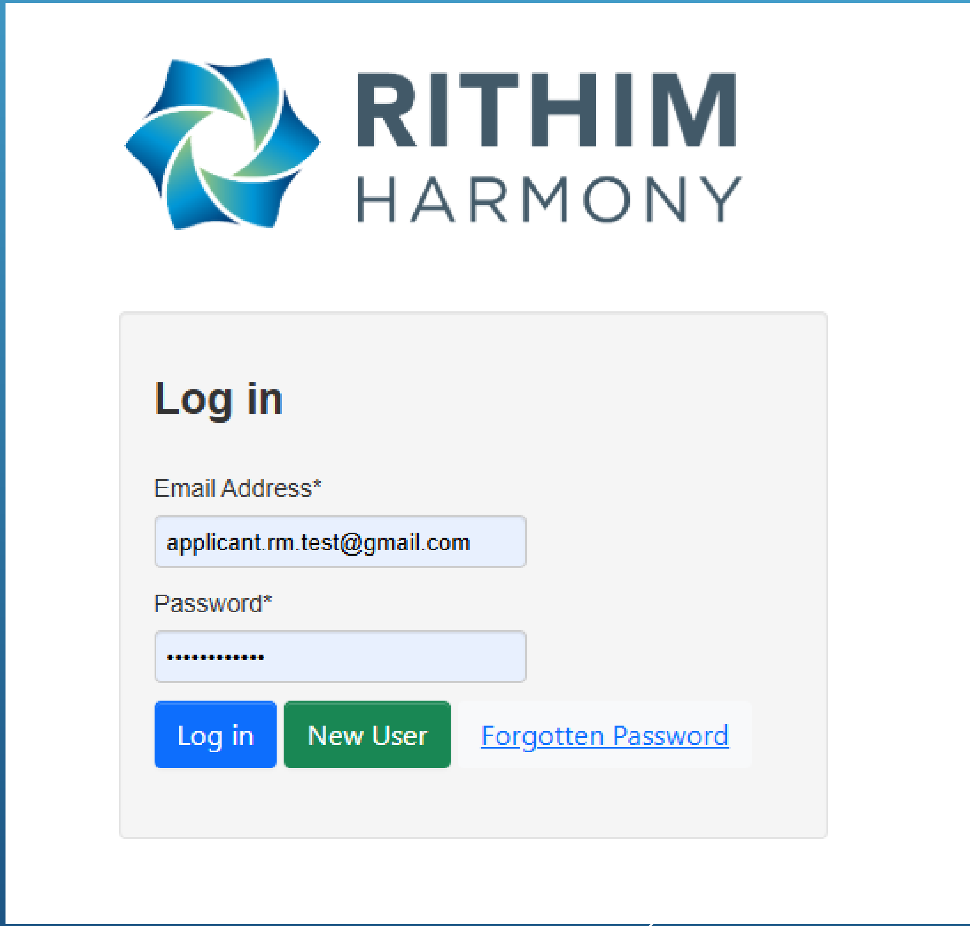
RITHIM HARMONY – IMPORTED PROJECTS GUIDE

USER REGISTRATION AND PERSONAL PROFILE (NEW AND EXISTING USERS)

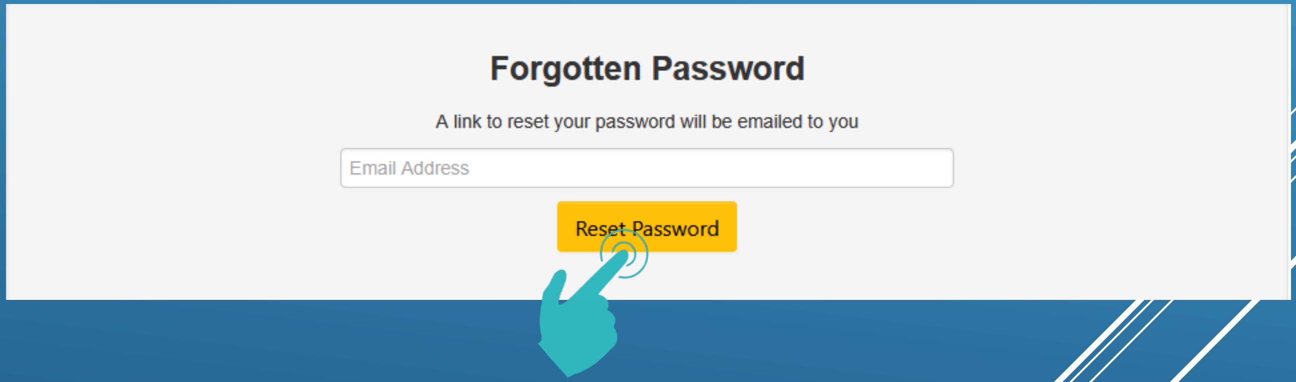
EXISTING HARMONY USERS

- Users who have already been active in Harmony can log-in using their existing credentials at https://apply.rithim-harmony.ca
- Existing users can proceed to Slide 6
- New users can proceed to the next slide



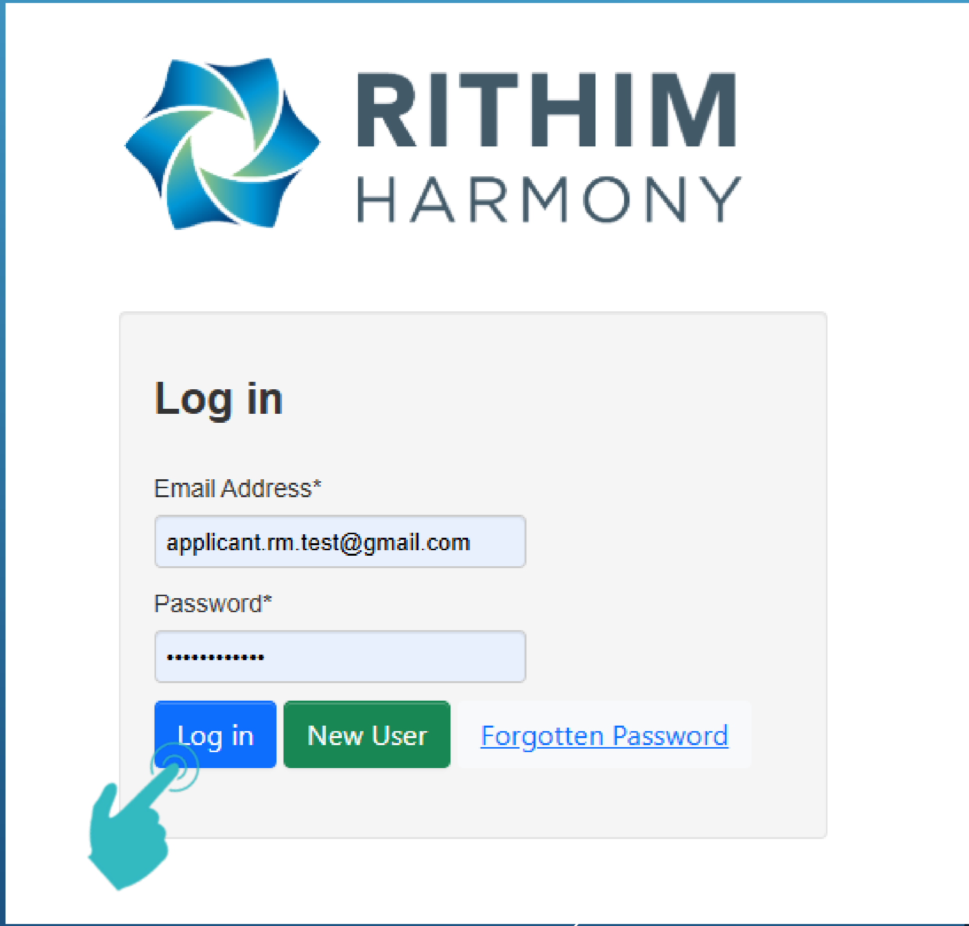
NEW USERS TO HARMONY

- You will have received an email(s) notifying you of any existing UofM projects that have been imported into Harmony with you listed as Principal Investigator
- Click the link in the email to begin verifying your account. **For users with multiple projects, this step is only required once**
- You will be taken to the Harmony system and immediately prompted to reset your password
- The email noted above is already associated with your Harmony account. Enter this email address and click "Reset Password"
- You will receive another email with a link to allow a new password to be set
- Your account will now be fully activated in Harmony



