

RITHIM HARMONY – IMPORTED PROJECTS GUIDE

Several thin, white, parallel diagonal lines extending from the bottom right towards the top right of the slide.

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



Log in

Email Address*

applicant.rm.test@gmail.com

Password*

.....

Log in

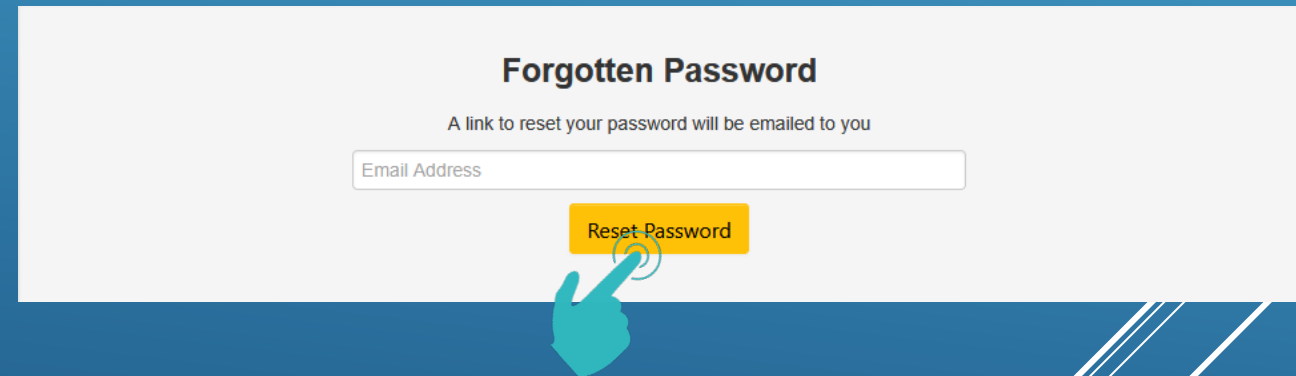
New User

[Forgotten Password](#)

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

RITHIM HARMONY



Forgotten Password

A link to reset your password will be emailed to you

Email Address

Reset Password

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>



Log in

Email Address*

Password*

[Log in](#) [New User](#) [Forgotten Password](#)



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

The screenshot shows the 'Work Area' dashboard of the RITHIM Harmony - IMPORT SITE. The top navigation bar includes 'Work Area', 'Contacts', and 'Help'. The user is logged in as 'M Applicant Test'. The dashboard features a sidebar with icons for 'Create Folder', 'Delete Folder', 'Create Project', 'Delete Project', 'Duplicate Project', 'Move Project', and 'Transfer'. The main content area displays several summary tiles: 'Notifications' (3), 'Signatures' (0), 'Transfers' (0), 'Shared' (0), 'All Projects' (2), and 'UofM Imported' (1). Below these is a 'Projects' section with a search bar and a table of project entries.

Project Title	Project ID	Owner	Date Created	Date Modified
> Existing Project	30	M Applicant Test	29/May/2025 09:22	24/Oct/2025 13:42

Showing 1 to 1 of 1 entries

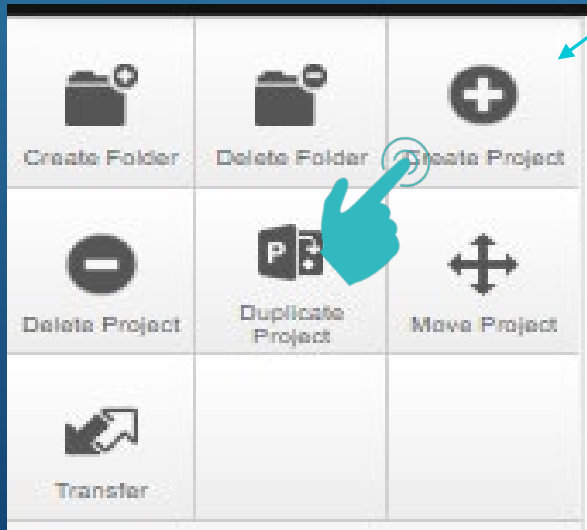
Previous 1 Next

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”



A screenshot of the 'Create Project' dialog box in RITHIM Harmony. The dialog has a title bar with 'Create Project' and a close button. It contains two main sections: 'Project Title* (Max 200 characters)' with a text input field containing 'LASTName, FIRSTName, Initials', and 'Form*' with a dropdown menu. The dropdown menu is open, showing options: 'Please select...', 'Please select...', 'Get Started', and 'Personal Profile Form' (which is highlighted in blue). At the bottom right, there are two buttons: 'Create' (highlighted with a red circle and a red arrow) and 'Close'.

