


The IRIS OpenSpace Document Approval Guide

- 1) You will receive an email similar to the email below



New File(s) Added by 360, Chartered Accountants

Dear Forename Surname,


The following files have been added or changed in IRIS OpenSpace by 360, Chartered Accountants. Click on the link below to log on to IRIS OpenSpace to view the file.

[Document A.pdf](#)
[Document B.pdf](#)

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

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- 2) You will then receive another email, please click on the link to the document that requires your approval and an internet window will open.



File sent for review and approval by 360, Chartered Accountants

Dear Forename Surname,

[Document A.pdf](#) is ready for you to review and approve.

Sent on behalf of 360, Chartered Accountants.

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- 3) You will then be taken to the IRIS OpenSpace login page, enter your email address and password and click "Login"

IRIS | OpenSpace

Email address

Password

Remember me?

[Forgot your password?](#)

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- 4) Once logged in, the page should look similar to the page shown below. To view the document, click on the document name

Home Users Welcome to your 360, Chartered Accountants Portal emma@360accountants.co.uk Account

Dashboard Clients Files e-Approval

Location: Home > TEST A (files)

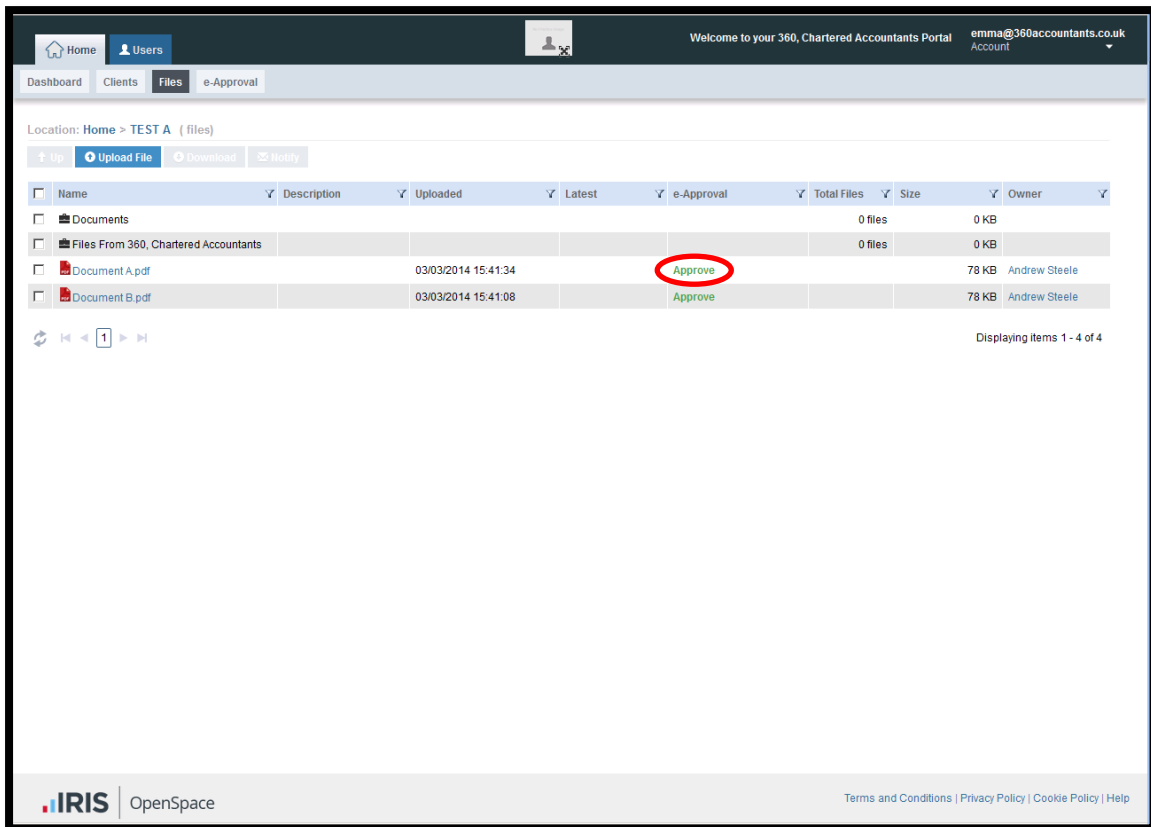
Up Upload File Download Notify

Name	Description	Uploaded	Latest	e-Approval	Total Files	Size	Owner
Documents					0 files	0 KB	
Files From 360, Chartered Accountants					0 files	0 KB	
Document A.pdf		03/03/2014 15:41:34		Approve		78 KB	Andrew Steele
Document B.pdf		03/03/2014 15:41:08		Approve		78 KB	Andrew Steele

