

# Hanley & Co

Business Advisors and Chartered Accountants

Guide To

# IRIS OpenSpace





# Business Advisors and Chartered Accountants

**Accounting should feel simple, not stressful.**

We're pleased to share this guide, tailored to support you. Everything we offer is designed to give you clarity, confidence, and ongoing support that suits the way you work.



Ground Floor 7 Neptune Court, Hallam Way, Whitehills Business Park, Blackpool, FY4 5LZ. Tel: 01253 320018 or 01772 673377.

Ashton Old Baths, Stamford Street West, Ashton under Lyne, OL6 7FW. Tel: 0161 339 7502.

Directors: Dean R Logan B'Econ (Hons) FCA, Ann Logan and Gina Epps BSc (Hons) ACA. Hanley & Co. Ltd. Registered in England No. 3043166 Registered Office: Blackpool. Our fees, complaints, and privacy policies are available on our website.

# What is IRIS OpenSpace?

IRIS OpenSpace is a secure online portal we use to:

- Share documents with you safely,
- Receive information from you securely,
- Obtain approvals on key documents

This replaces emailing over confidential information and eliminates the associated security risks with doing so.



# Getting started (registration)

After we invite you, you will receive an email titled:  
“IRIS OpenSpace Client Registration”

You will then need to:

- Open the email,
- Click the registration link,
- Create your memorable password – please ensure that this is at least 10 characters with a combination of upper case and lower case, along with special characters to strengthen this. To prevent losing your password, we would recommend you use a password manager.



## Please activate your OpenSpace portal

Dear [Name],

Dean Logan at Hanley & Co Chartered Accountants has created an account for you on their secure documents portal OpenSpace so that you can view documents they have sent you for approval.

To activate your account please click <http://hanleyandco.irisopenspace.co.uk/account/confirm/> and create your own password.

Then you will be able to view, download and click the button to 'e-approve' the documents we've uploaded.

If you have any questions regarding the set-up or use of this system please contact Gina or Debbie.

Whilst we believe using this OpenSpace portal is beneficial in that it is quicker, cheaper and more secure than posting documents to you, we do completely understand if you would prefer not to use it. In this case please forward this email back to [gina@hanleyandco.co.uk](mailto:gina@hanleyandco.co.uk) and confirm you would prefer to receive your documents through the post in future.

Should you have any queries please do not hesitate to contact us.

Kind regards,

# Logging in

You can log in via the 'login' button or via the following website: 'www.irisopenspace.co.uk' (You may be asked to accept terms when you first login)

You can Log in to IRIS OpenSpace using your email address and your chosen password.

Note that you can also use OpenSpace on your mobile phone, iPad, or desktop computer.



The screenshot shows the login interface for IRIS OpenSpace. At the top left is the IRIS logo, followed by a vertical line and the text 'OpenSpace'. Below this are two input fields: 'Email address' with the placeholder 'user@example.com' and 'Password'. Under the password field is a checkbox labeled 'Remember me?'. Below the checkbox are two links: 'Forgot your password?' and 'Need an account?'. At the bottom of the form is a blue 'Login' button and a 'Find out more' link.

# Finding your documents

When you have logged into OpenSpace, in order to view the documents we have shared with you:

- Click 'Files from Hanley & Co'
- Open a folder and click a file you wish to view.



# Documents awaiting approval

Some documents we send to you will require your approval, such as:

- Accounts
- Tax returns
- Important confirmations

You will be notified via email when approval is required from you.



# Approving documents

To approve a document you will need to:

