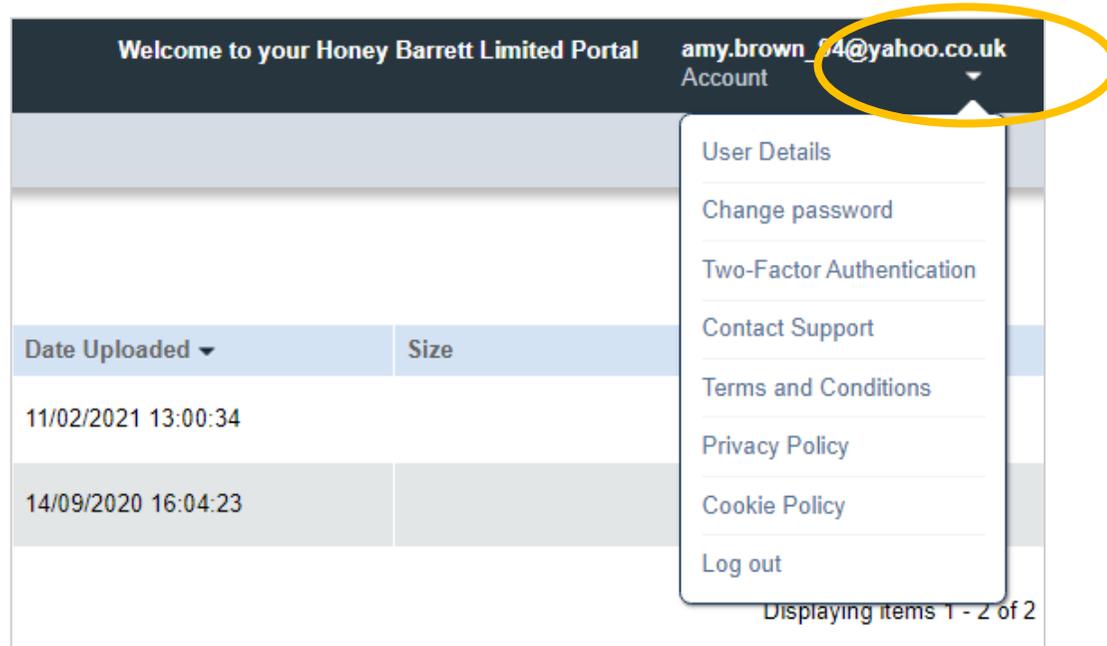


If you need to update your name or email address, click on 'user details'. You'll be taken to the screen below where you can edit your name and email address. Click on 'update' when done.