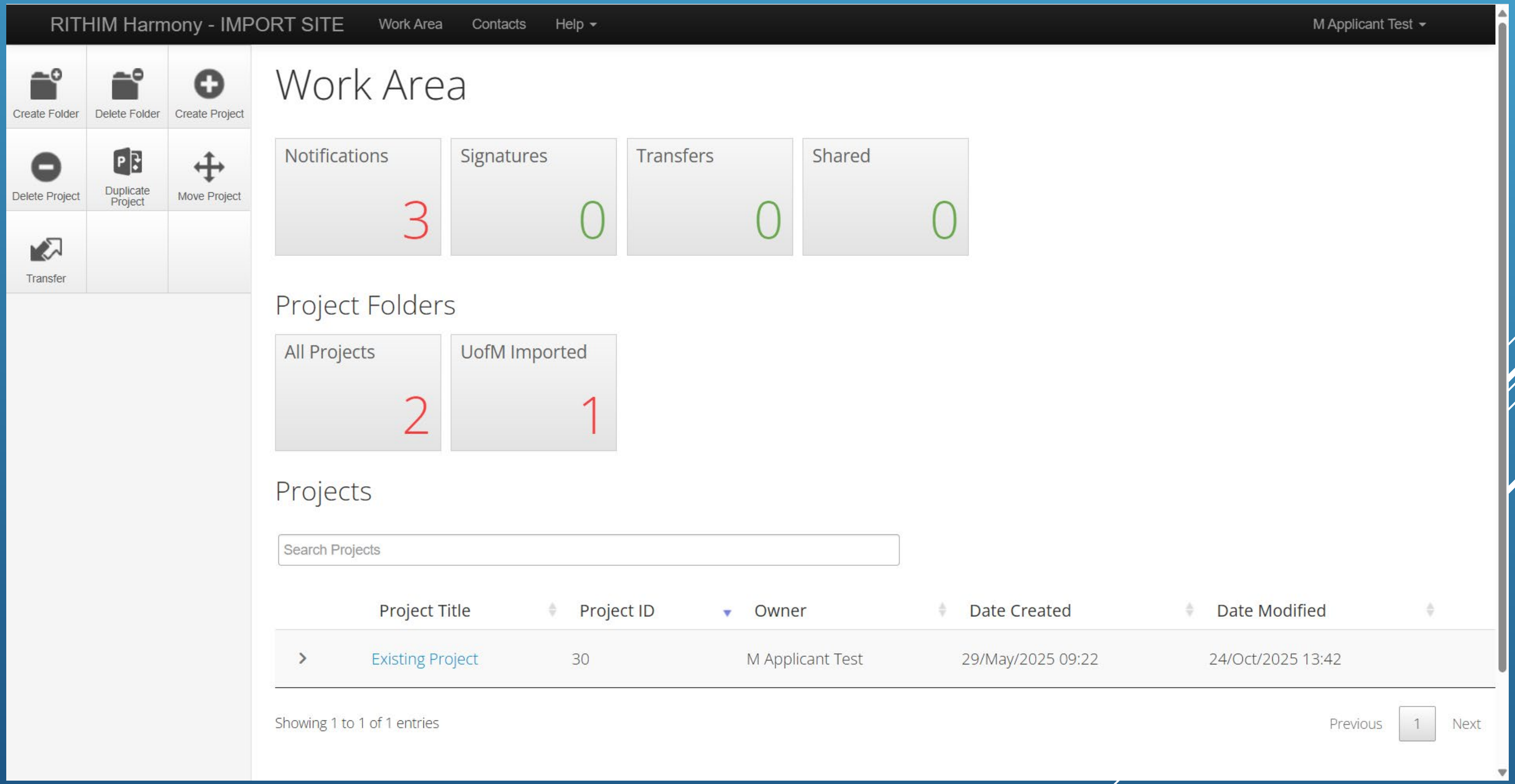
NEW USERS TO HARMONY

- Once your account is fully activated, proceed to log-in using your email and newly created password at https://apply.rithim-harmony.ca



SUCCESSFUL HARMONY LOG IN

- A successful log in lands the user in their Work Area
- Existing users may see already existing projects, notifications, etc. For new users, most of these values will be zero. All imported projects can be found by clicking the UofM Imported tile
- **All Principal Investigators must complete and submit a Personal Profile form to finalize project validation**
- Existing users who have already submitted a Personal Profile form can proceed to slide 14. All other users proceed to next slide

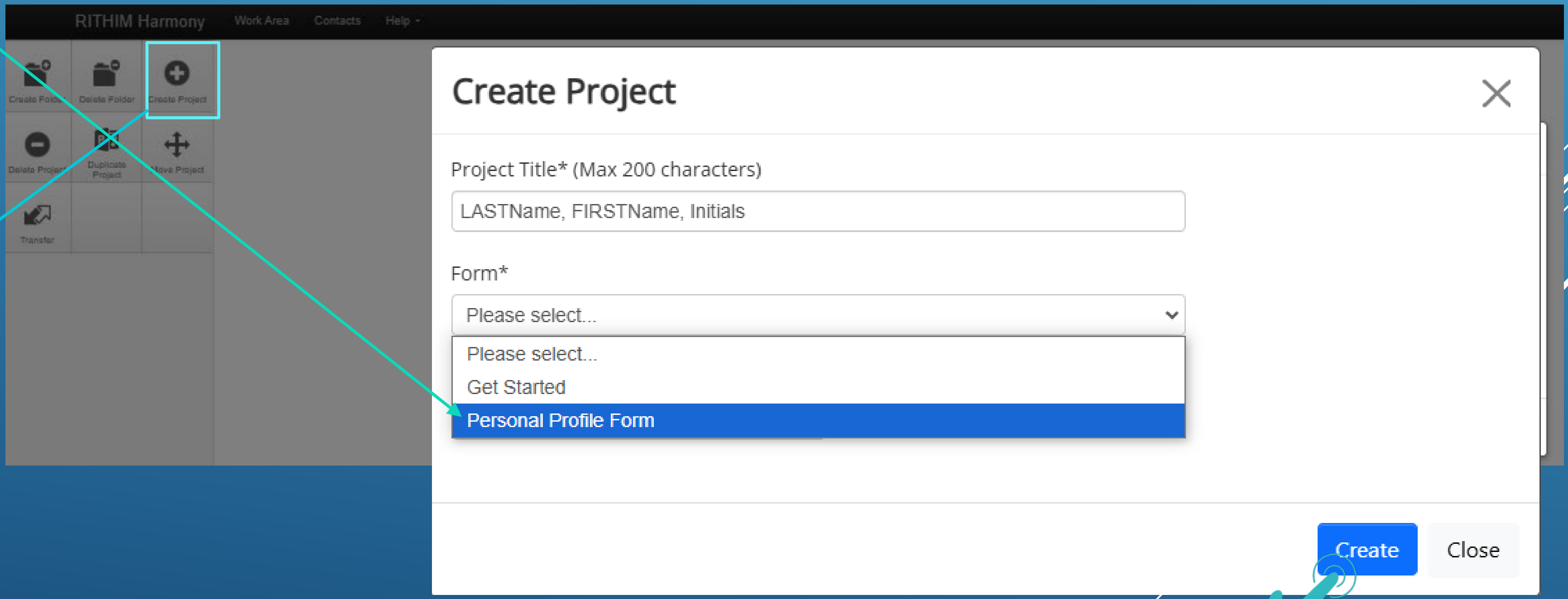


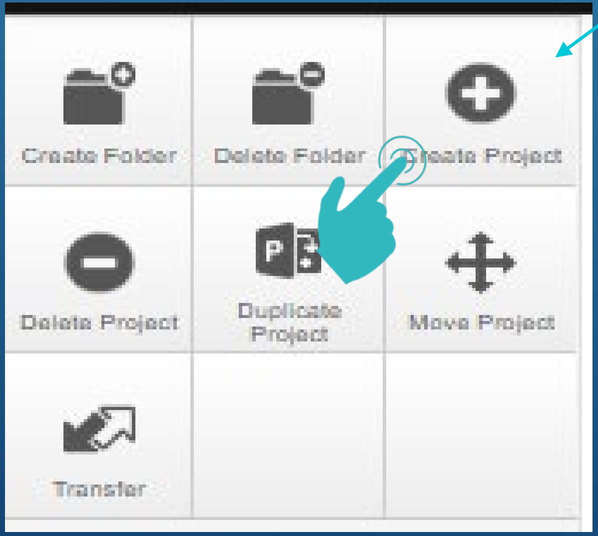
PERSONAL PROFILE FORM

- To finalize project validation, Principal Investigators will be required to complete and submit a Personal Profile form. The Personal Profile Project ID will be requested during validation
- The Personal Profile is a single-creation form with an annual update that stores information and certifications for applicants for Reviewer use. In this way, the applicants simply reference the Personal Profile Project ID in application forms instead of uploading the information to each application
- More information about the Personal Profile form can be found at https://rithim.ca/harmony/personal-profile-requirements
- **NOTE:** Personal Profile forms may be created by another user (e.g. Research Coordinator on behalf of PI) as long as the individual named within the form is the user account that signs and submits

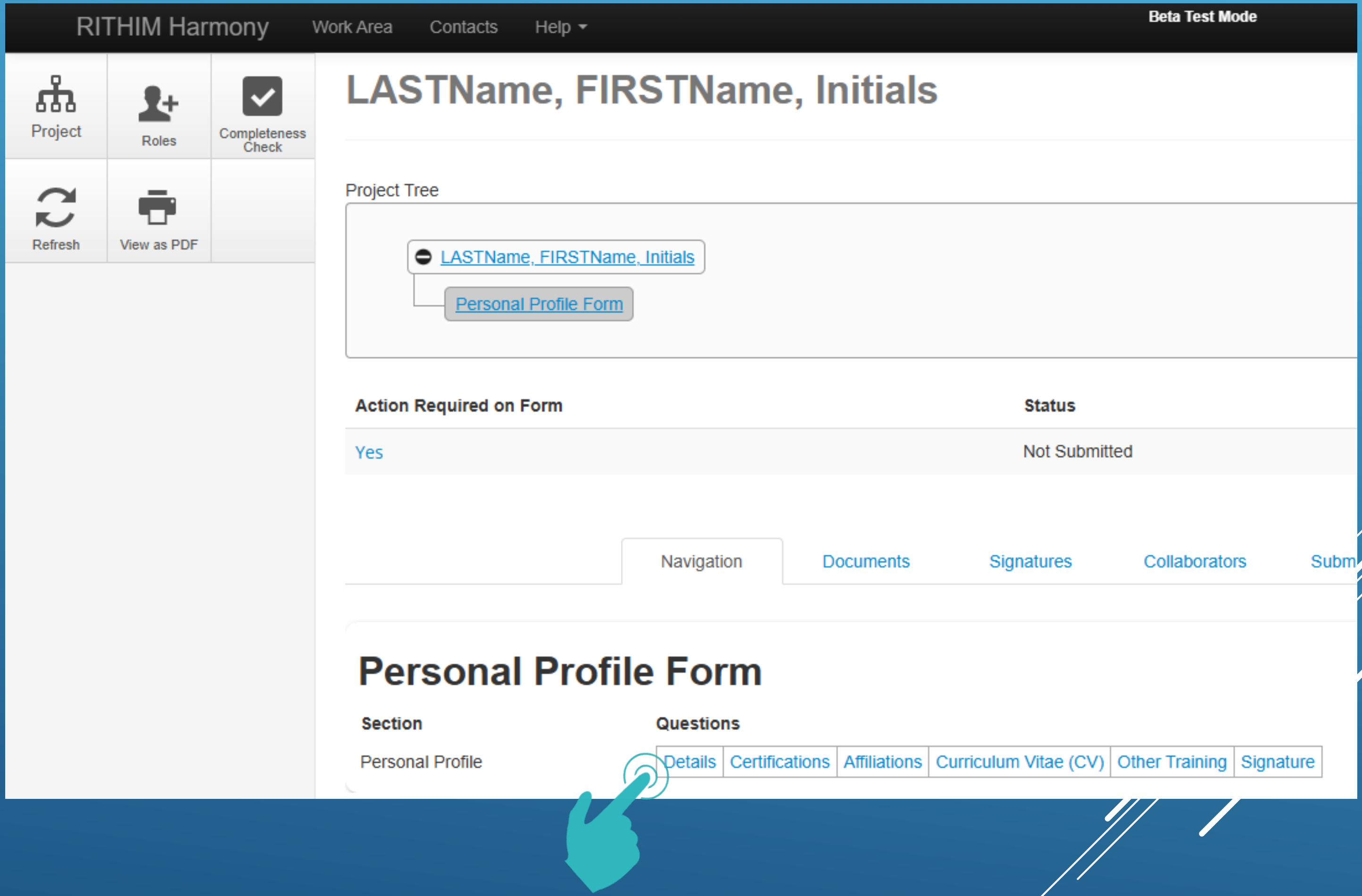
PERSONAL PROFILE FORM

- From the Work Area, select “Create Project” Action
- Enter your Lastname, Firstname in the Project Title
- Select “Personal Profile Form”
- Click “Create”

