12Pay

Guide to OpenSpace

Date: April 2021

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What is OpenSpace?

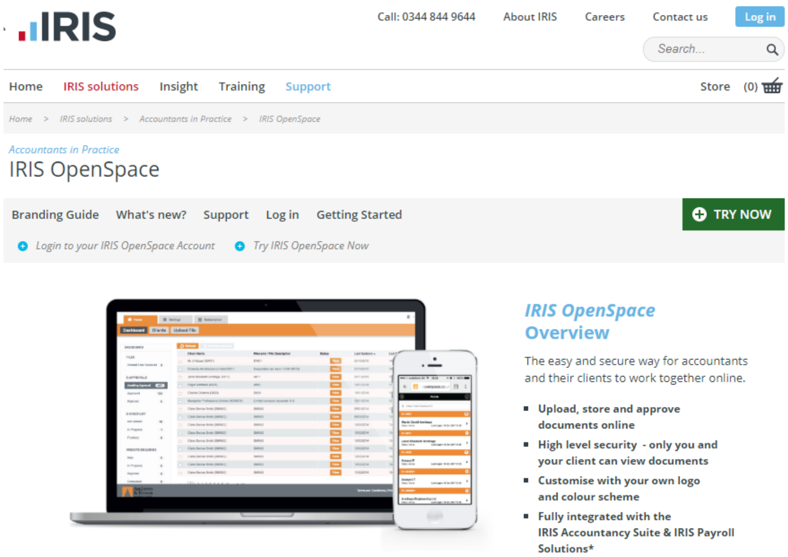
OpenSpace is a cloud solution allowing you to share documents with your clients. You are able to publish payroll reports to the OpenSpace online portal and your clients are then able to log into OpenSpace to view and/or approve the reports.

OpenSpace can incorporate your branding, colours and logos both online and in all communications; this provides a fully branded portal to your clients where they can safely and securely exchange their confidential information with you.

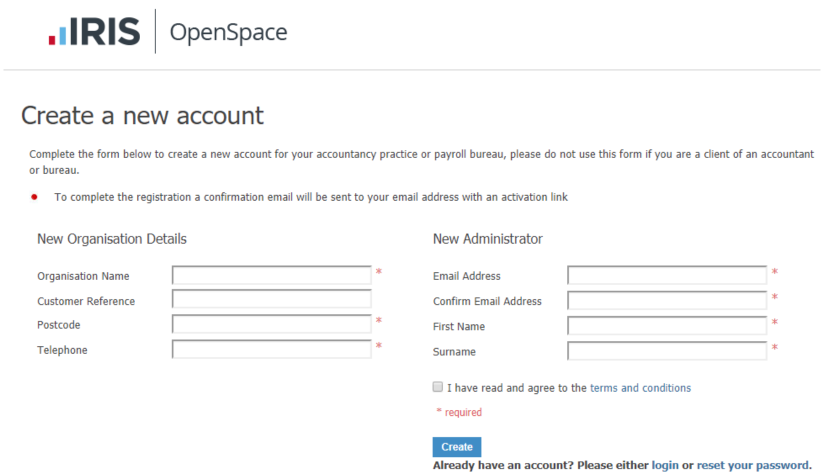
- Upload, store and approve documents online
- Reports can be accessed anywhere an internet connection is available
- Quick and easy to setup with no software to install
- Increases efficiency
- Reduces carbon footprint demonstrating an environmentally friendly solution
- Reduces distribution costs including printing, postage and processing
- Fully secure – only you and your client can view documents
- Allows clients immediate 24/7 access to report information
- Easy access to E-Approvals and E-Checklist

How to create an OpenSpace account

1. Visit the OpenSpace website **here**



2. Click **Try Now** to open the following screen:



3. Enter the required details
4. Click **Create**. An activation email will be sent to the **New Administrator - Email Address**
5. Click the link in the email to be taken back to the OpenSpace website
6. Enter a **Password** and click **Set Password**

How to update the payroll software

The **New Administrator – Email Address** needs to be added to the payroll software along with the relevant Client selected in the **Employer Details**.

1. Log into Payroll, click on the **Employer | Publish** tab
2. Enter the **Username** and **Password** registered on the OpenSpace website

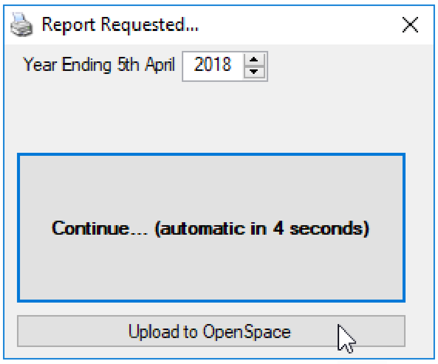
3. Click **Refresh** to populate the **Client Name** dropdown with the available clients in the OpenSpace account. The **Client Name** list is in **Client ID** order
4. Select the Client from the **Client Name** dropdown; this will automatically populate the **Client ID** with the Client ID configured in the OpenSpace Account, then click **OK**

It is important to ensure that the correct Client ID/Client Name is entered to prevent potentially publishing to the wrong client