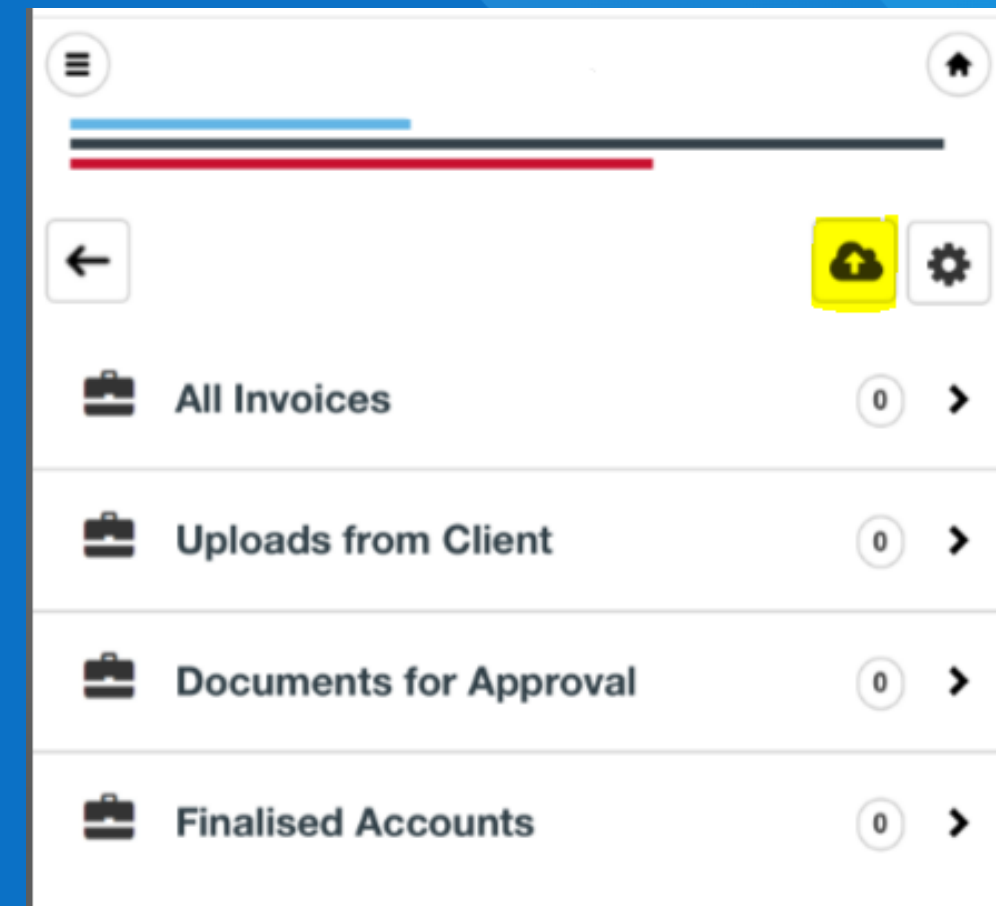
1. First open the document
2. Review the contents of the document
3. Click 'Approve' (and e-sign - if prompted)

Once you have approved the document, we are notified of this automatically.