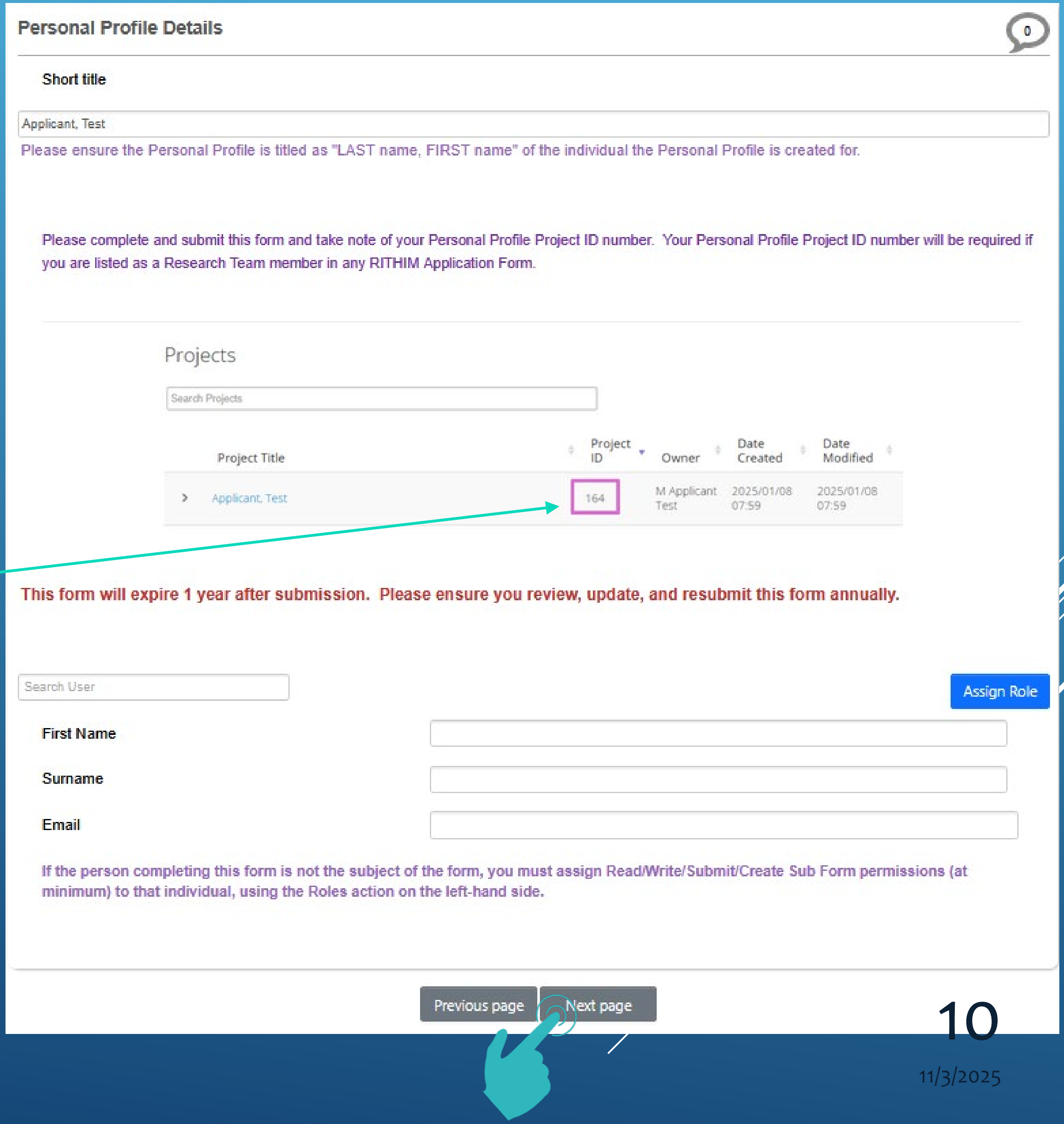




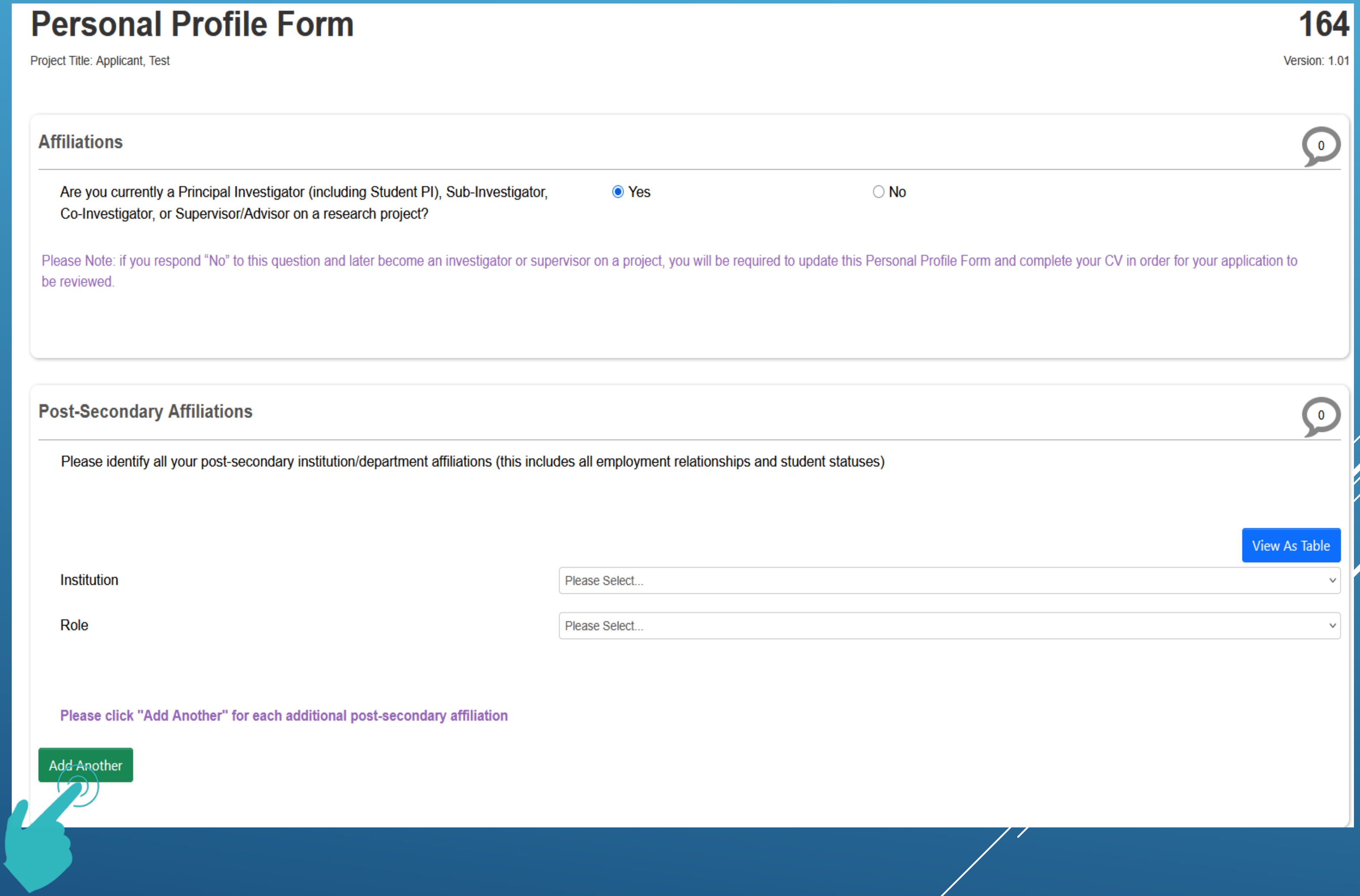
- You will land on the Personal Profile Page, where you can select the “Details” Questions Page to begin



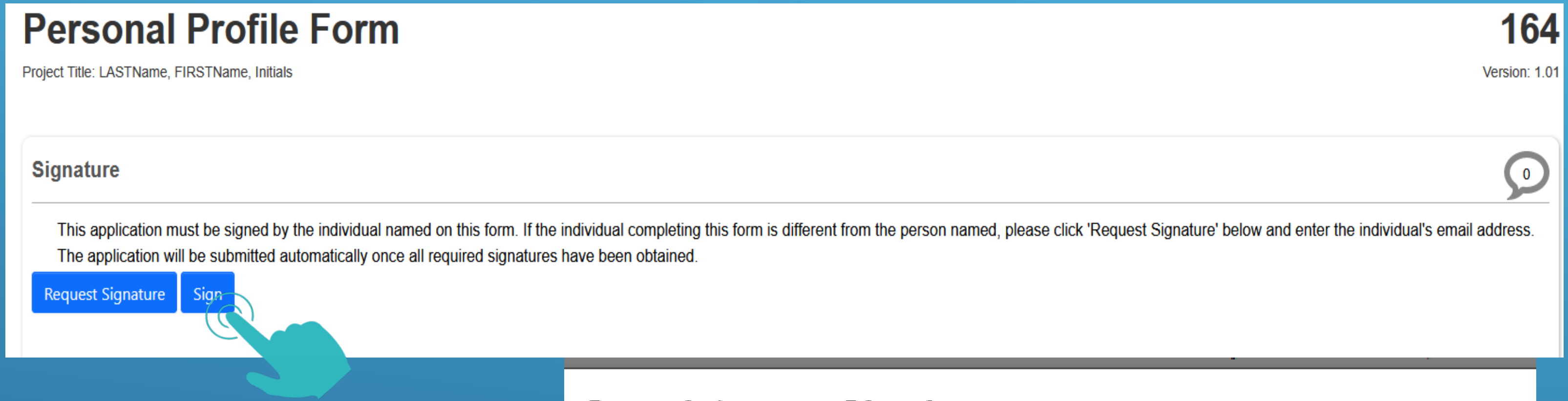
- You will complete each area of the Personal Profile form and navigate to the next Questions Page by clicking “Next Page”
- Note the information about where to find your Personal Profile Project ID