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

RITHIM Harmony

Work Area

Contacts

Help

Beta Test Mode

Project

Roles

Completeness Check

Refresh

View as PDF

LASTName, FIRSTName, Initials

Project Tree

LASTName, FIRSTName, Initials

Personal Profile Form

Action Required on Form

Status

Yes

Not Submitted

Navigation

Documents

Signatures

Collaborators

Subm

Personal Profile Form

Section

Questions

Personal Profile

Details

Certifications

Affiliations

Curriculum Vitae (CV)

Other Training

Signature



- ▶ 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

Personal Profile Details

Short title

Applicant, Test

Please ensure the Personal Profile is titled as "LAST name, FIRST name" of the individual the Personal Profile is created for.

Please complete and submit this form and take note of your Personal Profile Project ID number. Your Personal Profile Project ID number will be required if you are listed as a Research Team member in any RITHIM Application Form.

Projects

Search Projects

Project Title	Project ID	Owner	Date Created	Date Modified
> Applicant, Test	164	M Applicant, Test	2025/01/08 07:59	2025/01/08 07:59

This form will expire 1 year after submission. Please ensure you review, update, and resubmit this form annually.

Search User

First Name

Surname

Email

If the person completing this form is not the subject of the form, you must assign Read/Write/Submit/Create Sub Form permissions (at minimum) to that individual, using the Roles action on the left-hand side.

Assign Role

Previous page Next page

- ▶ 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, enter the first one and then select “Add Another” to enter more

Personal Profile Form

Project Title: Applicant, Test

164
Version: 1.01

Affiliations

Are you currently a Principal Investigator (including Student PI), Sub-Investigator, Co-Investigator, or Supervisor/Advisor on a research project? ☒ Yes ☐ No

Please Note: if you respond "No" to this question and later become an investigator or supervisor on a project, you will be required to update this Personal Profile Form and complete your CV in order for your application to be reviewed.

Post-Secondary Affiliations

Please identify all your post-secondary institution/department affiliations (this includes all employment relationships and student statuses)

[View As Table](#)

Institution	Please Select...
Role	Please Select...

Please click "Add Another" for each additional post-secondary affiliation

[Add Another](#)

- ▶ 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”

Personal Profile Form

Project Title: LASTName, FIRSTName, Initials

164
Version: 1.01

Signature

This application must be signed by the individual named on this form. If the individual completing this form is different from the person named, please click 'Request Signature' below and enter the individual's email address. The application will be submitted automatically once all required signatures have been obtained.

[Request Signature](#) [Sign](#)



Completeness Check

Incomplete: Please complete the following questions

- [Short title](#)
- [Profile Owner First Name](#)
- [Profile Owner Surname](#)

Sign Form

Please enter your login details in order to sign this form:

Username Password

Warning! This form will be automatically submitted when complete.

[Sign](#) [Close](#)



- 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

RITHIM Harmony - IMPORT SITE Work Area Contacts Help ▾ M Applicant Test ▾

Create Folder

Delete Folder

Create Project

Delete Project

Duplicate Project

Move Project

Transfer

Work Area

Notifications
6

Signatures
1

Transfers
0

Shared
0

Project Folders

All Projects
2

UofM Imported
1

Projects

Search Projects

Project Title	Project ID	Owner	Date Created	Date Modified
> LASTName, FIRSTName, Initials	164	M Applicant Test	29/May/2025 09:22	27/Oct/2025 15:37

RITHIM HARMONY

13

11/3/2025

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

RITHIM Harmony - IMPORT SITE Work Area Contacts Help M Applicant Test

Create Folder Delete Folder Create Project

Delete Project Duplicate Project Move Project

Transfer

Work Area

Notifications 3 Signatures 0 Transfers 0 Shared 0

Project Folders

All Projects 2 UofM Imported 1

Projects

Search Projects

Project Title	Project ID	Owner	Date Created	Date Modified
> Existing Project	30	M Applicant Test	29/May/2025 09:22	24/Oct/2025 13:42