## 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.
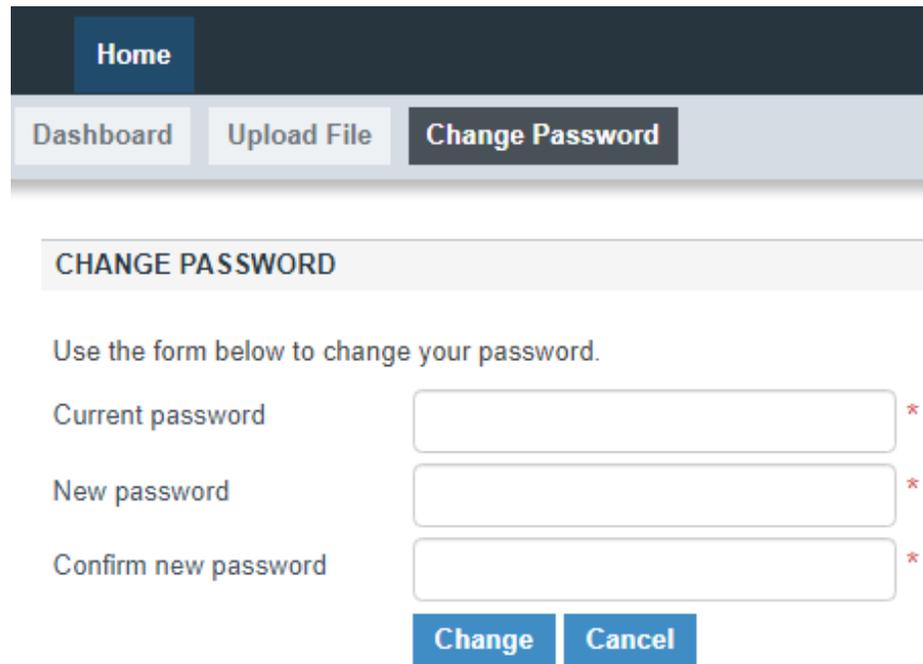
| Home |
| --- |

| Dashboard | Upload File | **Change Password** |

**CHANGE PASSWORD**

Use the form below to change your password.

