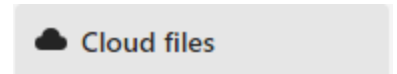
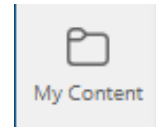


SharePoint Guidance for Research Teams

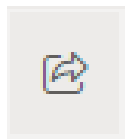
Accessing Your Files & Folders

- click on a link if you were sent one
- go to www.office.com and login to nhs.net account, then go to 'My Content' and 'Cloud files' and select the workspace or document you need, or search.
- once open, Bookmark or Favourite the site.
- from Teams, go to Files, right click, and select 'Open in SharePoint'



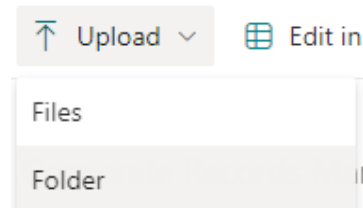
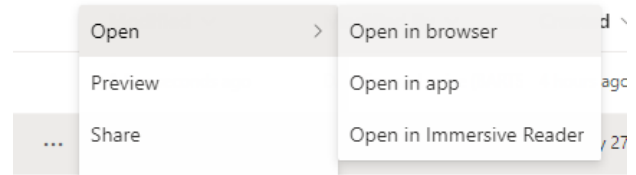
Sharing Files & Folders

Click the 'share' icon, and type in the email address of the person you are sharing the file or folder with



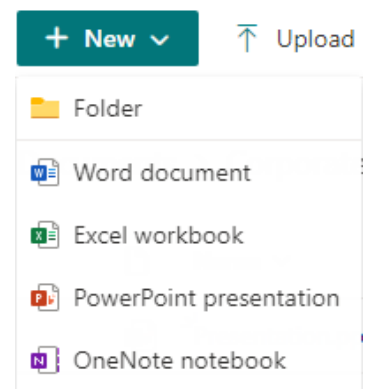
Opening Files

- Open in browser – click on the file name
- Open in desktop app – Click on the 3 dots and select 'Open in app'



Uploading Folders & Files

Click 'Upload' and select either 'Files' or 'Folder', then navigate to the documents you want to upload and select 'Upload'.



Creating Folders and Files

Click 'New' and select the appropriate option from the drop down. You can create folders and Microsoft documents

Patient Identifiable Information (PID)

Barts uses the NHS shared tenant which is approved for patient identifiable information. If using a QM tenant, contact Mays Jawad and Paul Smallcombe for queries relating to SharePoint while the Data Safe Haven is out of action:

m.jawad@qmul.ac.uk
p.smallcombe@qmul.ac.uk
















File and Folder Structure and Naming Good Practice Guidance

Records should be stored according to function / activity or subject. Use the JRMO SOP 45 for a checklist, and the structure below for best practice

Names should:

- be relevant, descriptive and easily understandable to all members of staff, including new staff.
- be meaningful. Avoid terms like 'General' and 'Misc'.
- be consistent across documents and folders
- avoid abbreviations where possible and explain them in the folder name if you can't.

- ✓  Main Study File (Name)
 -  Administrative Information
 -  General Correspondence
- ✓  Trial Master File
 -  Investigator Brochure
 -  Investigator Site Files
 -  Manuals
 -  Patient Files and Case Report Forms (CRFs)
 -  Pharmacy Investigator Site File
 -  Safety Reports
 -  Site Files
 -  Study Protocol and Amendments
 -  Study-related Training

Supported File Types

Most file types are accepted (.pdf, .xlsx, .csv, .docx, .tif, .jpeg). DICOM files are also supported by SharePoint. If unsure about any file type, ask Corporate Records.

Preparing to Archive

- Organise the files according to the structure to the left, adding any subfolders as required.
- Expand all zip files
- Export all data from relevant patient databases and place in Patient Files folder.

Further Support & Contact Information

For FAQs, how-to-videos and more resources, including how to request a Team or SharePoint site see the Staff Engagement Portal:

https://nhs.sharepoint.com/sites/R1H_M365StaffEngagementPortal

If you have any suggestions for this guidance, or any questions or queries about using SharePoint, get in touch at the email address below:

records.management@nhs.net