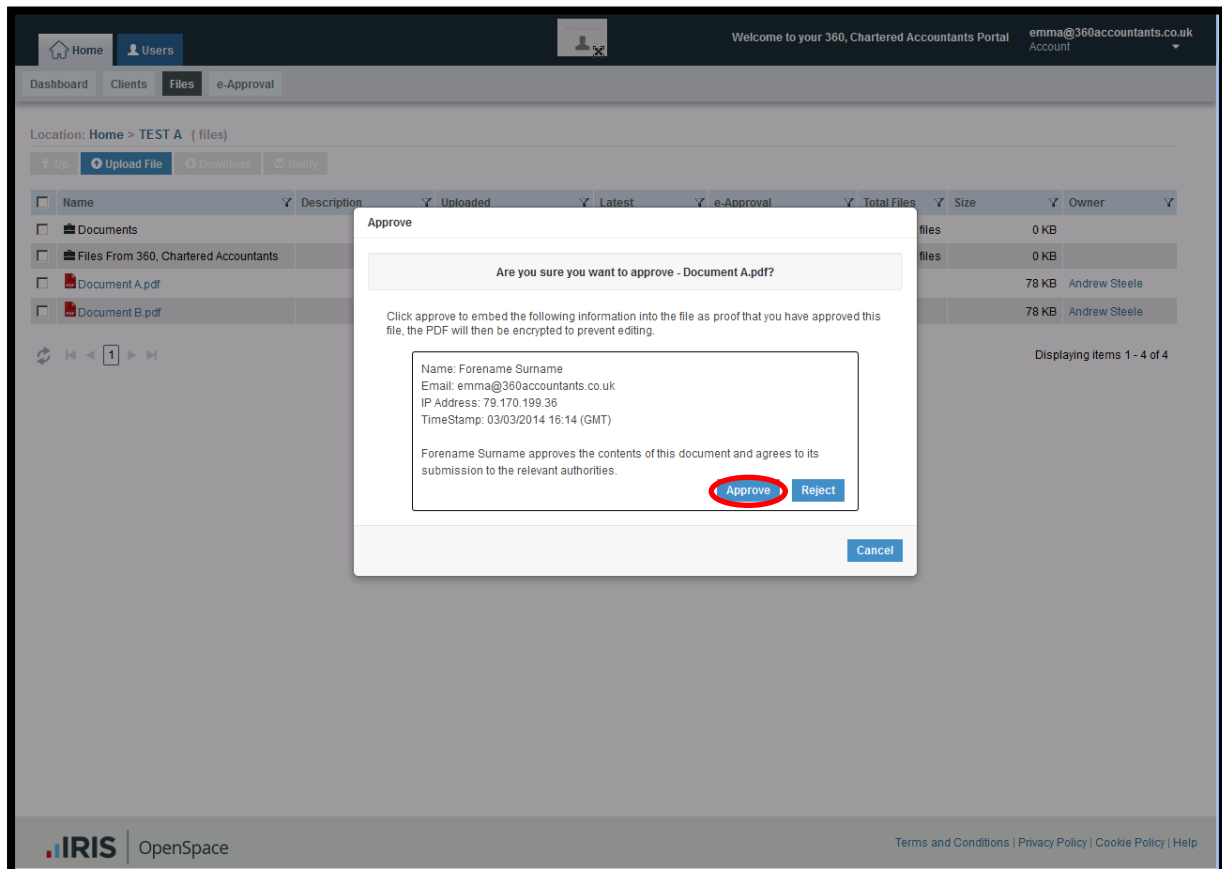
Displaying items 1 - 4 of 4

IRIS | OpenSpace Terms and Conditions | Privacy Policy | Cookie Policy | Help

- 5) Once you are happy with the contents of the document and are ready to approve it, click the approve button as shown below



- 6) A window will then open as shown below, please click the approve button



- 7) The document is now approved, if you have more than one document to approve then return to step 4 and repeat as necessary

The screenshot shows the IRIS OpenSpace client portal interface. At the top, there is a navigation bar with 'Home', 'Users', and a user profile icon. The main header includes 'Welcome to your 360, Chartered Accountants Portal' and the user's email 'emma@360accountants.co.uk'. Below this is a secondary navigation bar with 'Dashboard', 'Clients', 'Files', and 'e-Approval' tabs. The current location is 'Home > TEST A (files)'. There are buttons for 'Upload File', 'Download', and 'Notify'. A table lists files with columns for Name, Description, Uploaded, Latest, e-Approval, Total Files, Size, and Owner. Two files are listed: 'Document A.pdf' and 'Document B.pdf'. The 'e-Approval' status for 'Document A.pdf' is 'Approved (03/03/2014)', which is circled in red. The status for 'Document B.pdf' is 'Approve'. At the bottom, there is a footer with the IRIS OpenSpace logo and links for 'Terms and Conditions', 'Privacy Policy', 'Cookie Policy', and 'Help'.

Name	Description	Uploaded	Latest	e-Approval	Total Files	Size	Owner
Documents					0 files	0 KB	
Files From 360, Chartered Accountants					0 files	0 KB	
Document A.pdf		03/03/2014 15:41:34	03/03/2014 16:09	Approved (03/03/2014)		78 KB	Andrew Steele
Document B.pdf		03/03/2014 15:41:08		Approve		78 KB	Andrew Steele