Current password     [_____] *

New password     [_____] *

Confirm new password     [_____] *

**Change**   **Cancel**

Too Short

[X] 8 or more characters

[X] Contains lowercase

[X] Contains uppercase

[X] Contains special characters

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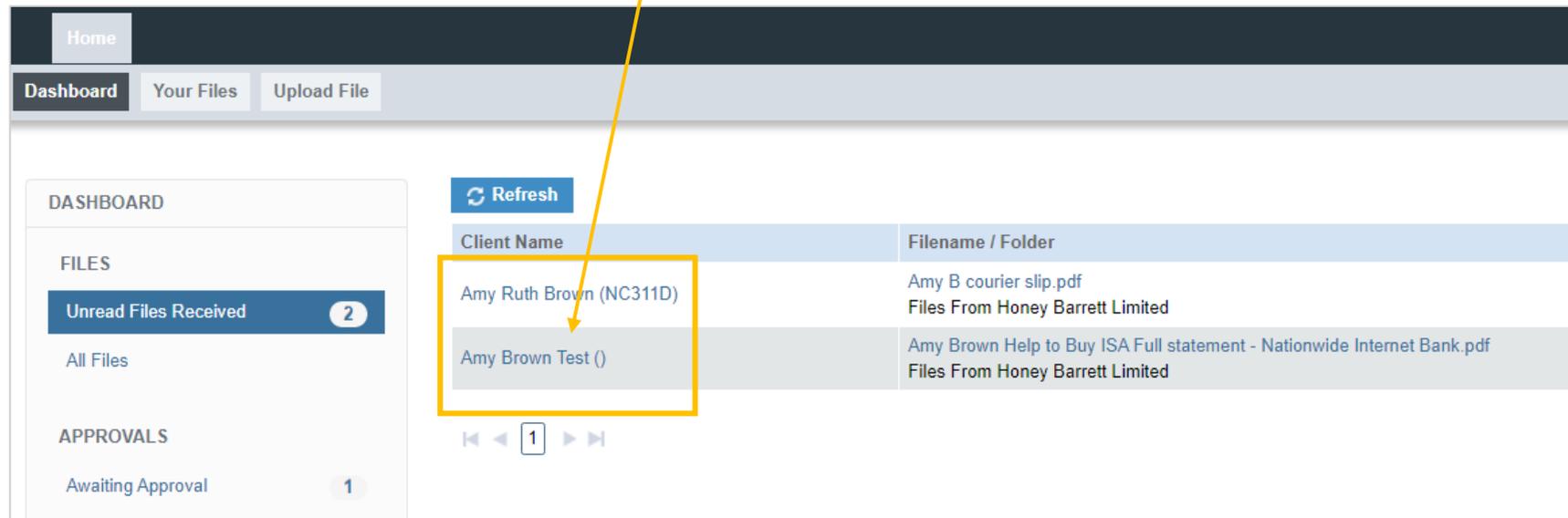
2. Click on the blue 'upload file' box found on the left side of the screen.
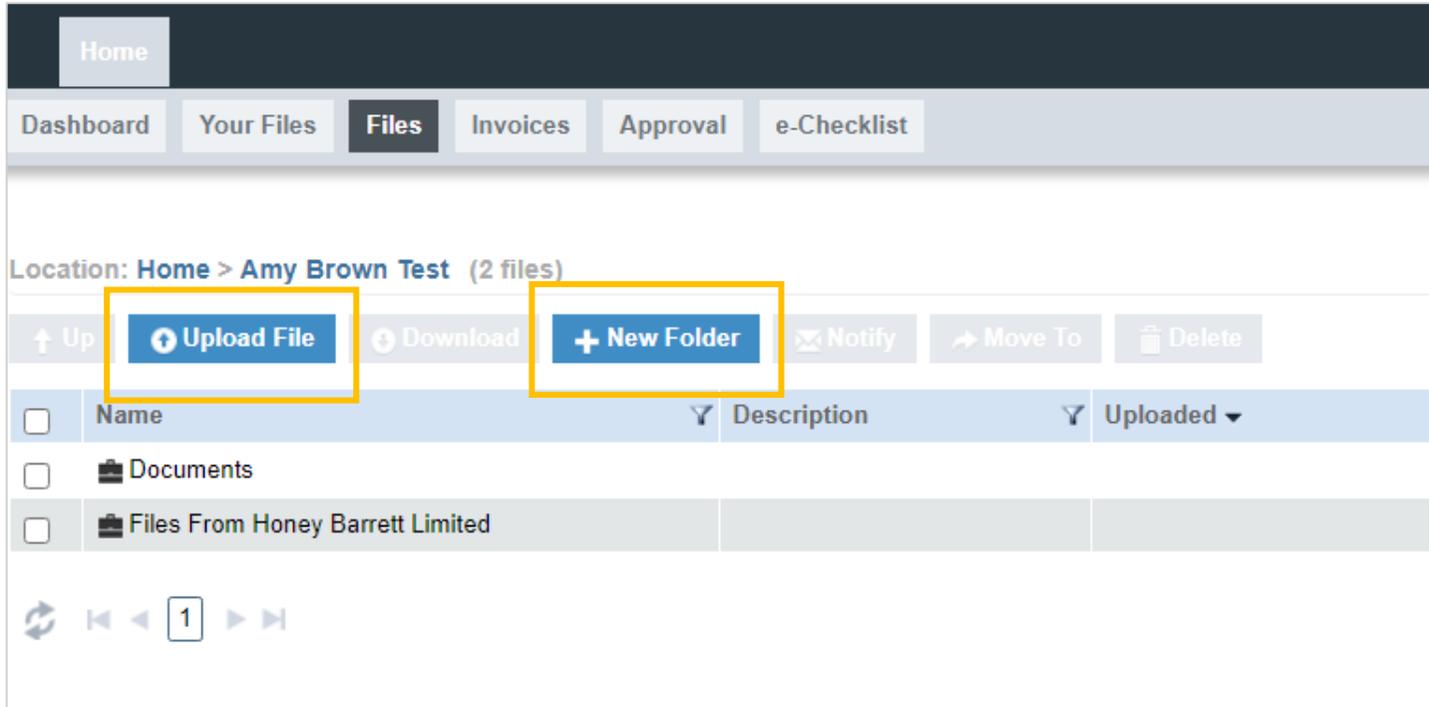


3. A box will then appear which will allow you to upload your documents. There are two ways in which to do this:
   a. Dragging and dropping your files from your computer and into the box.
   b. Clicking on 'add files' in the bottom left corner of the box (recommended).