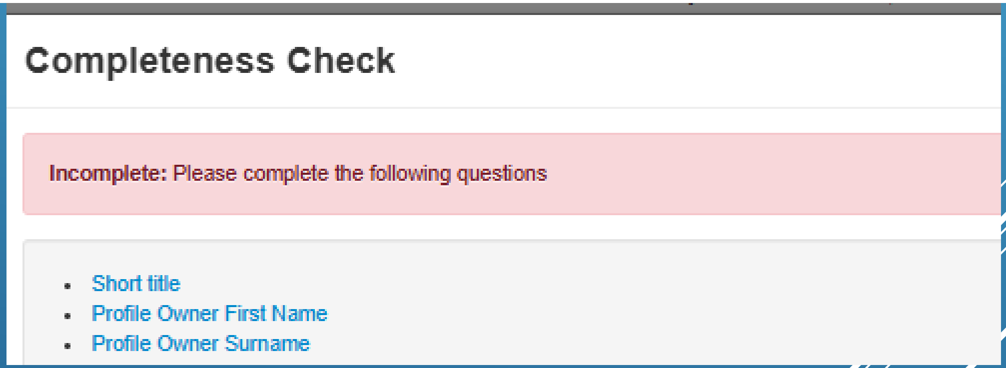


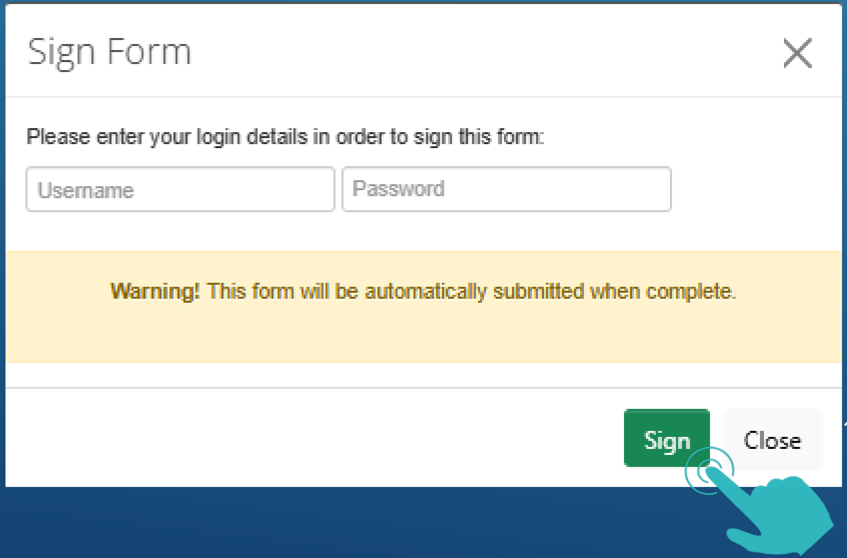
- Principal Investigators are required to enter more information in their personal profiles
- In both the Personal Profile Form and a Health Research Application, some questions can be answered more than once to capture appropriate detail
- For example, if you have multiple post-secondary affiliations institutions, enter the first one and then select “Add Another” to enter more



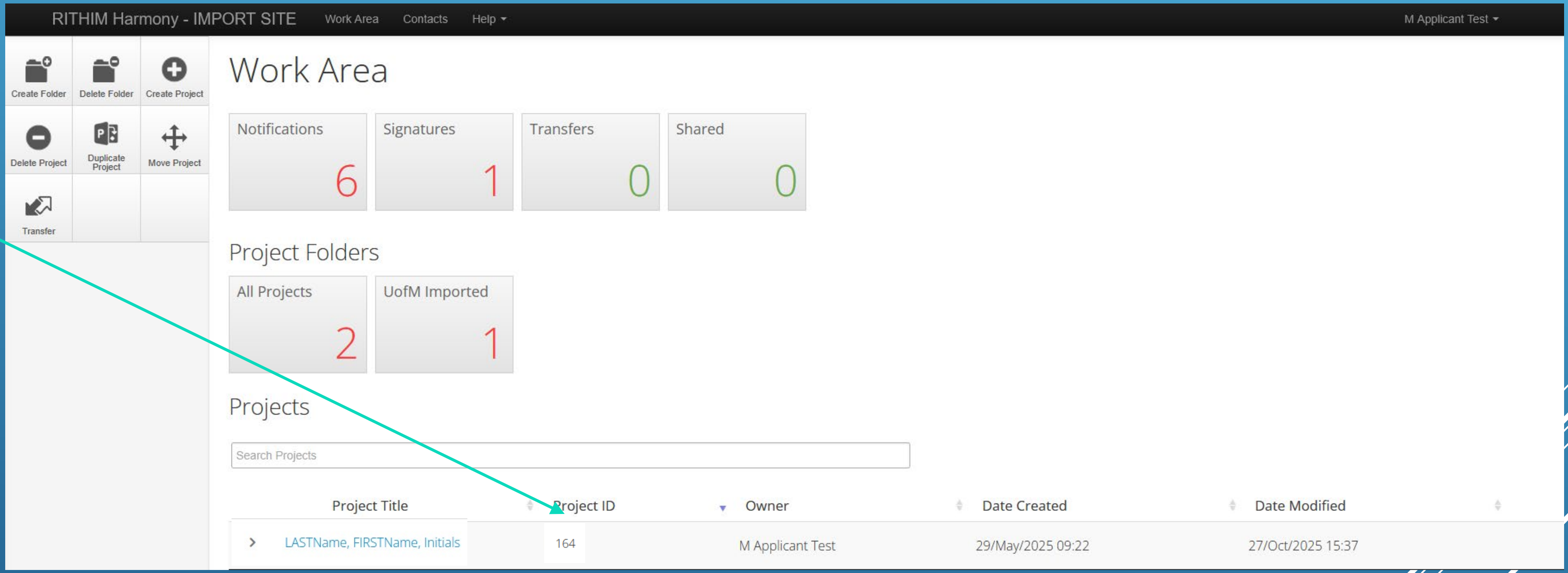
- Upon completion of all required information, the Personal Profile must be electronically signed.
- Click “Sign”.
- Harmony will perform a Completeness Check to ensure all required questions have been completed
- Once the Completeness Check is passed, Sign the form by providing your Harmony Username and Password and click “Sign”





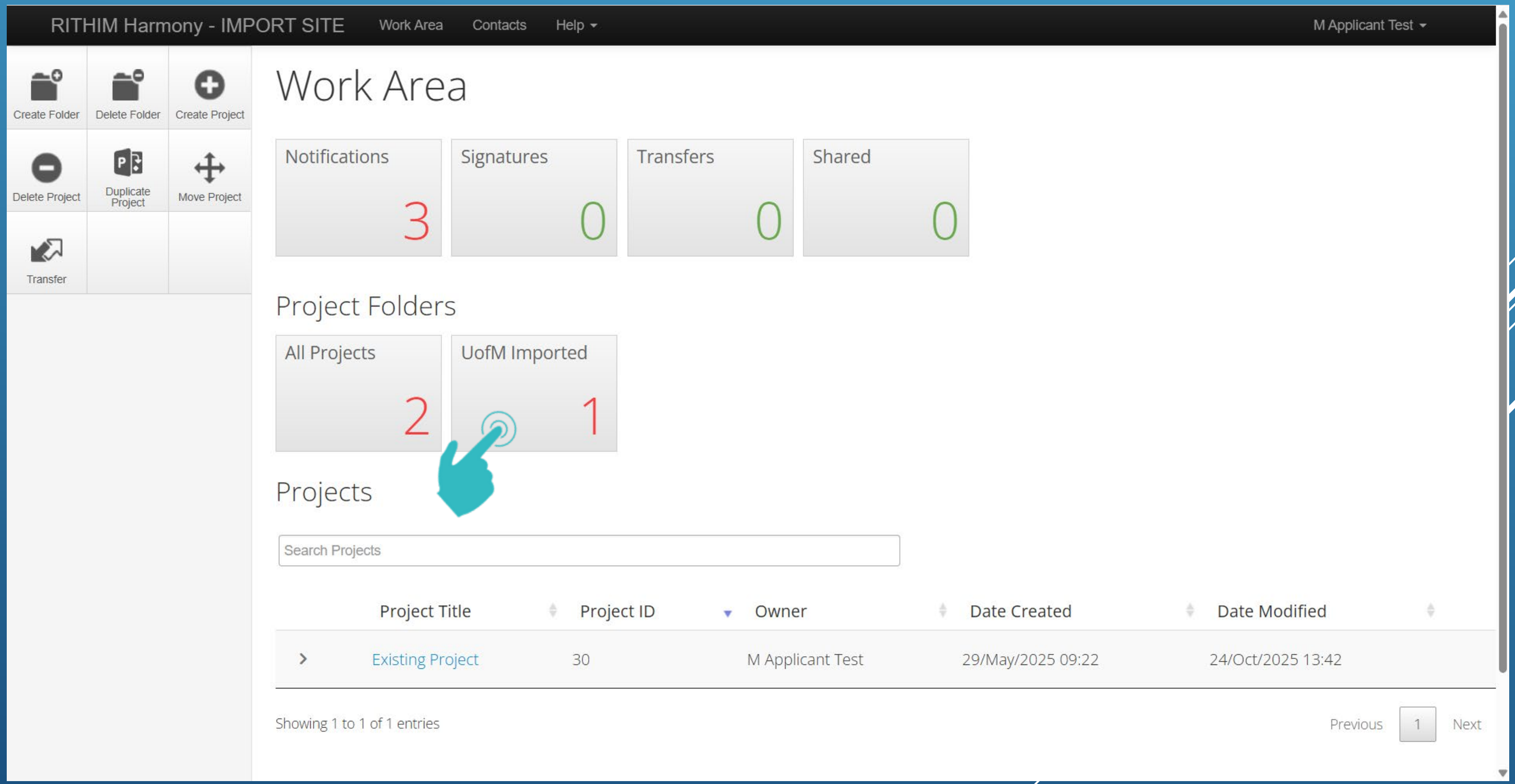


- Once your Personal Profile is complete, you will see it in your Work Area along with the Project ID you will be asked for during project validation and for any new applications of which you are a Research Team member



