CUSTOMER GUIDE

IRIS Community

Getting started, managing cases, managing users and renewals

FOR PRACTICE ENGINE, DOC.IT, STAR AND IFM CUSTOMERS

Effective beginning of November 2026

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IRIS Software Group

About the IRIS Community

The IRIS Community is a portal where you can create and monitor cases with our dedicated teams. Having an account tells us that your firm has approved you to engage with us, so we can help you quickly and securely.

Who this guide is for

This guide applies to Practice Engine, Doc.it, Star and IFM customers only, for now. The process described here takes effect at the beginning of November 2026.

Using other IRIS products? If you need technical support for any product not listed above, please keep using the current ticketing system for now. Nothing changes for those products at this time.

How it works at your firm

Each firm has a nominated **Community Administrator**. They add colleagues to the Community and decide who is authorized to contact IRIS Support. If you need access, your Community Administrator is the person to ask.

1 Accessing the IRIS Community

Your first login, step by step.

Getting access

1. Ask your firm's Community Administrator to add you as a contact.
2. You will receive a welcome email containing your username and instructions for logging in.
3. Go to **oneiris.my.site.com/iris/login** and log in.
4. On your first login you will be asked to create a password. Once set, your account is activated.

Useful to know

- **Forgotten your password?** Use the **Forgot Your Password?** link on the login page, or reset it at oneiris.my.site.com/iris/secur/forgotpassword.jsp.
- **Not sure who your administrator is?** Once logged in, open the **Contacts** page to see who it is.
- **Can't log in and don't know your administrator?** Contact the IRIS Service Team or your account manager and they will help.

Access is not the same as authority to raise cases

To raise a Technical Support case you also need a **Support Entitlement**, which your Community Administrator grants. If you can log in but can't raise a technical case, ask your administrator to check your entitlement.

2 Logging and managing cases

Raise a Technical Support case and keep track of its progress.

Raising a Technical Support case

1. Log in and go to the **Home** page, the **Assets (Products)** page, or open the details of a specific asset.
2. Find the **Create Case** section. The options shown will vary depending on your selections.
3. Select **Technical Support** as the **Team**, then the **Case Type**, and the **Priority** if offered.
4. Choose the **Asset** the case relates to and the relevant **Category**. For incidents, select the **Software Issue**.
5. Enter a short **Subject** and a full **Description**, attach any supporting files, and submit.

When to use Technical Support

Raise a Technical Support case for license activation, or when you need technical help with our products. Only contacts who have a Support Entitlement can raise these cases (see Section 3).

Tips for a faster resolution (Technical Support)

Do this	Why it helps
Use a clear subject. For example, "Unable to access CRM dashboard – Error 403 on login" rather than "Issue with system."	Helps us triage and prioritize your case quickly
Lead with the key details: what the issue is, when it started, who is affected, where it is happening and how severe it is.	Gives the team what they need without having to ask
Include evidence: screenshots or recordings, the exact error text, steps to reproduce, and any recent changes such as updates or new hardware.	Speeds up diagnosis
Keep it easy to scan. Use short bullet points or numbered steps.	Makes your message easier to act on
Reference earlier cases if this is a repeat issue or follow-up.	Gives us the history straight away

Please don't upload personal data

Please do not upload documents containing personal information. Uploads are subject to the IRIS Privacy Policy and Terms and Conditions.

Tracking and updating a case

1. Open the **Cases** tab to see the cases you have raised. Community Administrators also see cases raised by colleagues.
2. Select the **Case Number** or **Subject** to see the case history so far.
3. To add information, or to let us know the issue is solved, go to **Case Comments**, select **Add New Case Comment**, enter your comment and select **Save**. The IRIS Service Team is notified automatically.

Understanding case statuses

Status	What it means
New / Assigned	Your case has been created and is waiting for, or has been assigned to, an agent.
In Progress	The IRIS team is working on your case.
On Hold	We need more information from you before we can continue.
Resolved	We have provided a resolution to your case.
Closed	Your case is complete.