*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 |

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.*

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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.*

**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.

| File Name | |
|---|---|
| YourBTbill_09052020.pdf | 🗑 |
| Book1.xlsx | 🗑 |

Add Files                                                                 Upload   Cancel
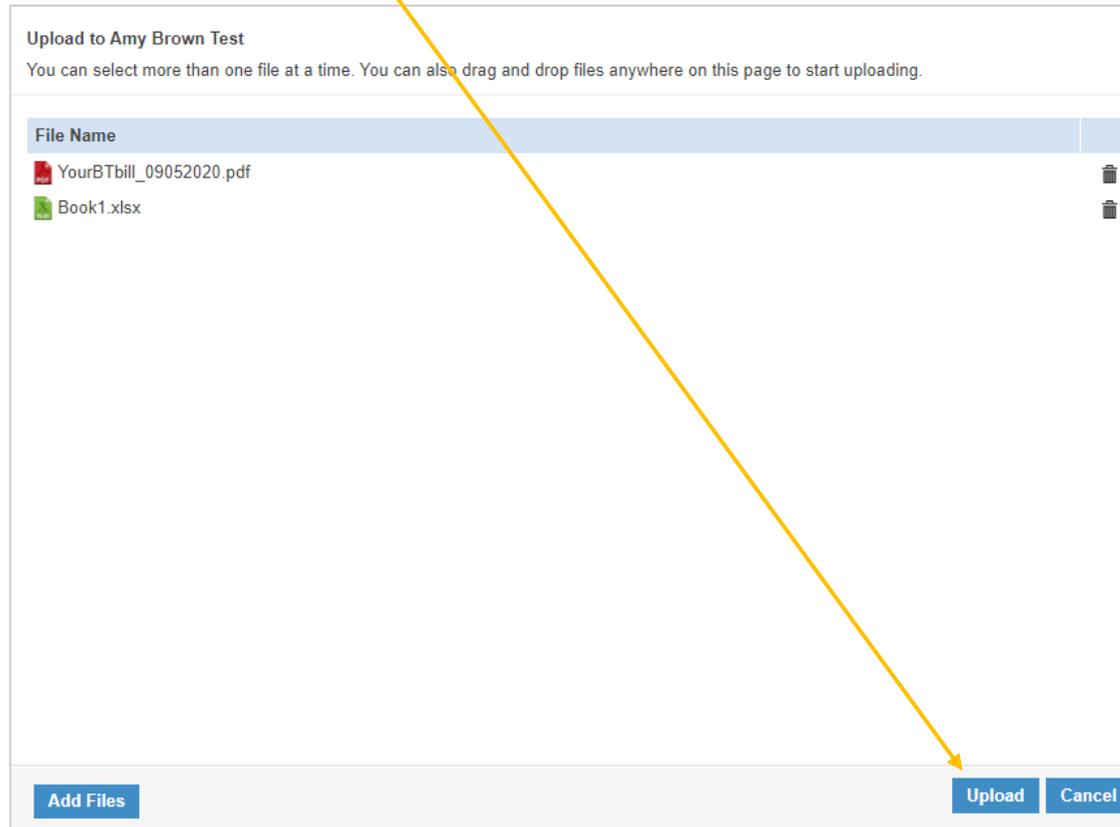
8. It may take a few seconds for the documents to upload and if you are uploading a lot of documents, you may notice a circle swirling round – this is just the system processing so just give it a minute and it will upload them all.
9. Once the documents have uploaded you'll be taken back to the 'files' 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.

