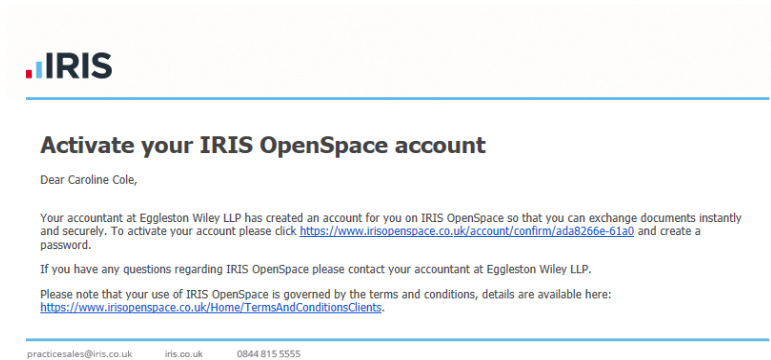


## What to expect from Open Space

### 1) Activate your account

You will get an email from Iris OpenSpace entitled "Iris OpenSpace Client Registration



Click on the first link to activate the account.

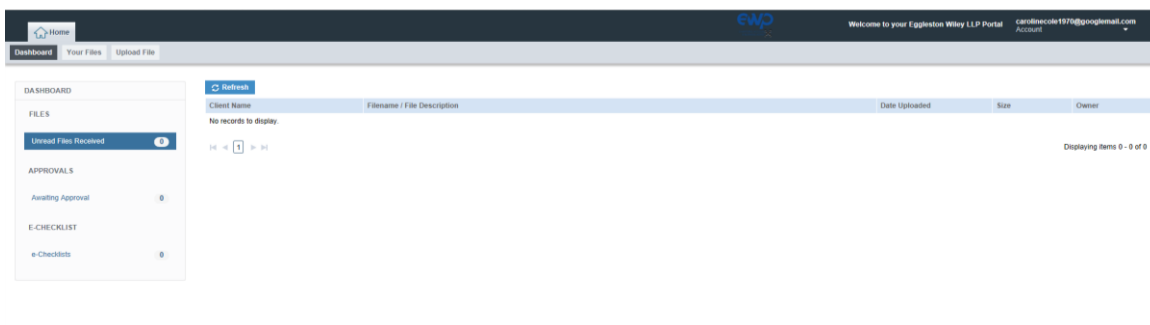
Your contact email and name will have already been entered. You need to just complete your password in the two boxes.

The password must have:

- 8 or more characters
- contain lower AND uppercase
- special characters AND
- numbers

Once set you are taken to a log in screen

When you first log in you will be asked to confirm the Terms and Conditions.



Your account is now activated and ready to use.

Iris OpenSpace will send you another email reminding you of the log in address for future reference and the email address you have set up for logging in. There is also a link in this email to reset passwords so you may want to file this somewhere safe.

## 2) Signing documents from EWP

There are three main types of document that you will see in OpenSpace

- a) A document for information
- b) A document for approval
- c) A document for signing.

Normally the title of what you need to do will be in the email sending you the relevant link. Note how ever we will normally try to send a single email to you to ask you to log in and access the various files that you are being asked to review and sign.



### New file(s) added by Eggleston Wiley LLP

Dear Caroline Cole,

The following files have been added or changed in IRIS OpenSpace by Eggleston Wiley LLP. Click on the link below to log on to IRIS OpenSpace to view the file.

[Test for OpenSpace signing.pdf](#)

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

As you log in you will be asked if you would like to download the file.

The screenshot shows the IRIS OpenSpace dashboard. The top navigation bar includes 'Home', 'Dashboard', 'Your Files', and 'Upload File'. The main content area displays a table of files with columns for Client Name, Filename / File Description, Date Uploaded, Size, and Owner. A search box is visible in the Client Name column. The table contains three rows of files, all titled 'Test for OpenSpace signing.pdf'. The left sidebar shows 'Unread Files Received' with a count of 3, 'Awaiting Approval' with a count of 2, and 'E-CHECKLIST'.

Client Name	Filename / File Description	Date Uploaded	Size	Owner
	Test for OpenSpace signing.pdf	28/06/2018 13:10:05	40 KB	Caroline Cole
	Test for OpenSpace signing.pdf	28/06/2018 13:09:33	40 KB	Caroline Cole
	Test for OpenSpace signing.pdf	28/06/2018 13:08:47	40 KB	Caroline Cole

The opening screen displays all the files and from here you can also download/view and save your files

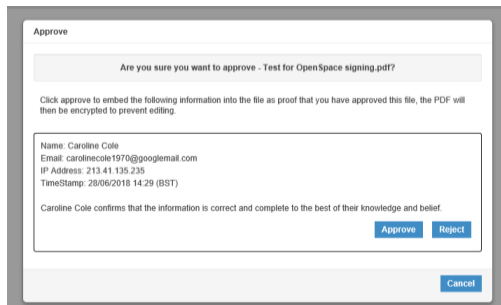
On the left hand screen there is a section for items that need to be approved.

The screenshot shows the IRIS OpenSpace dashboard with a focus on the 'Awaiting Approval' section. The table displays columns for Client Name, Filename / File Description, Approval Type, Status, Last Updated, and Requested By. Two items are listed, both titled 'Test for OpenSpace signing.pdf'. The first item has an 'e-Signature' approval type and a 'Sign' status. The second item has an 'e-Approval' approval type and an 'Approve' status. The left sidebar shows 'Unread Files Received' with a count of 0 and 'Awaiting Approval' with a count of 2.