Showing 1 to 1 of 1 entries

Previous 1 Next

IMPORTED PROJECTS LIST

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

Create Project

Delete Project

Duplicate Project

Move Project

Rename Folder

Transfer

RITHIM Harmony - IMPORT SITE

Work Area

Contacts

Help

M Applicant Test

UofM Imported Projects

Search Projects

Project Title	Project ID	Owner	Date Created	Date Modified
> Imported Project	1503	M Applicant Test	19/Mar/2025 00:00	24/Oct/2025 13:39

Showing 1 to 1 of 1 entries

Previous

1

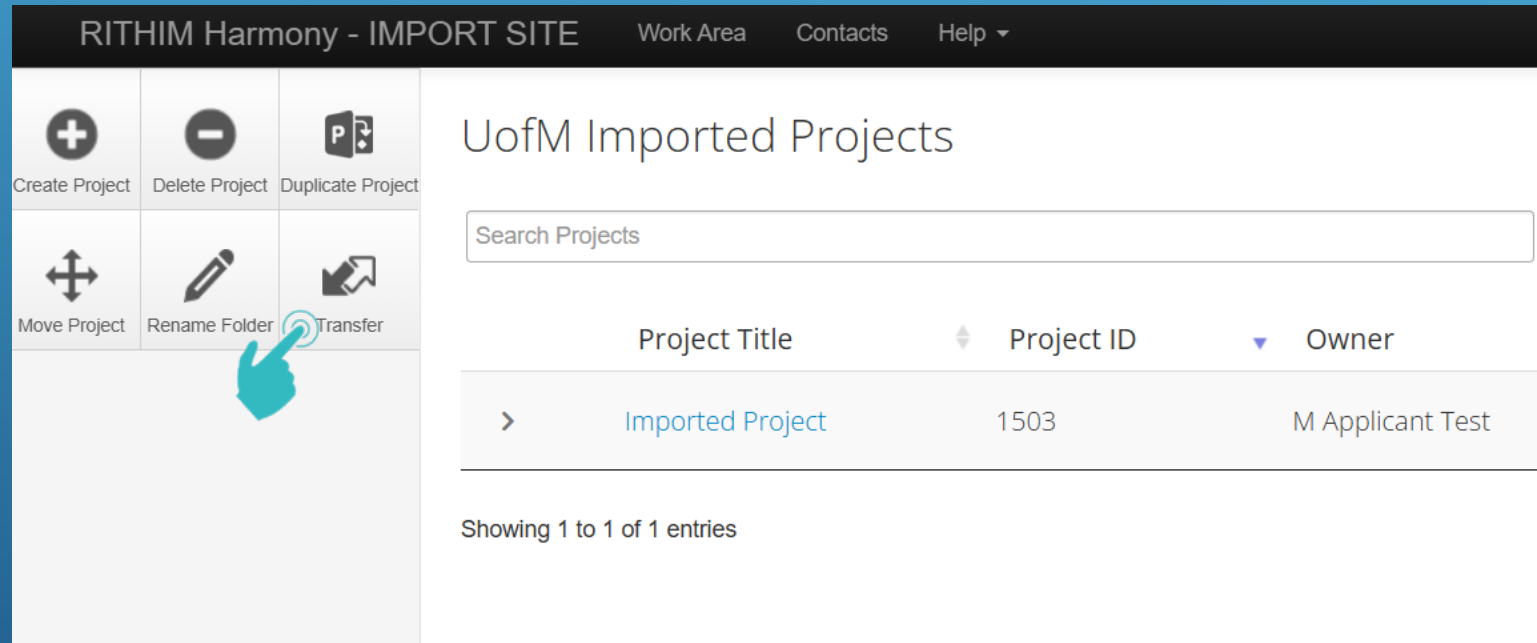
Next

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



The screenshot displays the 'RITHIM Harmony - IMPORT SITE' interface. The top navigation bar includes 'Work Area', 'Contacts', and 'Help'. On the left, a sidebar contains icons for 'Create Project' (plus), 'Delete Project' (minus), 'Duplicate Project' (P with arrows), 'Move Project' (four arrows), 'Rename Folder' (pencil), and 'Transfer' (hand with arrow). A red hand cursor points to the 'Transfer' icon. The main content area is titled 'UofM Imported Projects' and features a 'Search Projects' input field. Below this is a table with columns for 'Project Title', 'Project ID', and 'Owner'. The table contains one entry: 'Imported Project' with ID '1503' and owner 'M Applicant Test'. At the bottom, it states 'Showing 1 to 1 of 1 entries'.