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.
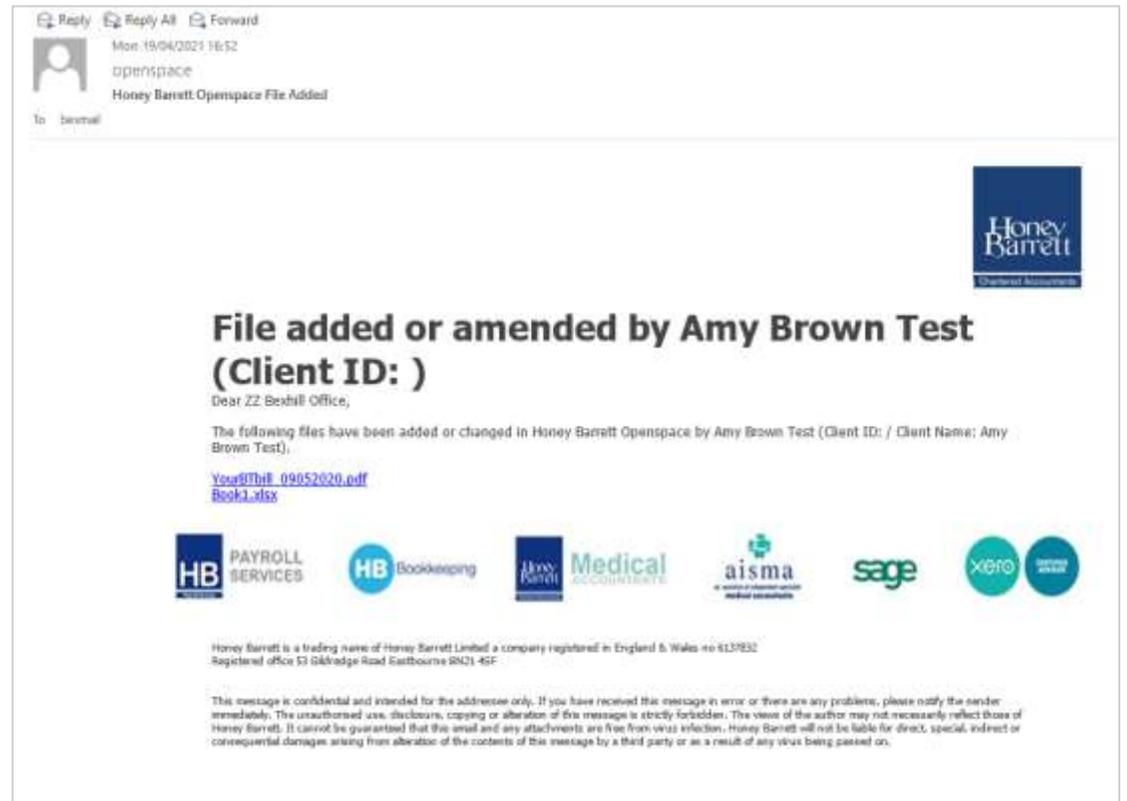
# HOW TO VIEW DOCUMENTS FROM HONEY BARRETT

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.