How to publish reports to the OpenSpace portal

Reports

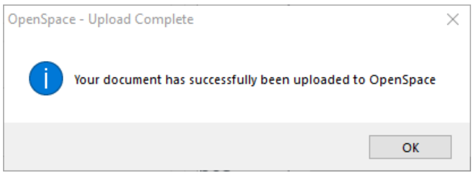
1. Print the required report in 12Pay
2. From the **Report Requested**... screen, click **Upload to OpenSpace**



   Please Note: If the report does not have the **Report Requested** screen, a message will be displayed asking **Would you like to upload this report to OpenSpace?** click **Yes**

3. From the **OpenSpace – Request e-Approval** screen, select the required settings
4. Tick **Send email notification** if you want an email notification to be sent to your client. This will be sent if they have **Receive Notifications** ticked in the client setup of OpenSpace
5. Select users to request approvals from by clicking **All Users** or **Select Users.** Click the **Select Users** button to select specific users, tick or untick as required and click **OK**
6. By default, **Generic approval** will be selected and displays the following text:

   [Client] agrees and approves the contents of this document
   If you want to customise the text, select **Custom approval** and enter the required text – a maximum of 300 characters over 3 lines
7. To request electronic approval from your client, tick **Client has given consent to electronically approve their documents**
8. If you do not require approval for the documents, click **Skip**. The document will then not include a request for approval
9. Clicking **Skip** or **Request** will upload the document to OpenSpace



How to view the published documents

To view the published documents:

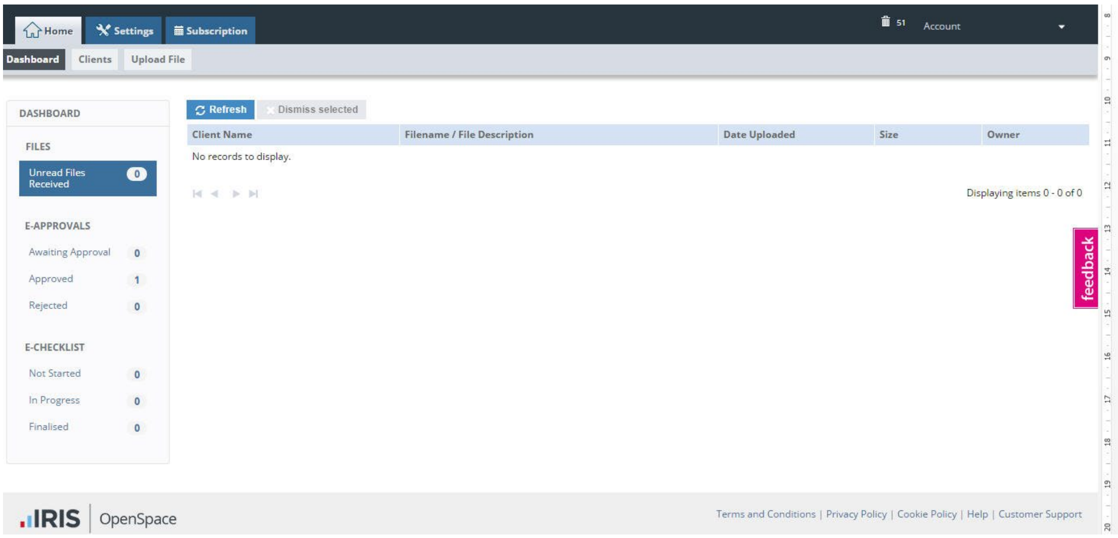
1. Go to the OpenSpace website at **https://www.irisopenspace.co.uk/Account/Logon** and log in with the registered email address and password
2. From the **Dashboard**, choose from:
   - Files – Unread Files Received
   - E-Approvals – Awaiting Approval; Approved or Rejected
   - E-Checklist – Not Started; In Progress or Finalised*

   *The E-Checklist is only used by IRIS Personal Tax software – for further details click **here**

3. Click on the relevant **Filename / File description**, this will download the document for you to view

Managing the OpenSpace Account

The main page has three tabs on the top left, **Home**, **Settings** and **Subscription**



Home

The **Home** tab has three views – **Dashboard**, **Clients** and **Upload File**

Dashboard

The **Dashboard** view displays all documentation for all clients in the payroll software that have had documentation published to OpenSpace, along with the current status. The documentation is broken down into three sections:

- Files – Unread Files Received
- E-Approvals – Awaiting Approval; Approved or Rejected
- E-Checklist – Not Started; In Progress or Finalised*

*The E-Checklist is only used by IRIS Personal Tax software – for further details click **here**

Clients

From the **Clients** tab you can:

- Click **+ New Client** to add a new Client
- Upload a file to all clients
- Search for a client by **Client Name** or **Client ID**
- Check a Client's **Status** for instance, **Not Registered** or **Active**
- Edit **Client** – allows you to add a client user, delete a client user, resend activation request, and edit client user email address

Click on the relevant **Client Name** – this will take you to the **Files** view and display current documents together with information such as the date **Uploaded**, the **e-Approval** status, file **Size** and **Owner**.