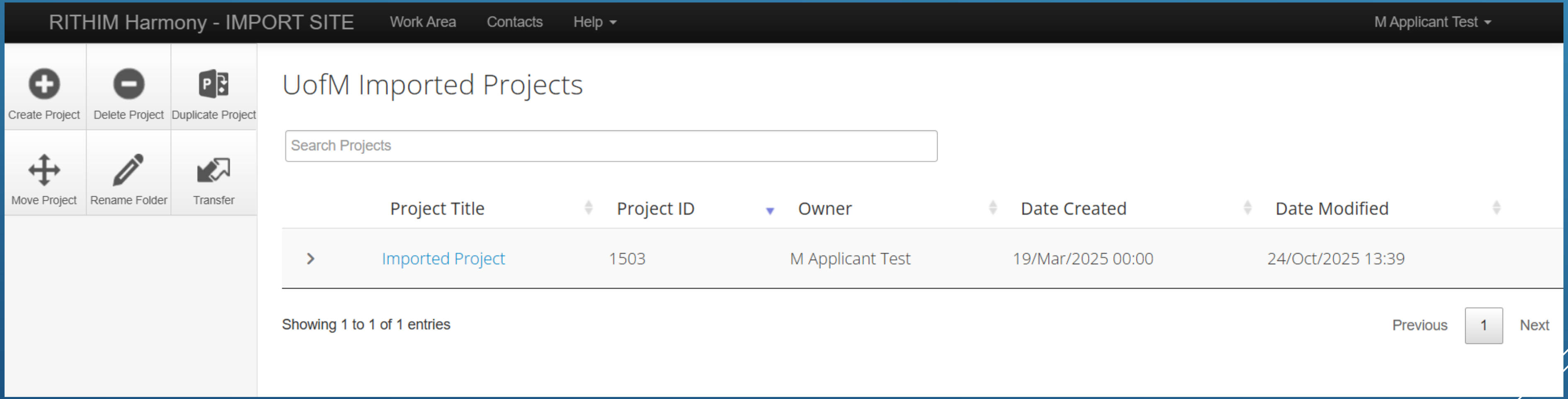
SUCCESSFUL HARMONY LOG IN

- Both new and existing users will have a folder titled "UofM Imported"
- Click this folder to view your imported project list



IMPORTED PROJECTS LIST

- All successfully imported projects where you are listed as the Principal Investigator will appear here



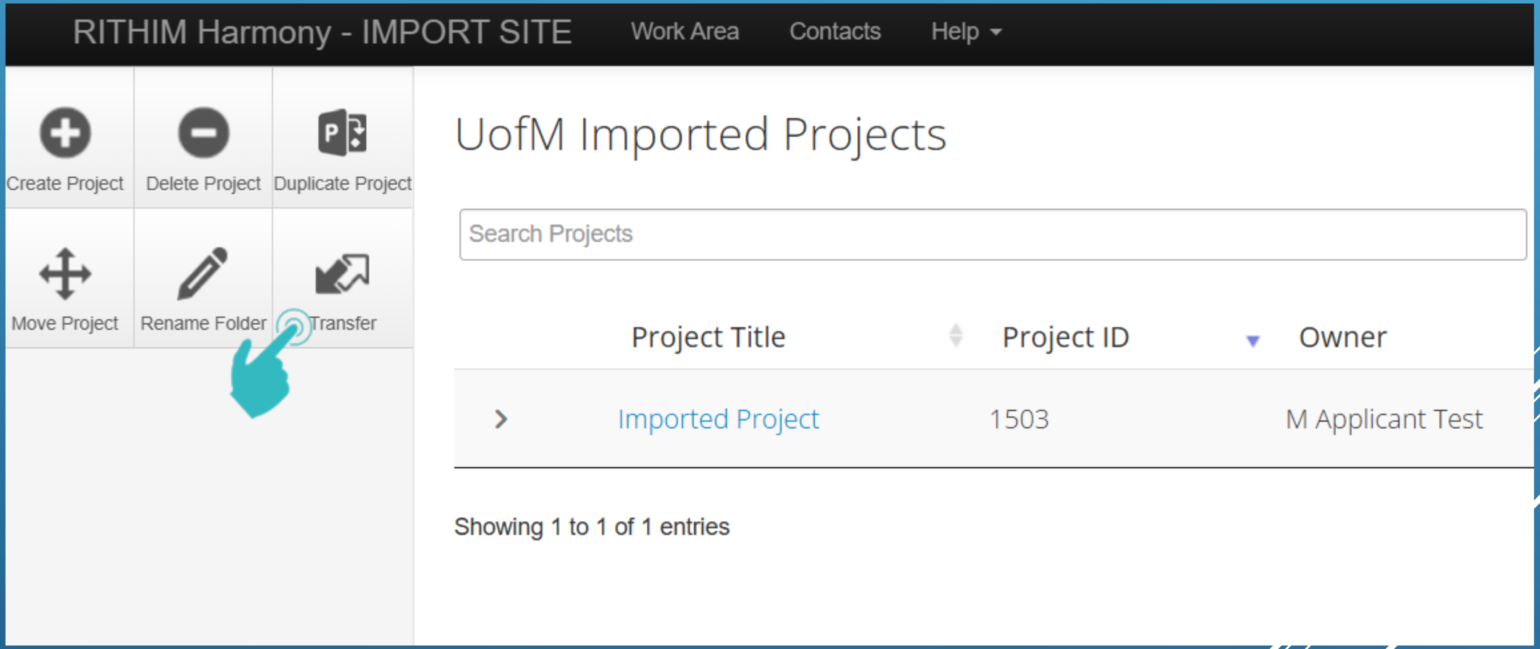
MANAGING IMPORTED PROJECTS

- Other Harmony users can easily assist with projects in the system in two ways

1. You may fully transfer ownership of the project (you remain as PI) to grant someone full access to the project
2. You may share Role Permissions with a user to invite them to collaborate with various levels of project access

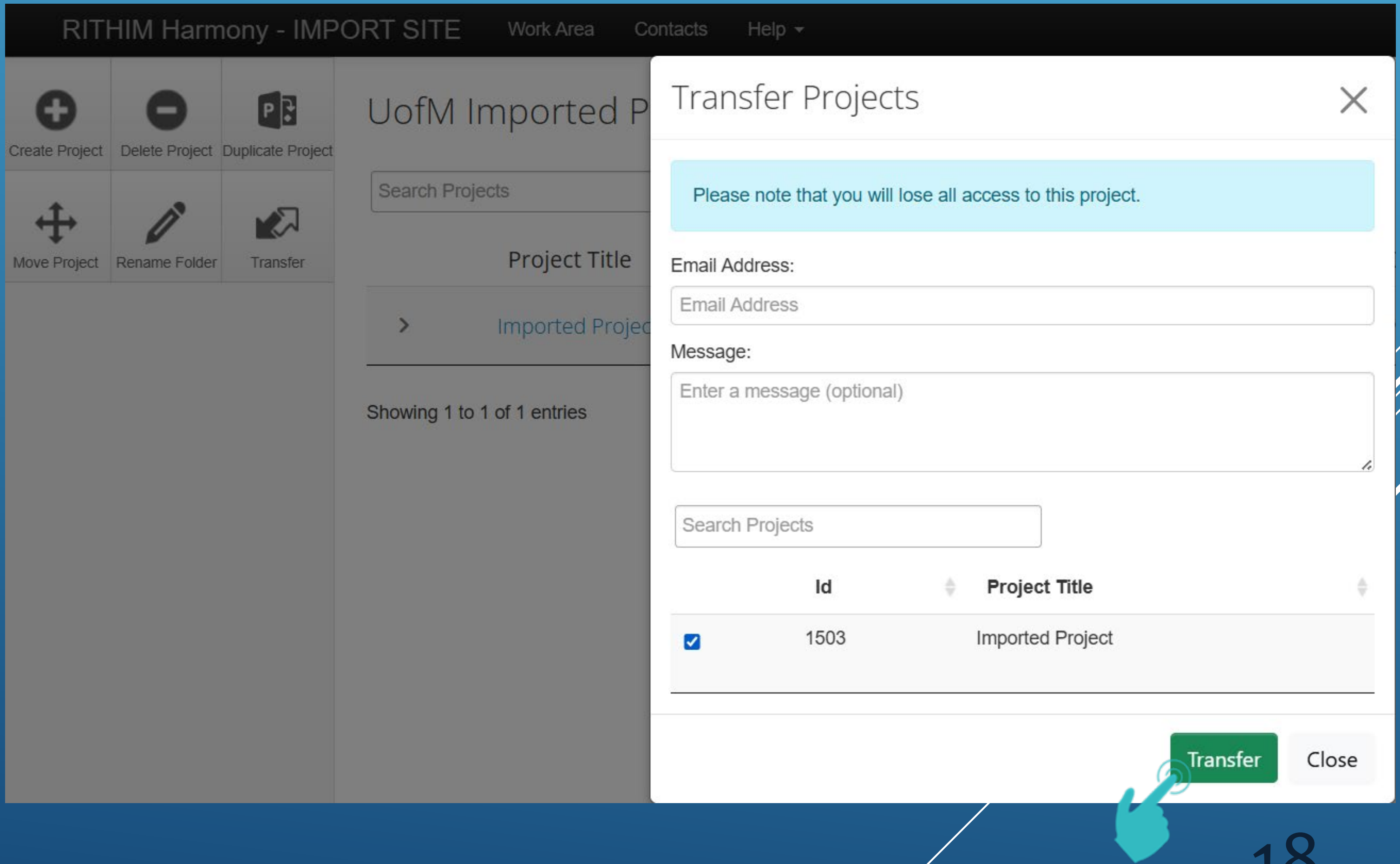
TRANSFERRING IMPORTED PROJECTS

- Transferring ownership of projects may be desirable for those PIs with multiple imported studies and Research Coordinators or other team members who will be assisting with project validation
- To transfer ownership of a project(s) to another Harmony user, click the “Transfer” icon on the left side of the screen