Project Title	Project ID	Owner
> Imported Project	1503	M Applicant Test

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”

The screenshot shows the RITHIM Harmony - IMPORT SITE interface. The background is a dimmed view of the main workspace with a toolbar containing icons for Create Project, Delete Project, Duplicate Project, Move Project, Rename Folder, and Transfer. The main content area shows a search bar and a list of projects under the heading 'UofM Imported P'. A 'Transfer Projects' pop-up window is overlaid on the right. The pop-up has a close button (X) in the top right corner. Inside the pop-up, there is a light blue warning box that says 'Please note that you will lose all access to this project.' Below this, there is a section for 'Email Address:' with a text input field. Underneath is a 'Message:' section with a text area labeled 'Enter a message (optional)'. Below the message area is another 'Search Projects' input field. A table with two columns, 'Id' and 'Project Title', is displayed. The table has one row with a checked checkbox, '1503', and 'Imported Project'. At the bottom right of the pop-up, there are two buttons: 'Transfer' (green) and 'Close' (grey). A hand icon is pointing at the 'Transfer' button.

RITHIM Harmony - IMPORT SITE

Work Area Contacts Help

Create Project Delete Project Duplicate Project

Move Project Rename Folder Transfer

UofM Imported P

Search Projects

Project Title

> Imported Project

Showing 1 to 1 of 1 entries

Transfer Projects

Please note that you will lose all access to this project.

Email Address:

Email Address

Message:

Enter a message (optional)

