

## IRIS OpenSpace – How to approve documents

1. You will receive an email similar to below. Open the email and click the link

**IRIS**

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### New file(s) added for electronic approval by Mitchells Grievson Ltd

Dear Mitchells Grievson,

The following files have been added in Mitchells Grievson Chartered Accountants by Mitchells Grievson Ltd and are ready for you to review and approve. Click on the link below to log on to Mitchells Grievson Chartered Accountants to view the file.

[MG-Personal tax computation-2019-20.pdf](#)

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2. You will then be taken to the IRIS OpenSpace login page, enter your email address and password and click “Login”



The screenshot shows the login interface for Mitchells Grievson Chartered Accountants. At the top left is the 'mg' logo and the text 'mitchells grievson Chartered Accountants'. Below this are two input fields: 'Email address' with the value 'mgchartered@gmail.com' and 'Password' with a masked password '.....'. There is a checkbox for 'Remember me?' which is currently unchecked, and a link for 'Forgot your password?'. At the bottom of the form is a blue 'Login' button.

- Once logged in, the page should look similar to the page shown below.  
Click on the folder to view the documents

The screenshot shows the IRIS OpenSpace web interface. At the top right, the user is logged in as 'mgchartered@gmail.com Account'. The navigation menu includes 'Home', 'Dashboard', 'Your Files', 'Files', 'Invoices', 'Approval', 'Upload File', and 'e-Checklist'. The current location is 'Home > Mitchells Grievson (1 files) > Personal Tax'. Below the location, there are action buttons: 'Up', 'Upload File', 'Download', 'New Folder', 'Notify', 'Move To', and 'Delete'. A table lists the files and folders:

Name	Description	Uploaded	Latest	Approval Type	Status	Total	Size	Owner
Documents						0 files	0 KB	
Files From Mitchells Grievson						0 files	0 KB	
Personal Tax						1 files	7 KB	

The 'Personal Tax' folder is highlighted with a red box. At the bottom right, it says 'Displaying items 1 - 3 of 3'.

- Click on the document name to open the document.  
In Chrome the document will show in the downloads at the bottom of the screen.  
Click the upward arrow and select open document.

The screenshot shows the IRIS OpenSpace web interface with the document 'MG-Personal tax computation' selected. The location is 'Home > Mitchells Grievson (1 files) > Personal Tax > Personal Tax'. The document details are as follows:

Name	Description	Uploaded	Latest	Approval Type	Status	Total	Size	Owner
MG-Personal tax computation	Computation	07/01/2021 12:01:56		e-Approval	Approve		7 KB	Phil Hamby

The document name is highlighted with a red box. At the bottom right, it says 'Displaying items 1 - 1 of 1'. Below the interface, the Chrome download bar is visible, showing 'MG-Personal tax c...pdf' with an upward arrow icon, also highlighted with a red box.

5. The document will then open in a new tab.

CLIENT:	M Grievson	TAX REF :	
YEAR :	5 April 2020	NI NUMBER:	
<b>Personal Tax Computation</b>			
		£	£
<b>Income</b>			NIL
<b>Deductions</b>			NIL
			NIL
<b>Allowances</b>			(12,500)
Personal allowance			£NIL
<b>Tax Borne</b>		NIL	
<b>Income Tax Due</b>		NIL	
Tax deducted at source		NIL	
<b>Total liability</b>			£0.00
<b>Allocation of Allowances and Deductions</b>			
	<u>Non-Savings</u>	<u>Savings</u>	<u>Dividends</u>
			<u>Lump Sum Payments</u>
			<u>Chargeable event gains (with notional tax)</u>

6. If you are happy with the contents of the document and are ready to approve it return to the IRIS OpenSpace tab and click the approve button as shown below

Home mgchartered@gmail.com Account

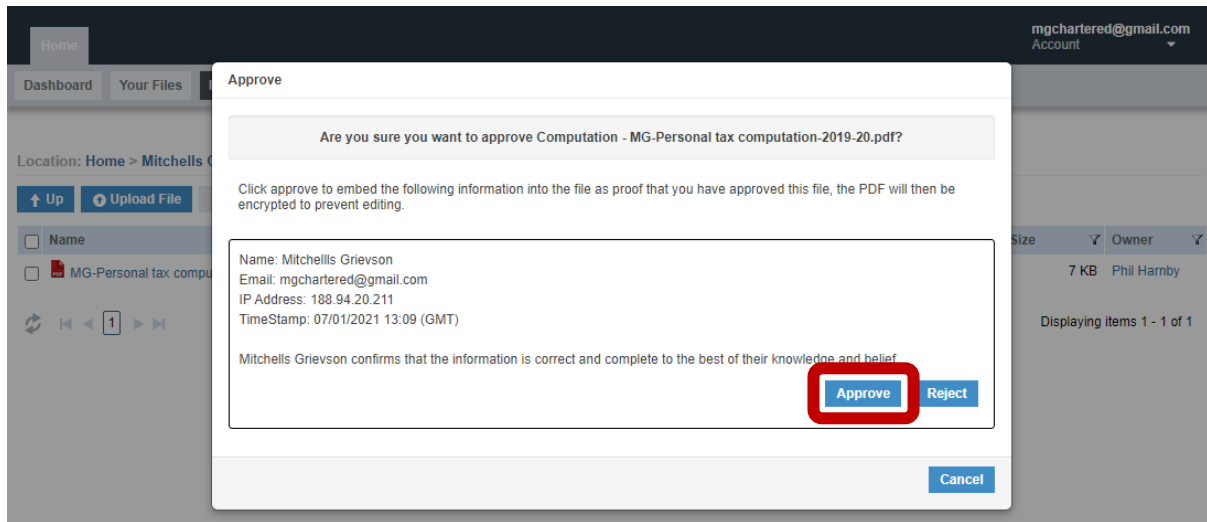
Dashboard Your Files **Files** Invoices Approval Upload File e-Checklist

Location: Home > Mitchells Grievson (1 files) > Personal Tax > Personal Tax

<input type="checkbox"/>	Name	Description	Uploaded	Latest	Approval Type	Status	Total	Size	Owner
<input type="checkbox"/>	MG-Personal tax computati...	Computation	07/01/2021 12:01:56		e-Approval	<input type="button" value="Approve"/>		7 KB	Phil Harnby

Displaying items 1 - 1 of 1

7. The below screen will appear. Read through and if you agree with the contents click 'Approve'



8. The document will now show as approved