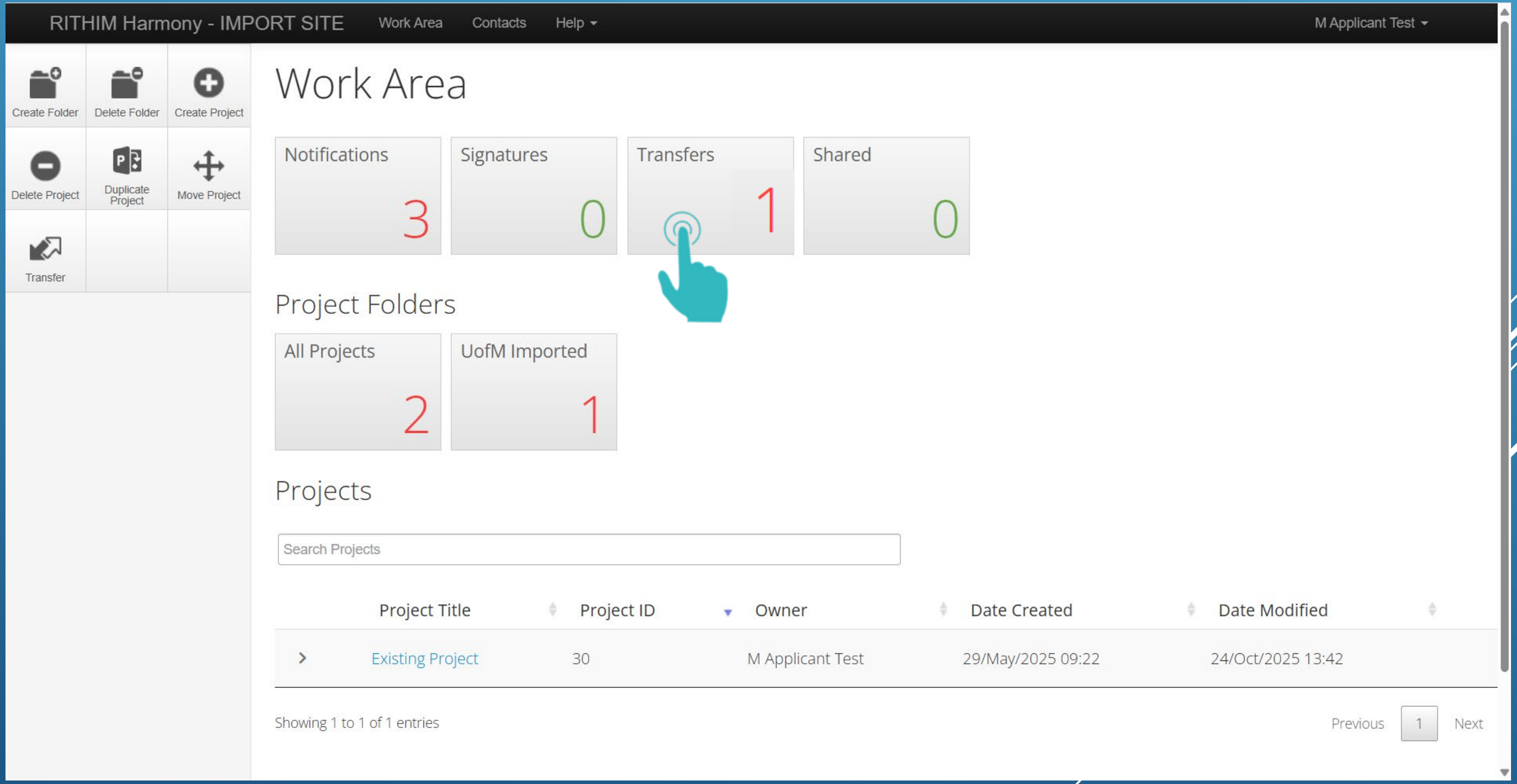
TRANSFERRING IMPORTED PROJECTS

- The Transfer Projects pop-up window will appear
- Enter the email address of the Harmony user you wish to transfer the project(s) to
  - The user should appear as a selectable individual in the system as you type their email address. If not, the email address is not linked to an active account
- Select one or more projects from the available list and click "Transfer"



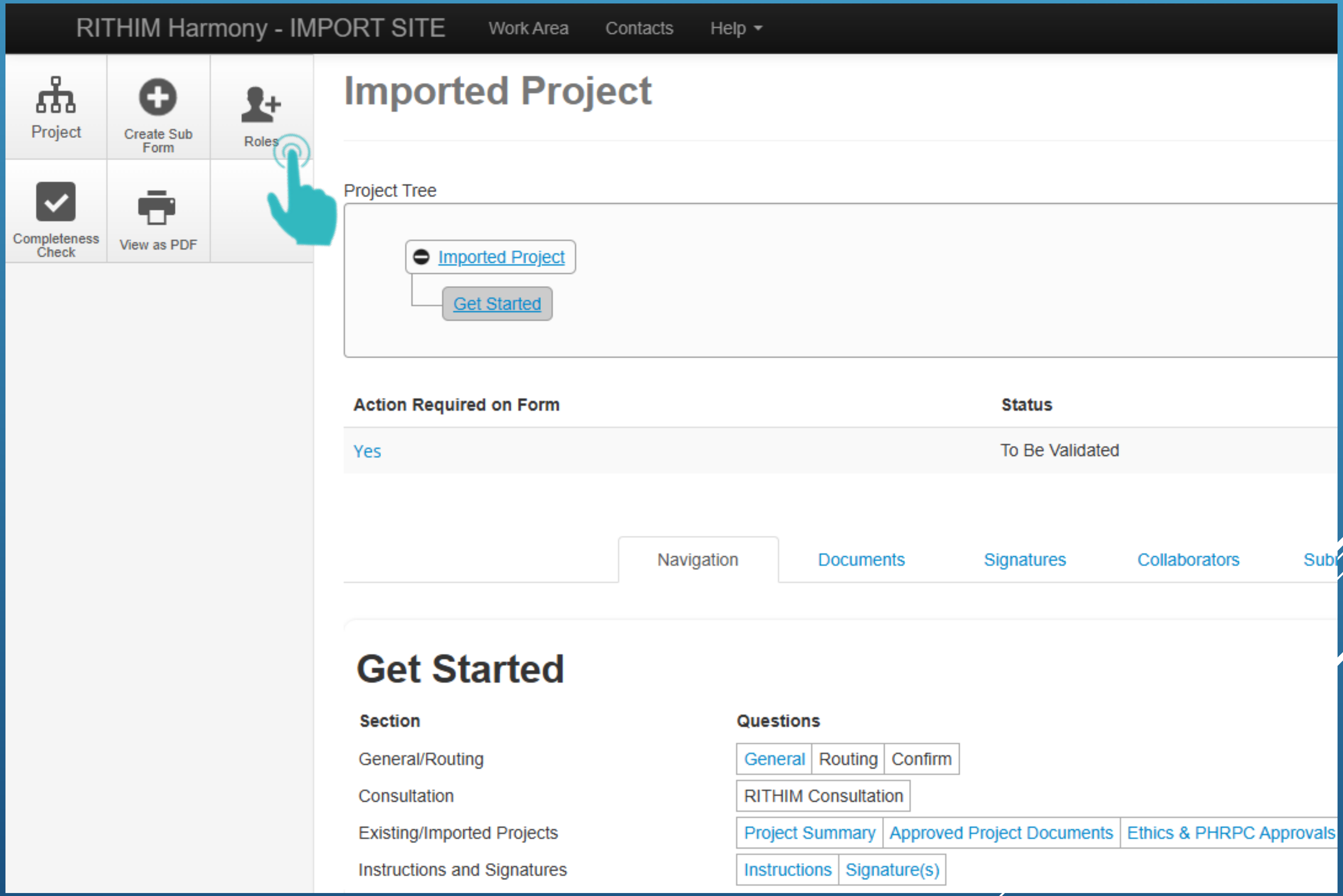
TRANSFERRING IMPORTED PROJECTS

- The user designated for the project transfer will receive a transfer request on the Transfers tile of their work area
- Clicking this tile will display a list of Transfer requests
- The user can click each project and choose to either accept or reject the transfer
- NOTE: Transferring project ownership will immediately cause you to lose access/visibility (while being retained as PI on the project forms). However, the new owner can immediately invite you back as a collaborator using Role Permission function described on the next slide



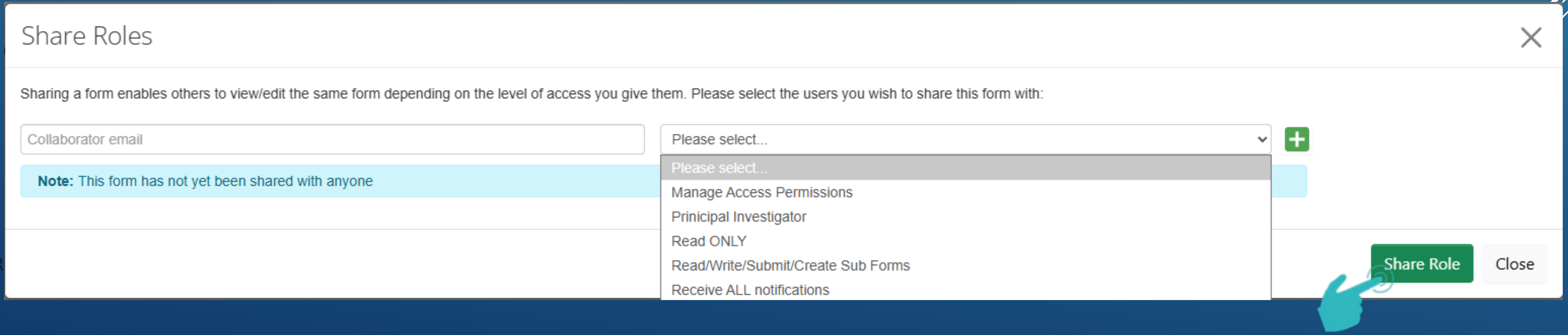
SHARING ROLE PERMISSIONS

- Other Harmony users can collaborate on specific project forms
- To invite a user to collaborate, click on the Project from your project list
- This will open the navigation screen of the Get Started form for your imported study
- You may share Role Permissions by clicking the "Roles" icon on the left side of the screen



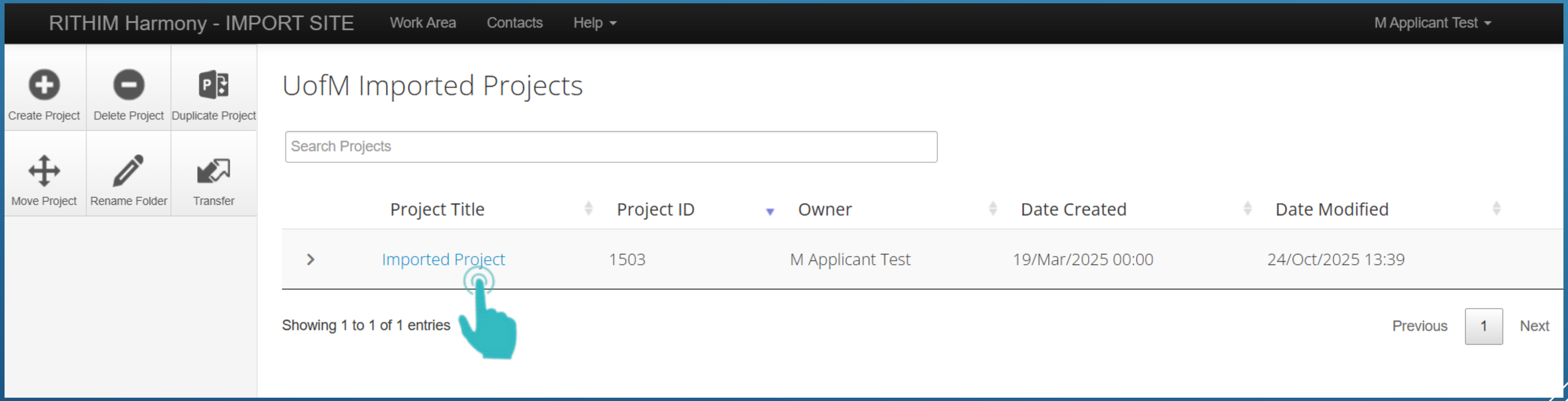
SHARING ROLE PERMISSIONS

- Enter the email address of the Harmony user you wish invite to collaborate
  - The user should appear as a selectable individual in the system as you type their email address. If not, the email address is not linked to an active account
- Choose the type of permission(s) you wish to share
  - To share combinations of permissions with one individual, use the green “+” symbol to add additional rows for each level of permissions (e.g. giving a coordinator access to Read/Write/Submit as well as Receive ALL notifications)
  - The green “+” symbol can also be used to add rows and specify additional users
- Click the “Share Role” button to send the requests