Search Projects

	Id	Project Title
☒	1503	Imported Project

Transfer Close

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

RITHIM Harmony - IMPORT SITE Work Area Contacts Help M Applicant Test

Work Area

Notifications 3 Signatures 0 Transfers 1 Shared 0

Project Folders

All Projects 2 UofM Imported 1

Projects

Search Projects

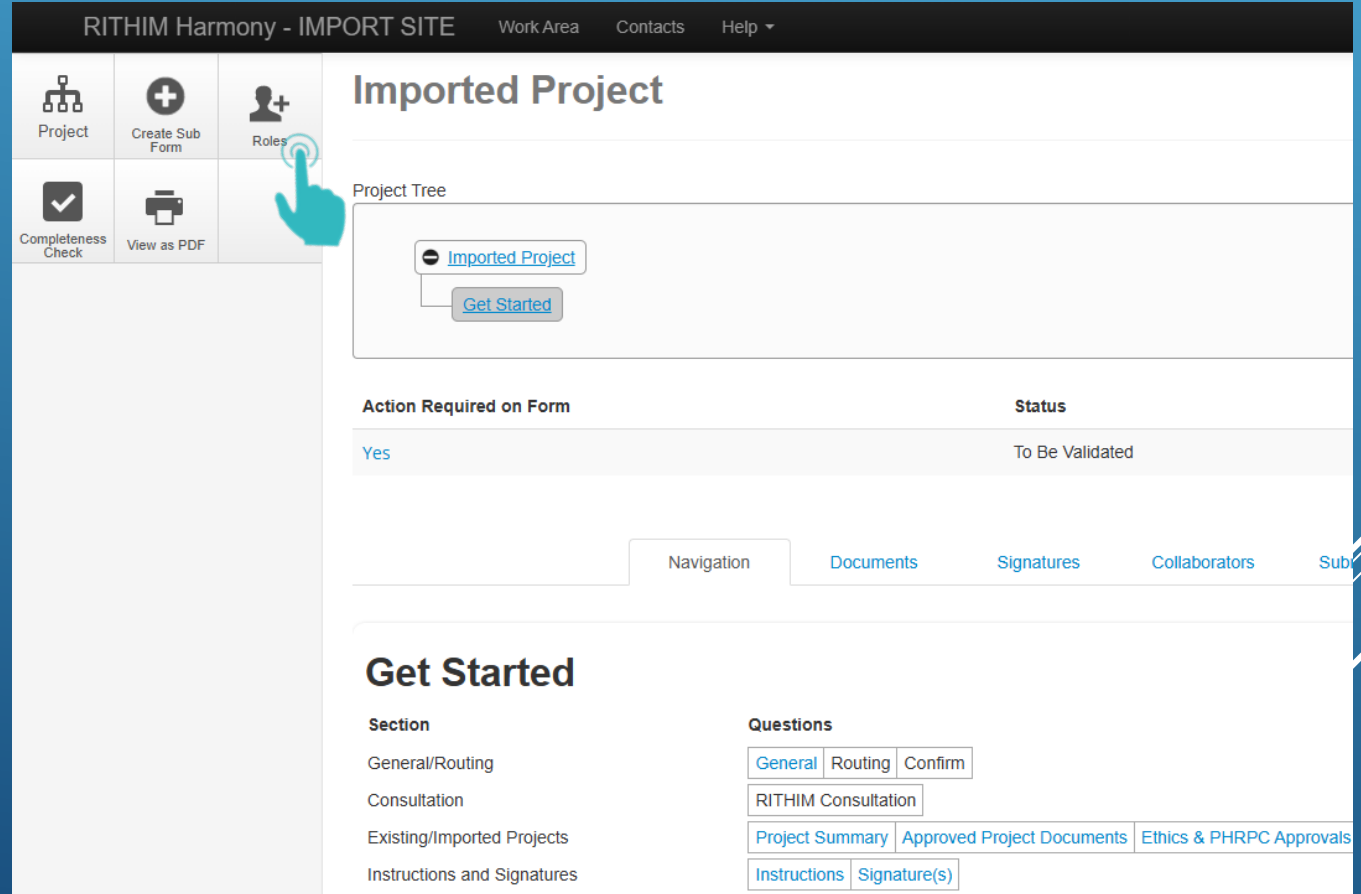
Project Title	Project ID	Owner	Date Created	Date Modified
> Existing Project	30	M Applicant Test	29/May/2025 09:22	24/Oct/2025 13:42

Showing 1 to 1 of 1 entries

Previous 1 Next

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



RITHIM Harmony - IMPORT SITE Work Area Contacts Help ▾

Imported Project

Project Tree

- Imported Project
 - Get Started

Action Required on Form	Status
Yes	To Be Validated

Navigation Documents Signatures Collaborators Sub

Get Started

Section	Questions
General/Routing	General Routing Confirm
Consultation	RITHIM Consultation
Existing/Imported Projects	Project Summary Approved Project Documents Ethics & PHRPC Approvals
Instructions and Signatures	Instructions Signature(s)

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

Share Roles

Sharing a form enables others to view/edit the same form depending on the level of access you give them. Please select the users you wish to share this form with:

Collaborator email

Note: This form has not yet been shared with anyone

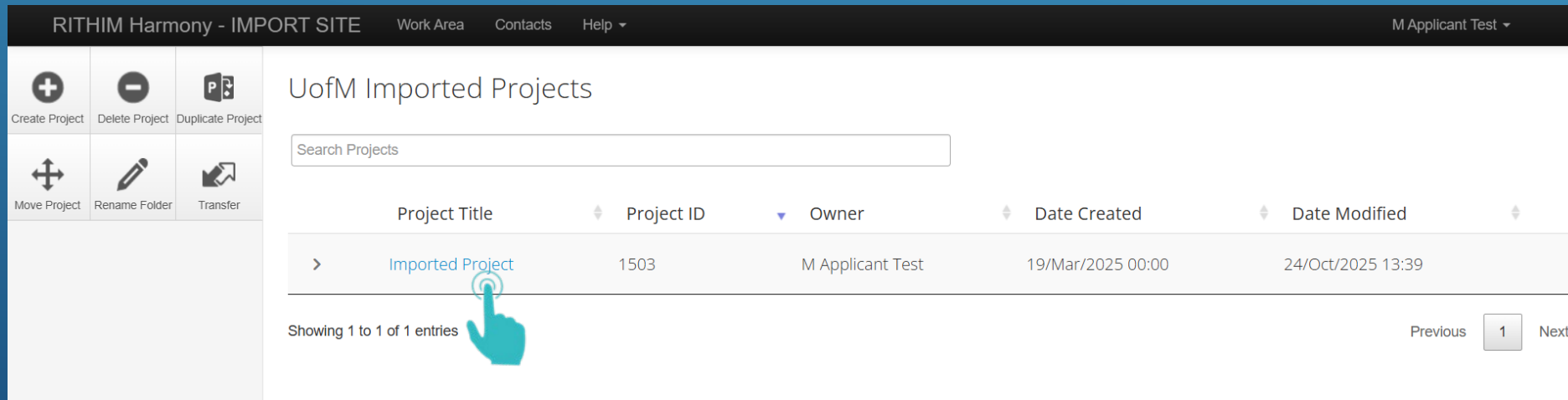
Please select...