**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.
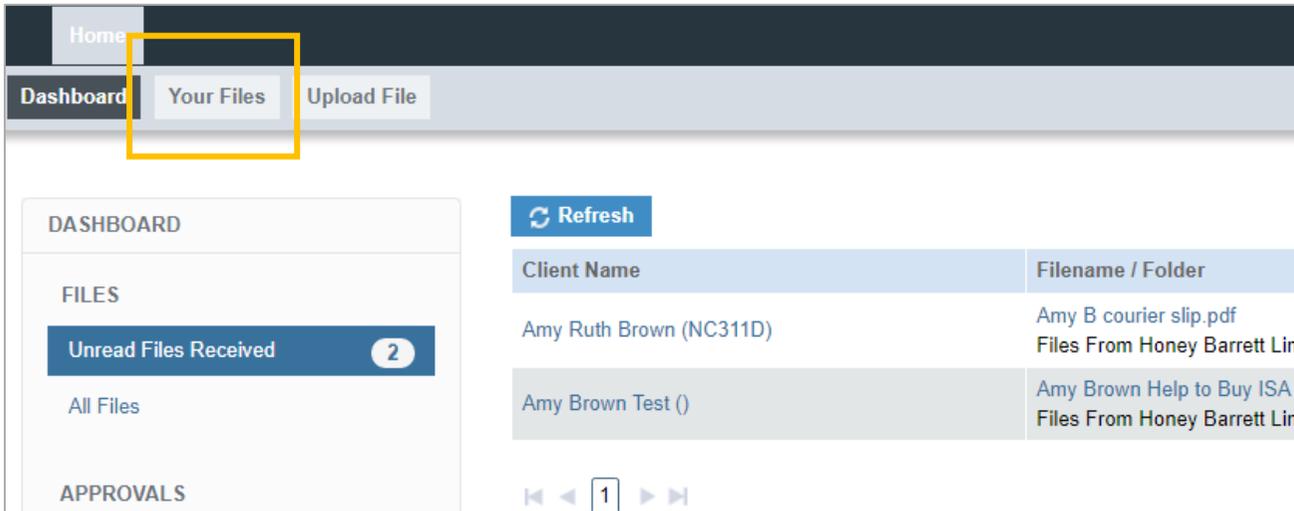


- You can see below that the two documents are sitting in the 'top level' folder.
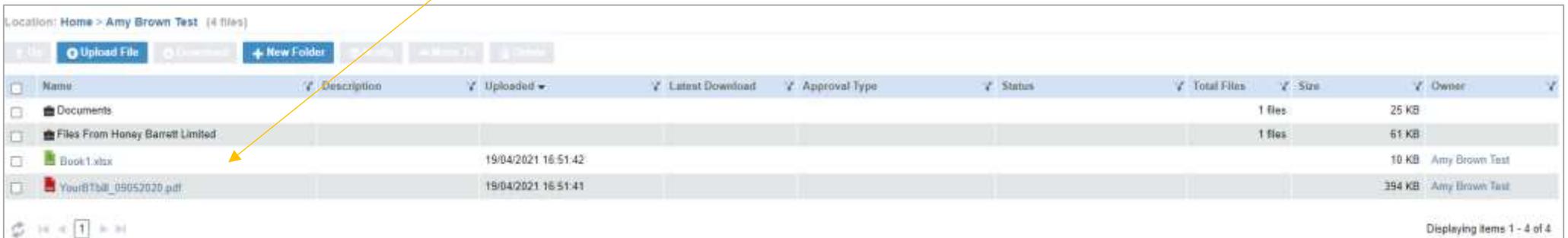


- Click on the 'documents' folder to view files that you have uploaded.
- Click on 'Files from Honey Barrett Limited' to view files that we have uploaded for you to review and / or action. – see example below of what the folder contents may look like.

*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.



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.

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.
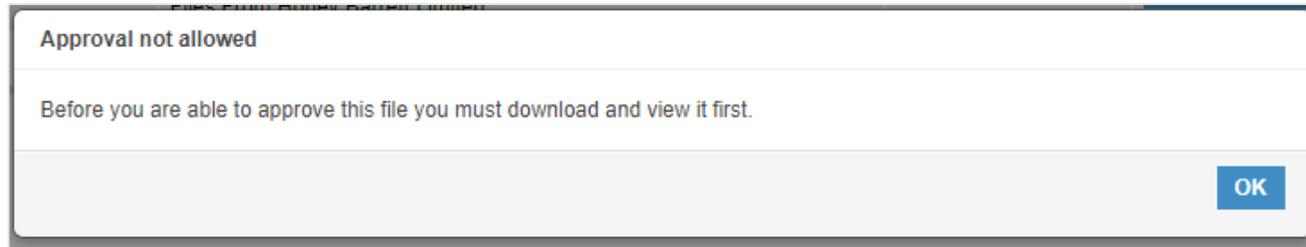


6.  Otherwise, if you have already looked through the document then after clicking approve this next box will appear, and you will then need to click on 'approve' or 'reject' as applicable.

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.