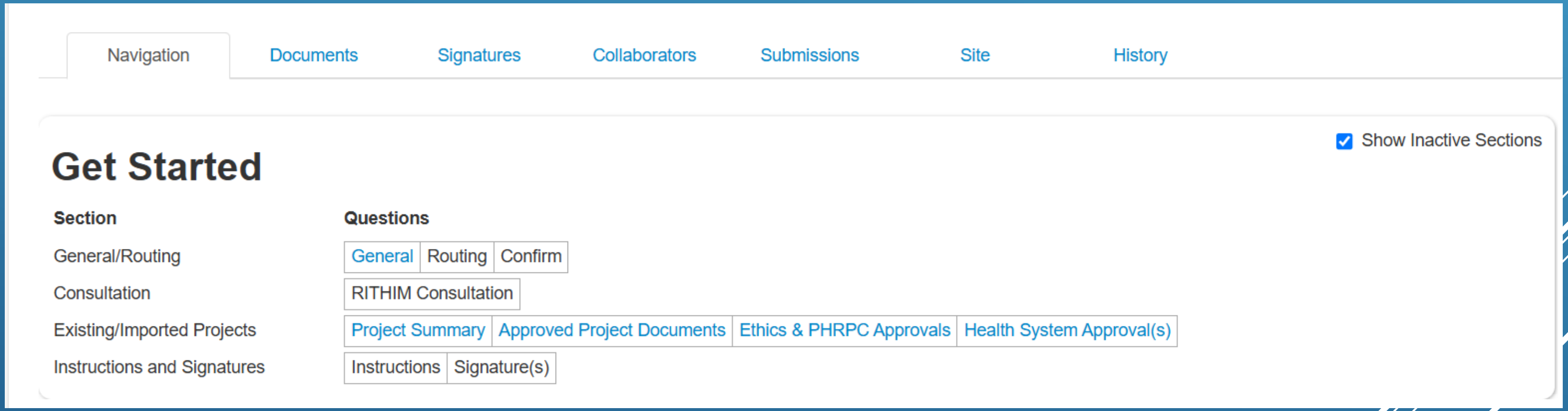
PROJECT VALIDATION

- To begin validating a specific project, click on the title of the project from within the UofM Imported Projects folder



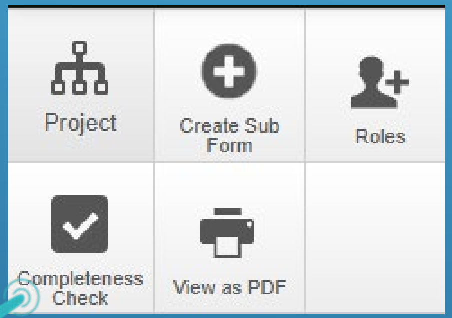
PROJECT VALIDATION

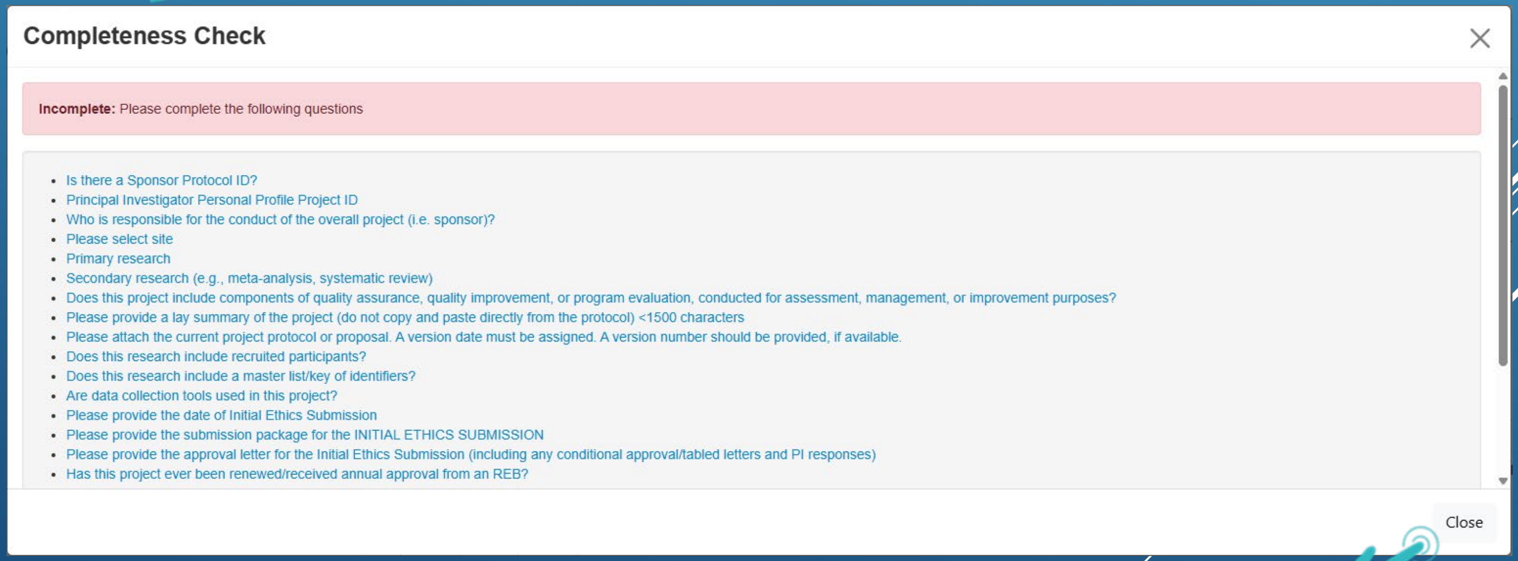
- The Navigation screen for the project will open, focused on the Get Started form where you will see the Table of Contents
- The project data has been imported and populated in the form, but must be manually refreshed to put it in an active state



PROJECT VALIDATION

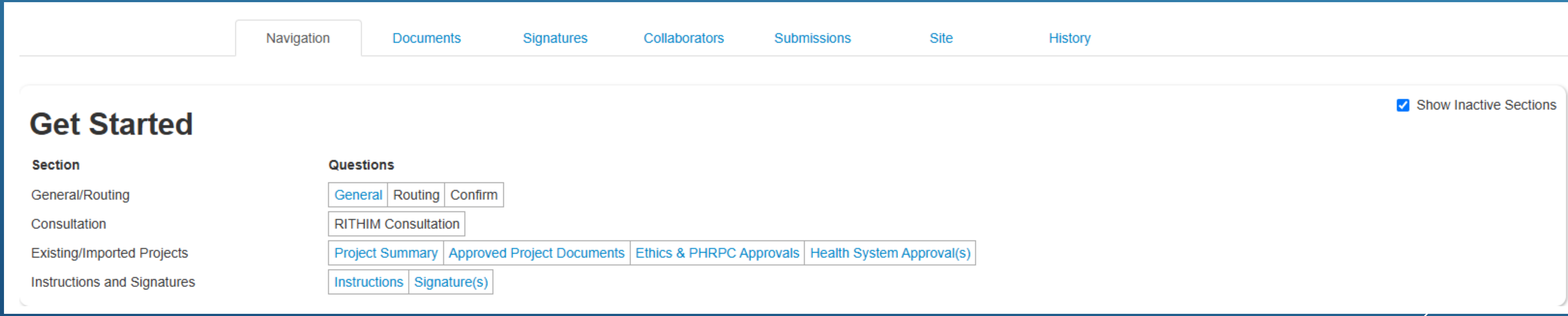
- To do this, click the "Completeness Check" icon on the left side of the screen
- The Completeness Check pop-up window will display showing remaining fields to be addressed
- Clicking the "Close" icon will complete the refresh and place the form in an active state