Files

1. To view a document, click on the **Name**, this will either open a folder containing documents or download the document for you to view
2. To upload a new document and send an email notification to the client, click **Upload File**, tick **Send email notification** and **Browse…** for the required report
3. For ease of administration, you can setup folders to store documentation – perhaps a folder for payslips. To add a folder, click **New Folder**. Tick the selection box next to the new folder and click **Edit**, here you can amend the folder name and add a description if required
4. To move a document to a folder, tick the selection box and then click **Move To**, select the folder you require and select **Move**. You can select multiple documents
5. To copy a document to a folder, tick the selection box and then click **Copy To**, select the folder you require and select **Copy**. You can select multiple documents

e-Approval

This view shows all the documents for the relevant Client, along with their current **Status** regarding e-Approval, for instance if approval has been requested or if the document has been approved and who it has been approved by.

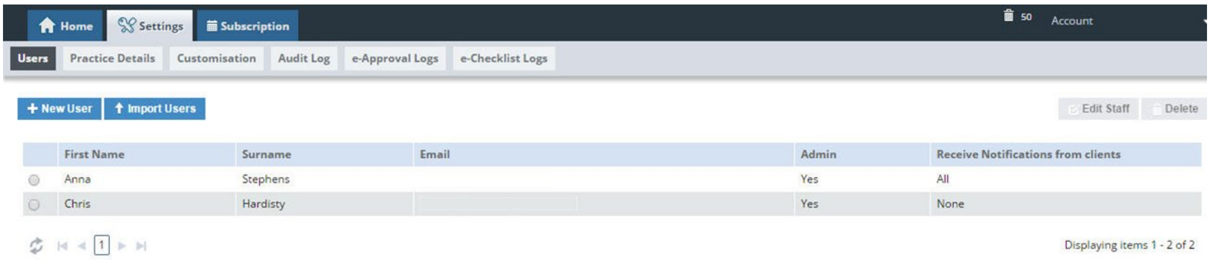
e-Checklist

e-Checklists are a great way to collate tax information electronically for your clients. They eradicate the cost of producing and posting paper checklists, whilst negating data entry overheads and errors.

This valuable integration, offered by IRIS Personal Tax – part of the IRIS Accountancy Suite and OpenSpace, means that you receive the client tax data you need, when you need it. Click **here** for further information.

Settings

The **Settings** tab has 6 tabs, **Users**, **Practice Details**, **Customisation**, **Audit Log**, **e-Approval Logs** and **e-Checklist Logs**.



When the **Settings** tab is selected, it opens by default on the **Users** view.

- **Users** shows the account administrator details. These can be updated by clicking the **Edit Staff** button

Users

From the **Users** tab you can:

- View or Edit staff
- Add new users
- Import users
- Delete users

Practice Details

From the **Practice Details** button, you can:

- Edit the Practice details
- Add/Edit or Delete your Default Folder Structure
- Apply amendments to your Default File Sort Order, choose from:
  - Uploaded time/date, most recent first
  - Latest Downloaded time/date, most recent first
  - Electronic approval status, required first
  - Alphabetically, ascending by name
  - Alphabetically, ascending by description

Customisation

Here there are various options enabling you to build your own, personalised, client portal. Click **here** for further details.

Audit Log

Here you can view and download actions carried out in OpenSpace, such as:

- User Logged In
- User Logged Out
- File Deleted
- File Downloaded by User
- File Uploaded

This screen displays the **Date**, **User**, **Action**, **Client ID** and **Data**.

e-Approval Logs

From this tab you can view documents for the relevant Client, the **Status**, for instance if approval has been requested or if the document has been approved and who it has been approved by.

e-Checklist Logs

View here the log of e-Checklists, displaying the **Client ID**, **User**, **Name**, **Description** and date **Last Updated**.

Subscription

The **Subscription** tab has two sections, **Your Subscription** and **Invoice History**.

- The **Your Subscription** section displays you **Status**, **Subscription Id**, **Subscription Cost**, **Created Date** and **IRIS Free Space**. You can update your **Subscription** here by purchasing additional storage, which you will be billed automatically for each month until you cancel it from this screen
- Click on **Invoice History** to view, print or export invoices. Links to the invoices are sent automatically after each monthly payment is taken

Useful numbers

HMRC online service helpdesk	HMRC employer helpline
Tel: 0300 200 3600 Fax: 0844 366 7828 Email: helpdesk@ir-efile.gov.uk	Tel: 0300 200 3200 Tel: 0300 200 3211 (new business)

Contact Support

Your Product	Phone	E-mail
IRIS 12Pay	N/A	support@12pay.co.uk
IRIS PAYE-Master	0344 815 5555	payroll@iris.co.uk
IRIS Payroll Business	0344 815 5555	ipsupport@iris.co.uk
IRIS Bureau Payroll	0344 815 5555	ipsupport@iris.co.uk
IRIS GP Payroll	0344 815 5555	gpsupport@iris.co.uk
IRIS GP Accounts	0344 815 5555	gpaccsupport@iris.co.uk
Earnie or Earnie IQ	0344 815 5555	earniesupport@iris.co.uk
IRIS Payroll Professional (formerly Star)	0344 815 5555	payroll-support@iris.co.uk