If we need more from you, a comment is added to your case and an email is sent to the person who raised it. Please respond with a comment as soon as you can.

3 Community Administrator: managing your users

For the person nominated to look after your firm's Community contacts.

Your role

The Community Administrator manages your firm's contacts in the IRIS Community and keeps them up to date. You decide who can log in and who is authorized to contact IRIS Support. This protects your firm, because only approved people can discuss information that may be personal, sensitive or confidential. As an administrator you can also view every case raised by your colleagues on your firm's behalf.

Two terms to know

Term	What it means
Contact	Anyone who needs portal access must first be added as a contact
Support Entitlement	Authorizes the contact to raise Technical Support cases, linked to the products they can contact us about

Add a new user

1. Go to **Contacts** and click **Create Contacts**.
2. Enter the contact's information.
3. Click **Create**.

Once the contact is created, you can assign their entitlements straight away:

1. Click **Next**. All available entitlements are shown.
2. Select as many entitlements as you would like.
3. Click **Save**.

Update entitlements for an existing contact

Do this when someone changes role, or leaves your firm.

1. Go to **Contacts** and click on the contact.
2. Click **Edit**, then click **Next**.
3. Add entitlements by ticking the checkbox, or remove them by unticking it.
4. Click **Save**.

Check who has access

The **Contacts** page lists everyone added to the portal. The Community User column shows each person's status:

Status	Meaning
Community User	Has access to the portal. Needs an active Support Entitlement to create a case
Not a Community User	Has no access to the portal
Community Administrator	Is assigned as an administrator for your firm

Good practice

- Review your contacts and entitlements regularly, and whenever someone joins, moves team or leaves.
- Only give entitlements to people who should be discussing your firm's data with IRIS.
- Keep an eye on the **Cases** tab so nothing is left waiting On Hold.

Choosing your Community Administrator

Look for someone who...	
Is a named, permanent member of staff	Use their own work email, not a shared mailbox
Is trusted to decide who can contact IRIS	They control access to your firm's information
Knows when colleagues join, move or leave	So entitlements stay accurate
Is comfortable seeing all of your firm's cases	Administrators can view every case colleagues raise

> **Changing your administrator?**
>
> Contact the IRIS Support Team or your Customer Success Manager. If your administrator is unavailable and you can't raise a case, they will be able to help.

4 Your renewals journey

A simpler, clearer and more consistent renewal experience.

What this means for you

Your renewal information will arrive earlier and in a more consistent format, with clear term options and direct access to our Renewals team whenever you need support or want to make a change.

What to expect

01
Renewal notice

Around the start of your applicable renewal window, you will receive an automated email with your renewal quote attached as a PDF.

02
Flexible term options

Your communication may include a standard continuation and a multi-year alternative. Customers already on a multi-year agreement may receive a longer-term option.

03
Choose what works

If the standard continuation meets your needs, no DocuSign is required. Contact us if you want to discuss term, quantity, product or commercial changes.

04
Confirmation and billing

Once the renewal route is finalized, we complete the order and billing process. Multi-year or revised arrangements requiring acceptance will be sent through DocuSign.

Your options at a glance

Option	What it means
Continue with your standard renewal	Your renewal proceeds in line with the applicable agreement and notice terms. No DocuSign is required for a straightforward standard continuation.
Select a multi-year option	Choose greater pricing predictability and longer-term planning certainty. We will issue the agreed documentation through DocuSign for signature.

A secure and supported experience

How to recognize your renewal communication	Need a change?
• The renewal email may be system-generated and include a PDF quote attachment. • DocuSign is used when a multi-year or revised arrangement requires your acceptance. • If anything looks unfamiliar, contact your IRIS representative before opening or signing.	Reply promptly to your renewal email so we can review your request before the applicable contractual deadline. We are here to help you choose the option that best supports your organization. If you have any questions, please reach out to us at **+1 631-323-6147**.

This guide is a high-level overview. Your renewal remains subject to your applicable agreement, notice provisions, product terms and the final quote issued by IRIS.