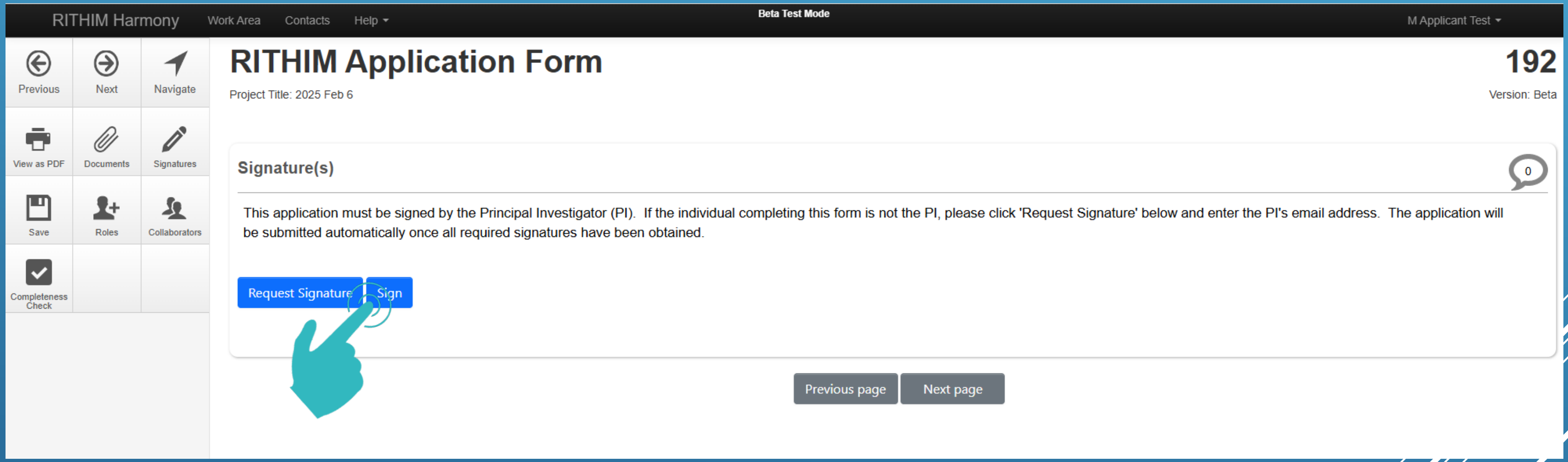
PROJECT VALIDATION

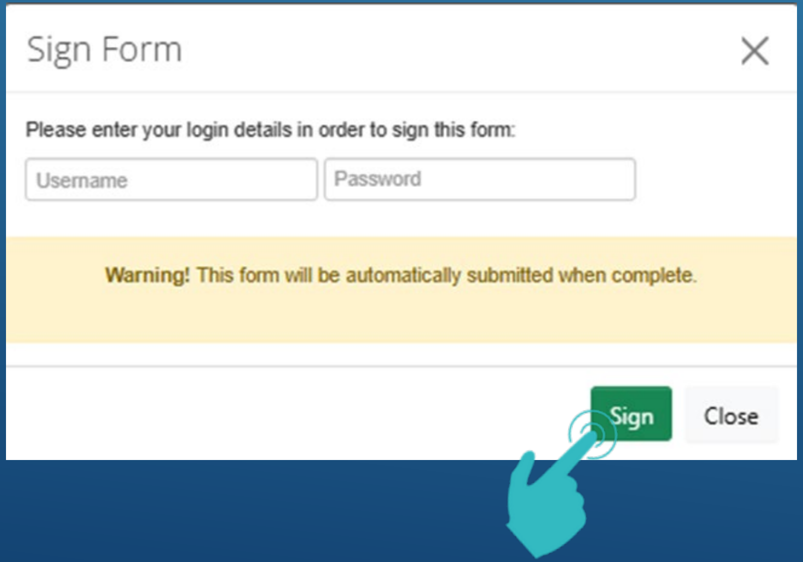
- Returning to the Navigation screen and Table of Contents, we see the Instructions and Signature sections are now blue and active. This confirms the form is ready to validate
- Project validation can be done in any order, but it is recommended to begin with the General section and proceed sequentially



PROJECT VALIDATION

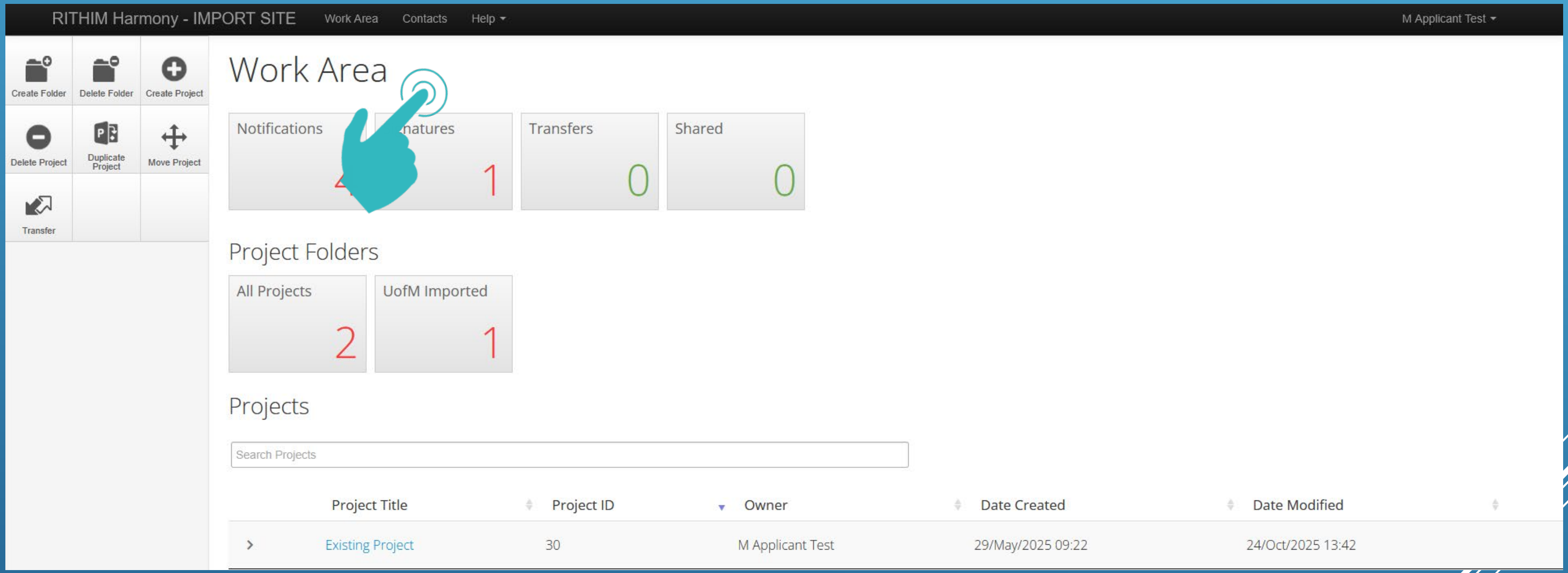
- When the project validation is completed and has passed the completeness check, it must be signed by the PI (or Advisor for Student PIs)
- Entering the Username and Password for the Signatory will validate the form and submit

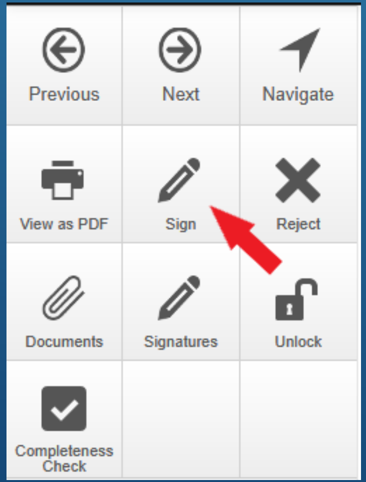




SIGNATURE REQUESTS

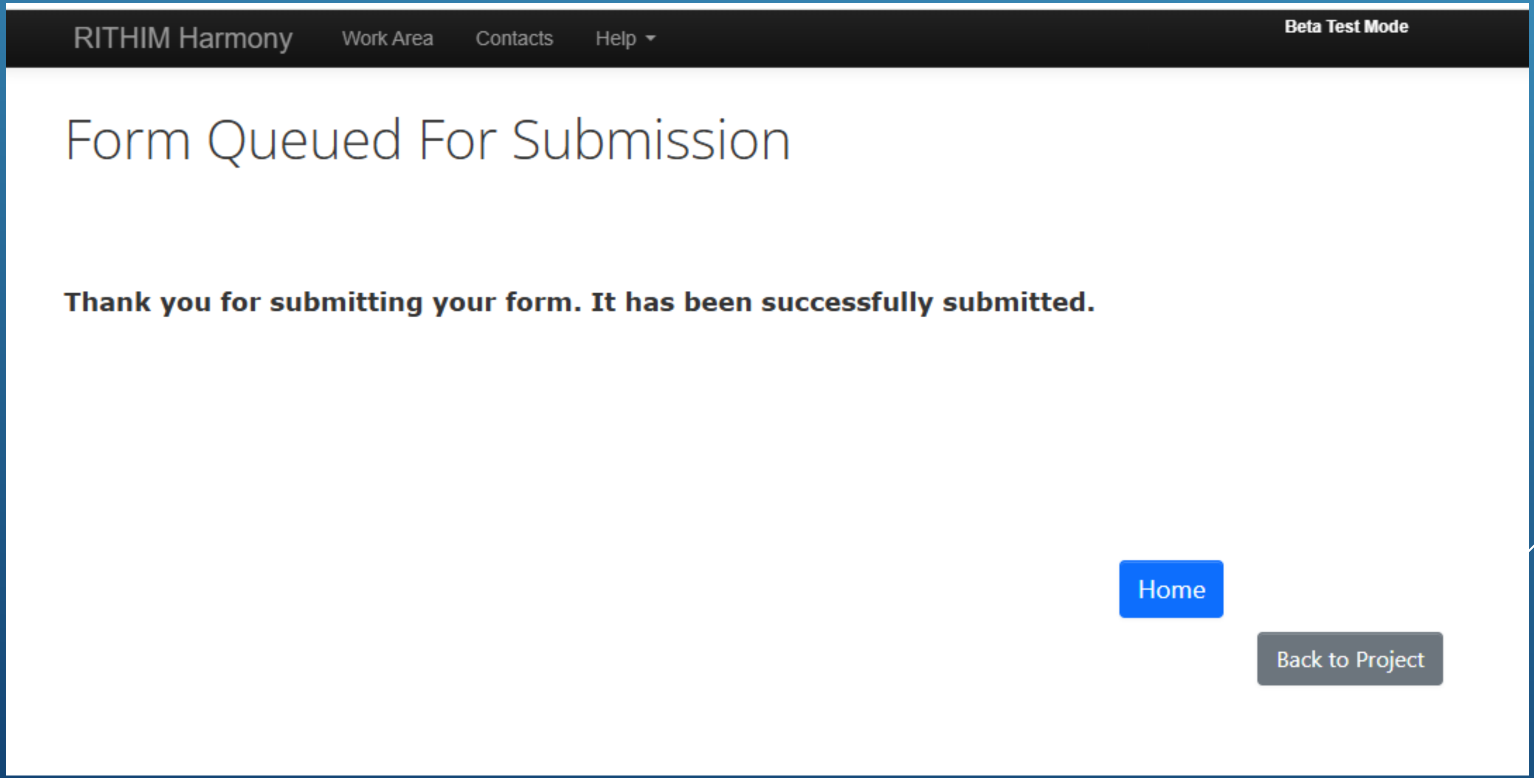
- If the "Request Signature" function is used, the PI will receive a notification on the Signatures tile of their Work Area
- Clicking this will open the signature request list where the PI will click the desired project
- Once the form has been reviewed, the PI will use either the "Sign" or "Reject" action on the left side of the screen to accept and submit the form, or reject and return for further work





COMPLETED VALIDATIONS

- Once Signed, your form is submitted automatically and will receive a status of “Validated” after approximately 10 minutes.
- Once the Project form is in a Validated state, the project is ready for management of any future follow-ons



SUPPORT

For questions or support, please create a support ticket at https://researchmb.freshdesk.com/support/home