



**J H GREENWOOD & COMPANY**

CHARTERED ACCOUNTANTS

# **Client Portal Getting Started Guide**



Welcome to your guide for setting up, configuring and using your J H Greenwood & Company online portal.

The J H Greenwood & Company online portal is an online collaboration tool allowing you to share documents with your our Practice, safely and securely. The portal also allows J H Greenwood and Company to upload and share documents with you.

You have the ability to do the following using the tool;

- Download and Upload files to and from the Practice
- **Notify** the practice a file has been uploaded
- See who is able to upload to their portal

### Step 1

You will have received an email entitled **J H Greenwood & Company Portal Client Registration**. To activate your account, click on the link in the email and create a password (see screenshot below):



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Activate your IRIS OpenSpace account

Dear Test Data,

Your accountant at IRIS Software SME has created an account for you on IRIS OpenSpace so that you can exchange documents instantly and securely. To activate your account please click <http://dbloxham.irisopenspace.co.uk/account/confirm/f50fc336-5949> and create a password.

If you have any questions regarding IRIS OpenSpace please contact your accountant at IRIS Software SME.

Please note that your use of IRIS OpenSpace is governed by the terms and conditions, details are available here: <http://dbloxham.irisopenspace.co.uk/Home/TermsAndConditions>.

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practicesales@iris.co.uk

iris.co.uk

0844 815 5555

The link will take you to a page where you can setup a password for your **J H Greenwood & Company Portal** account.



# Enter your chosen password

Thank you for registering with IRIS OpenSpace, please enter your password below

Email address	<input type="text" value="@outlook.com"/>
First Name	<input type="text" value="Test"/>
Last Name	<input type="text" value="Data"/>
<hr/>	
New password	<input type="password"/> *
Confirm new password	<input type="password"/> *
<input type="button" value="Set Password"/> <input type="button" value="Cancel"/>	

You, as the client will then see a message confirming the account has been setup along with a button **login to J H Greenwood & Company Portal**. This will take you to [www.irisopenspce.co.uk](http://www.irisopenspce.co.uk). You will also receive an email entitled **Welcome to J H Greenwood & Company Portal**. As a result, you are now ready to log in to **J H Greenwood & Company Portal** and view any documents you have uploaded or need to respond to.

## Email confirmation

If you do not receive the email conformation

1. Check your spam folder.
2. Go to the IRIS OpenSpace website and click '**Forgot your Password**'?
3. Enter your email address and click '**Reset**'.
4. An **Activation Request** email will be resent.



# How to Upload Documents/Back Ups

*Log in via our website at [www.jhgreenwood.co.uk](http://www.jhgreenwood.co.uk)*

*Select upload file from top left of screen*

*Click browse and Select the file(s) you wish to upload*

## IRIS OpenSpace – Security Information

### Overview

IRIS OpenSpace is hosted on the Microsoft Windows Azure platform in their EU zone and therefore fully complies with UK data protection guidelines.

IRIS OpenSpace relies on Microsoft's security procedures to ensure physical protection of our systems.

### User Security

All user passwords are **Hashed** and **Salted**. Hashing means that IRIS OpenSpace only stores encrypted passwords and therefore it is not possible for anyone to view an actual password in the database.

Salting means that even in the instance of a **rainbow attack** is not possible to crack the encrypted password even if someone were to gain access to our user access database which is protected by Microsoft's Windows Azure built in security.

Only the actual user of an account sets their password; not even the system administrator can set, view or change an individual user's password.

The only way a password can be reset is via a uniquely generated password reset link that is emailed to the user.

### File Security

Files are encrypted in transit using **Secure Socket Layer (SSL)** and The **Advanced Encryption Standard (AES)**

## IRIS Software Group Internal Procedures

User account and application data is stored in a separate dataset on Microsoft Windows Azure from files that have been uploaded by users; this ensures that application maintenance and enhancements are done without requiring access to customer files.

We run separate instances of product, with strict procedures to the live instance.



Azure for development and the live and policies in place restricting access

This protects both customers and IRIS staff from accidental or unauthorized access.

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