## How do I e-sign documents?

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



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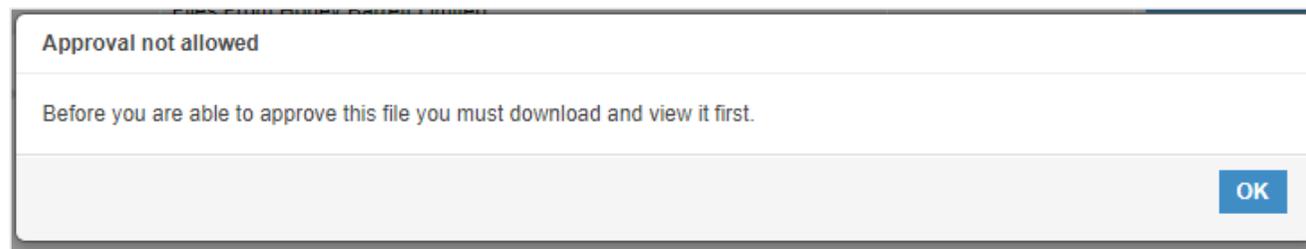
5. This screen will then appear showing the signing areas and also a pending actions box to the left.
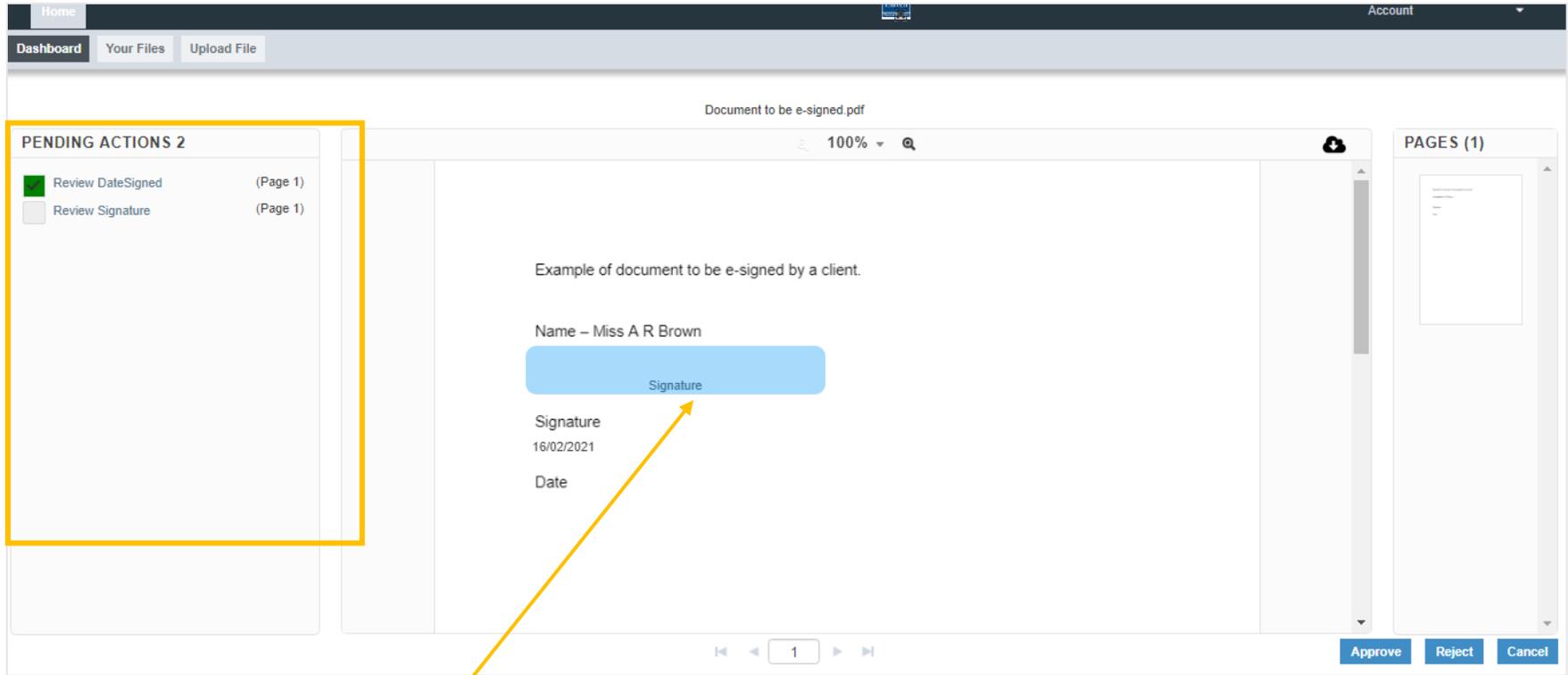