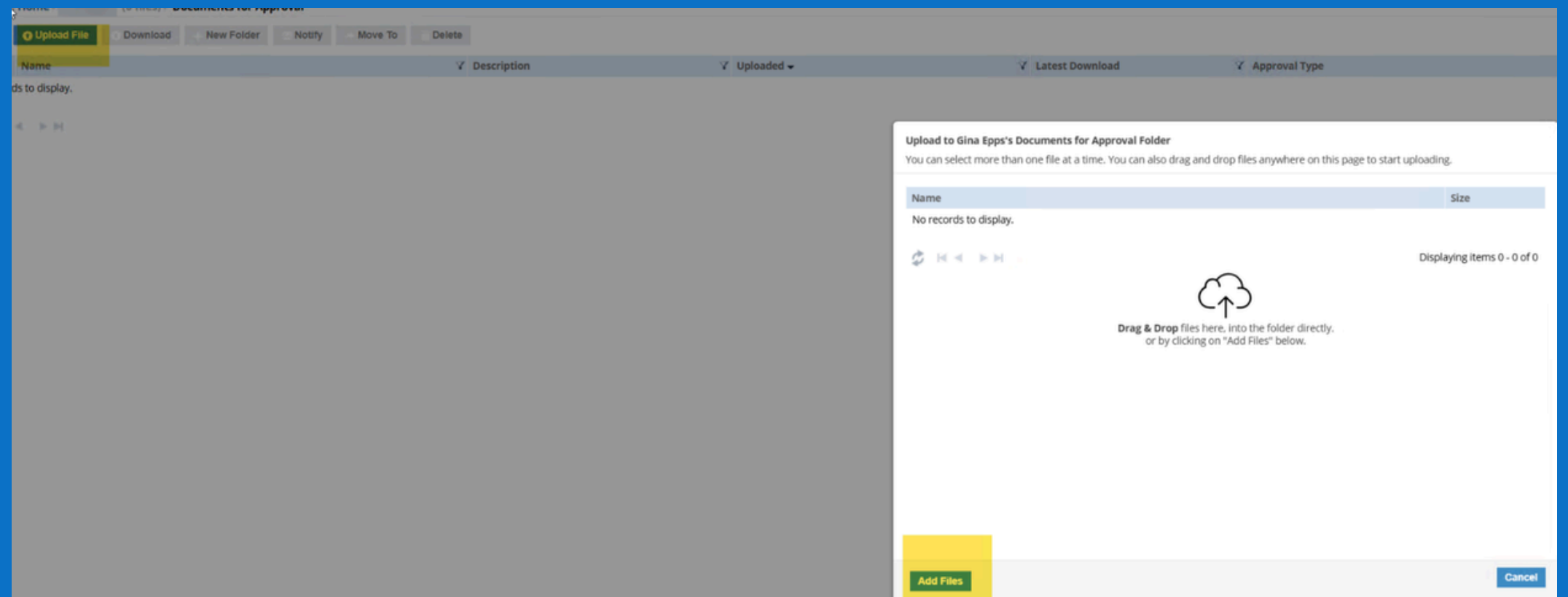


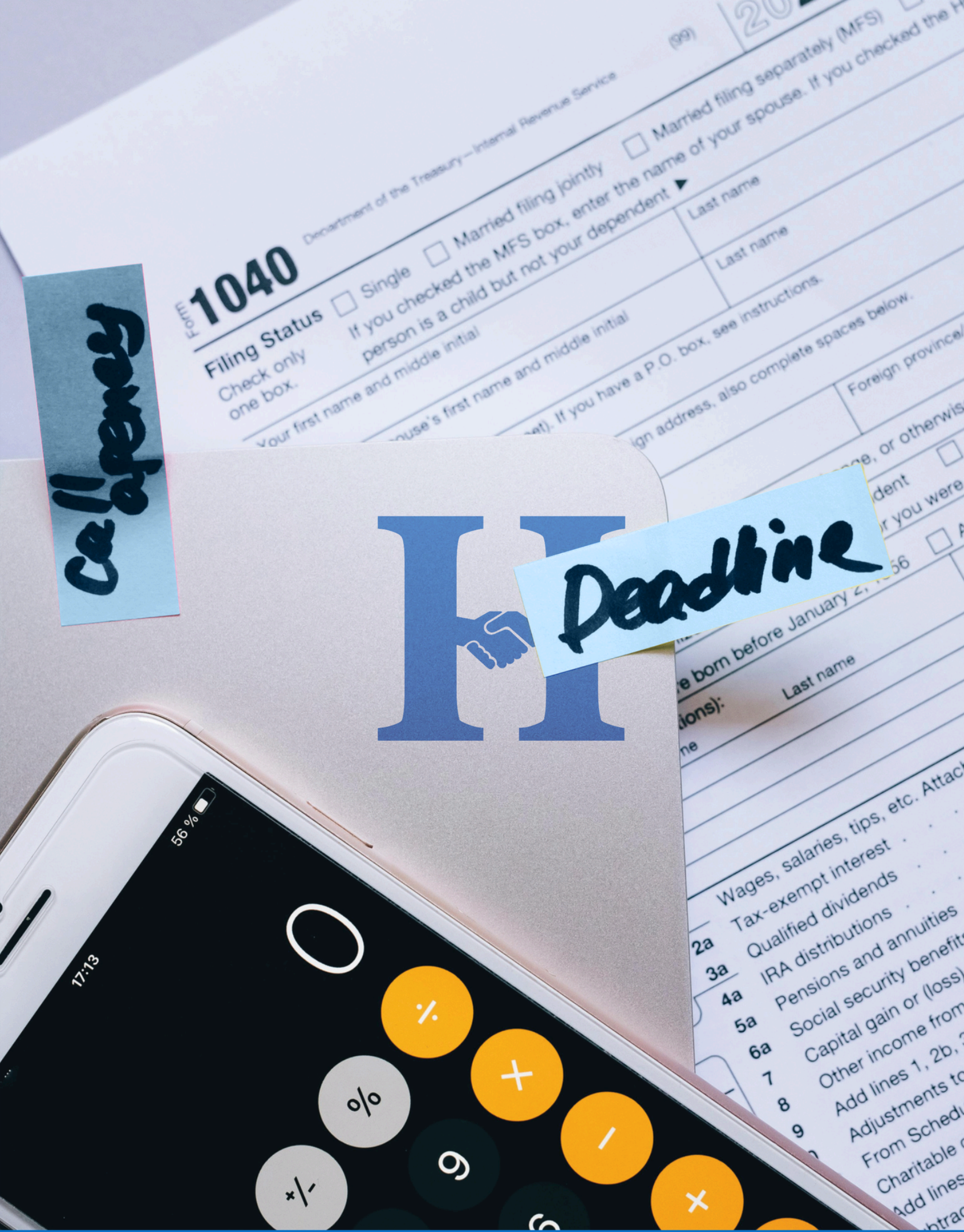
# Uploading documents to us

You can upload documents (such as bank statements, records and spreadsheets and forms and confirmation) to us securely, instead of emailing these, to do this:



1. Log in to IRIS OpenSpace
2. Click 'Home → Upload File'
3. Add files or drag and drop
4. Click upload





# We're Here to Help

If you have any questions, we're here to help – we're “Accountants You Can Talk To”.

If you require any assistance, or you are encountering issues, with any of the following:

- Logging into OpenSpace
- Uploading documents
- Approving files

Please reach out to us and we would be happy to help.

You can call us directly on 0161 339 7502 or 01253 320 018 to discuss any queries.