Client Name	Filename / File Description	Approval Type	Status	Last Updated	Requested By
	Test for OpenSpace signing.pdf	e-Signature	Sign	28/06/2018	Caroline Cole
	Test for OpenSpace signing.pdf	e-Approval	Approve	28/06/2018	Caroline Cole

## To Approve

Click on the Blue Approve box

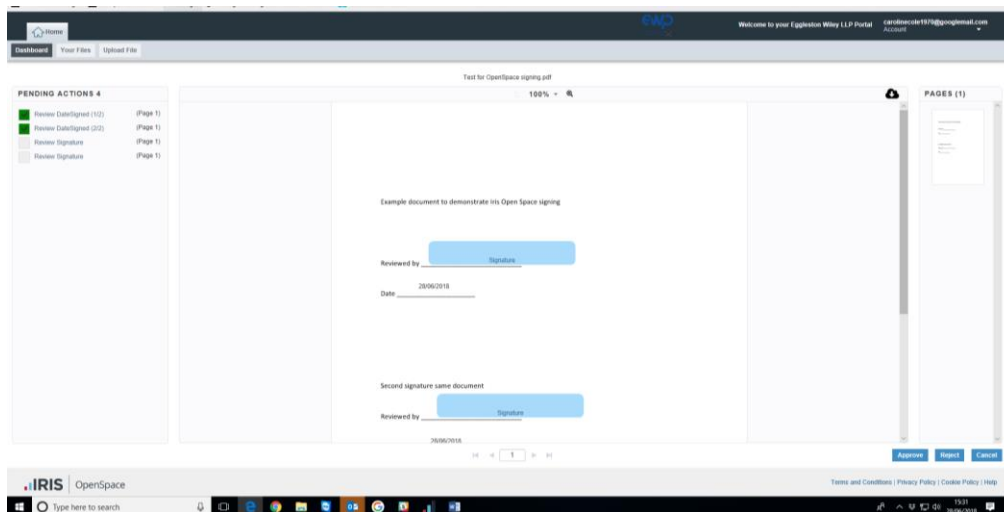


If happy with the statement select “Approve”

You will be taken back to the approval screen – refresh and the document you have just approved should no longer be shown.

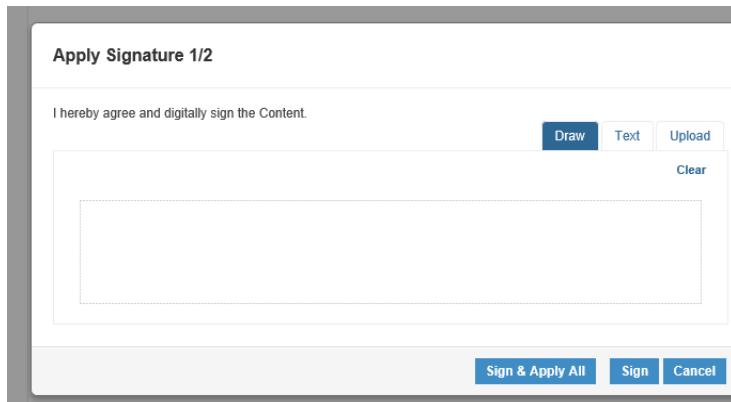
## To Sign

Click the Blue Sign box.



Today's date will be automatically completed.

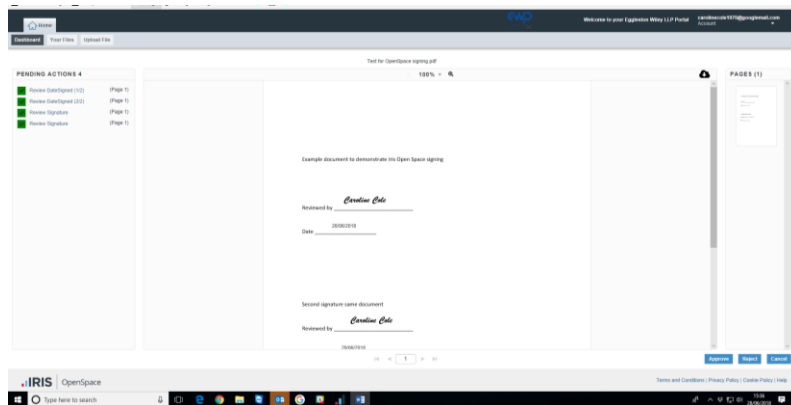
You will then need to click on the blue signature box where you will be asked to either Draw in your signature, use text to have a typed version or if you have a signature saved in your systems already you can upload this.



Once you have entered your preferred signature, select Sign. This will sign a single box so you will have to repeat the process on subsequent signing boxes if there are any in the same document.

If you select Sign All the signature will appear in all relevant boxes.

Once happy select the Approve button in the bottom right hand corner



Refresh at this point to check that all items requiring approval have been dealt with.

If you would like to go back and look at the files you have signed, select Your Files from the top left corner, select your name, files from Eggleston Wiley and the signed versions are saved.

**If you would like an electronic copy of the documents you will need to download these for your files. To avoid the files getting congested we will be deleting them once signed. We will retain a PDF copy on our files and the signing process is recorded but the documents will not be available.**

Note that you can also upload your documents to us using OpenSpace but please remember to email your EWP contact so they know the information is ready for them.