

Microsoft Office Online: Troubleshooting and Best Practices

Editing a Letter in Office365 Online

IRB 9.0 allows for viewing and editing of Microsoft Word, Excel, PowerPoint, and Visio documents using Office 365 Online. Using this feature to edit correspondence to study teams can save time and reduce clutter on your computer.

Known Limitations

The following are known limitations of editing documents in Office Online:

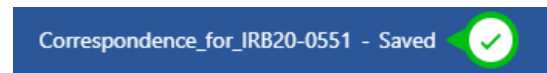
- Locked forms cannot be edited online
- Quick Parts are not available in Office Online
- Some formatting options are not available in Office Online

The option to download a document and upload a revised version remains available.

Best Practices

When you have finished reviewing the study and you are ready to create the letter...

1. Select the Prepare Letter activity on the Workspace.
2. Pick the letter template and Generate the letter.
3. Beside the name of the generated letter, click the ellipsis and select "Open in Word Online."
IMPORTANT! Be sure to leave the "Prepare Letter" pop-up open while you are making changes to the letter.
4. Make any necessary updates to the letter. Do not close the letter until the blue bar at the top indicates that the letter has been saved.



5. Close the saved document and wait a few seconds to ensure all background processes have finished. Return to the Prepare Letter pop-up and click OK to execute the Prepare Letter activity.
6. Select the Send Letter activity.
7. View the PDF version of the letter to verify that all changes saved correctly and click OK to execute the Send Letter activity.

Troubleshooting

Access to a Document is Denied

If you generate a letter and encounter an "Access Denied" error when trying to open it in Office Online, it may be that background processes to set permissions on the document have not yet completed.

Typically, closing the letter and waiting a moment before attempting to reopen it will resolve this problem.

Letter revisions not saving properly

The PDF version of the letter is created when the "Prepare Letter" activity is executed, not when you click Send Letter. If the letter is open or there is any lag in saving the letter when the Prepare Letter activity is executed (i.e. when you click "OK" on the Prepare Letter pop-up), changes may not be saved in the PDF version of the letter.

To avoid this issue, be sure to:

- leave the Prepare Letter pop-up open while you are editing the letter,
- confirm that the blue bar at the top of the document indicates that it has been Saved before closing the letter,
- wait a few seconds after closing the letter to allow for background processes to complete, and


- return to the Prepare Letter pop-up after editing the letter to click OK and complete the activity.

Locked out of editing

If a document is open, the system automatically locks it from being opened in other places to prevent edits in progress from being overwritten. This may happen if you close the Prepare Letter activity while editing a document, and then click Prepare Letter again without closing the document.

A locked document will appear with a lock icon next to the its name:

Draft letter:

 Correspondence_for_IRB20-0551.doc(0.04) ...

If you see the lock icon:

- Close any/all instances of the “Prepare Letter” activity.
- Confirm that you do not have the letter open elsewhere (i.e. in another tab).
- Save the most recent copy of your changes to your computer to ensure your edits are not lost if you need to re-upload the document.
- Click “Prepare Letter” again and the lock icon should be gone, allowing you to edit the document in Office Online or upload a revised version.

Office 365 Use with Compare Mode

Compare mode will indicate when a document has been added, removed, or modified since the last time the study was submitted to the IRB.

For additional information about the use of Compare Mode, see [Viewing Changes to a Submission](#) in the [IRB Study Reviewer’s Guide](#).

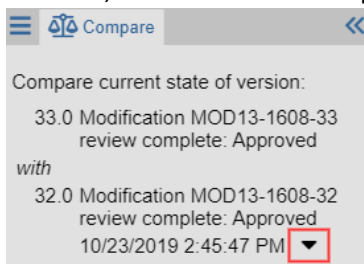
Troubleshooting

What to do if Compare Mode does not indicate that changes have been made to a document

Usually, this is caused by ESTR comparing incorrect versions of a submission.


If changes are not displayed as expected,

- Check the versions of the study being compared in the upper-left corner of the page. To compare different versions, click the downward-pointing arrow:



- Clicking the document history will display all versions of a document. This is the most reliable way to determine whether changes have been made and will display all versions of the document for comparison.

* Attach only the Research Protocol or relevant Request Form (see documents below):

Document	Category	Date Modified	Document History
View 	IRB Protocol	6/17/2020	History