6. Click on the blue signature box.
7. You will have three options for e-signing: draw your signature, type your name in, or upload an image of your signature.
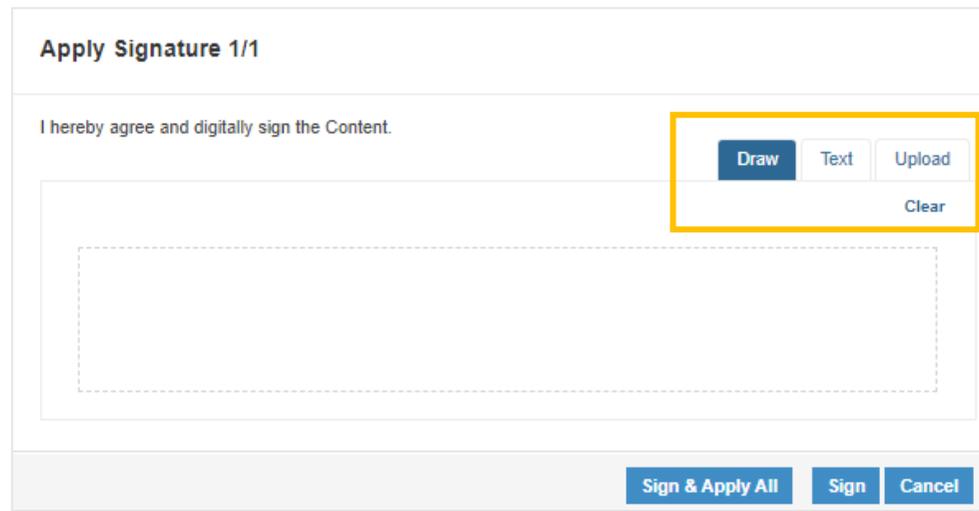
8. If you choose to draw your signature in, don't worry if it looks a bit wobbly. The text is easier but we find the majority of clients prefer to draw their signatures in. If you have an electronic version of your signature already then you can use the upload option to add that in.

**Apply Signature 1/1**

I hereby agree and digitally sign the Content.

Draw  Text  Upload

Clear
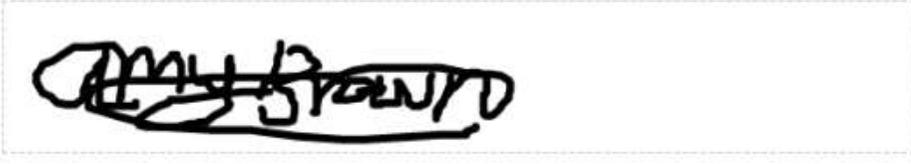
[drawn signature]

Sign & Apply All  Sign  Cancel

**Apply Signature 1/1**

I hereby agree and digitally sign the Content.

Draw  Text  Upload

Amy

*Amy*

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.

**Apply Signature 1/1**

I hereby agree and digitally sign the Content.

Draw  Text  Upload

⊙ Upload Signature

[uploaded signature image]

Sign & Apply All  Sign  Cancel

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.



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.



| | Client Name | File Name / Folder | Uploaded Date ▼ | Approval Type | Status | Size | Owner |
|---|---|---|---|---|---|---|---|
| ☐ | NC311D (Amy Ruth Brown) | Document to be e-signed.pdf<br>Files From Honey Barrett Limited | 11/02/2021 17:42 | e-Signature | Signed (16/02/21) | 80 KB | Amy Brown |
| ☐ | NC311D (Amy Ruth Brown) | Document to be e-approved.pdf<br>Files From Honey Barrett Limited | 11/02/2021 17:26 | e-Approval | Approved (16/02/21) | 92 KB | Amy Brown |

DASHBOARD

FILES

Unread Files Received 2

All Files

# 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.