- Please select...
- Manage Access Permissions
- Principal Investigator
- Read ONLY
- Read/Write/Submit/Create Sub Forms
- Receive ALL notifications

Share Role Close

PROJECT VALIDATION

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



The screenshot displays the RITHIM Harmony - IMPORT SITE interface. The top navigation bar includes 'Work Area', 'Contacts', and 'Help'. The main content area is titled 'UofM Imported Projects' and features a search bar. Below the search bar is a table with the following columns: Project Title, Project ID, Owner, Date Created, and Date Modified. A single entry is listed with the title 'Imported Project', ID '1503', Owner 'M Applicant Test', Date Created '19/Mar/2025 00:00', and Date Modified '24/Oct/2025 13:39'. A hand cursor is pointing at the 'Imported Project' title. The bottom of the interface shows 'Showing 1 to 1 of 1 entries' and pagination controls with 'Previous', '1', and 'Next' buttons.

Project Title	Project ID	Owner	Date Created	Date Modified
> Imported Project	1503	M Applicant Test	19/Mar/2025 00:00	24/Oct/2025 13:39

PROJECT VALIDATION

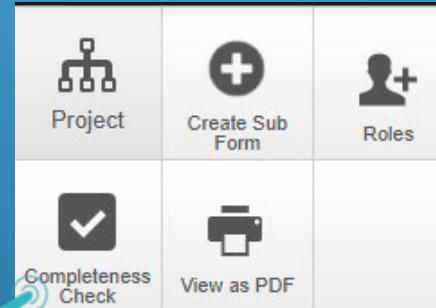
- ▶ The Navigation screen for the project will open, focused on the Get Started form where you will see the Table of Contents
- ▶ The project data has been imported and populated in the form, but must be manually refreshed to put it in an active state

The screenshot displays the 'Get Started' form within a web application. At the top, a navigation bar includes tabs for 'Navigation', 'Documents', 'Signatures', 'Collaborators', 'Submissions', 'Site', and 'History'. The 'Navigation' tab is currently selected. Below the navigation bar, the 'Get Started' section is titled, and a checkbox labeled 'Show Inactive Sections' is checked. The form is organized into two main columns: 'Section' and 'Questions'. The 'Section' column lists four categories: 'General/Routing', 'Consultation', 'Existing/Imported Projects', and 'Instructions and Signatures'. The 'Questions' column displays a series of buttons corresponding to these sections. For 'General/Routing', the buttons are 'General', 'Routing', and 'Confirm'. For 'Consultation', the button is 'RITHIM Consultation'. For 'Existing/Imported Projects', the buttons are 'Project Summary', 'Approved Project Documents', 'Ethics & PHRPC Approvals', and 'Health System Approval(s)'. For 'Instructions and Signatures', the buttons are 'Instructions' and 'Signature(s)'. The buttons are arranged in a grid-like fashion, with some buttons spanning multiple rows.

Section	Questions
General/Routing	General Routing Confirm
Consultation	RITHIM Consultation
Existing/Imported Projects	Project Summary Approved Project Documents Ethics & PHRPC Approvals Health System Approval(s)
Instructions and Signatures	Instructions Signature(s)

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



Completeness Check [X]

Incomplete: Please complete the following questions

- Is there a Sponsor Protocol ID?
- Principal Investigator Personal Profile Project ID
- Who is responsible for the conduct of the overall project (i.e. sponsor)?
- Please select site
- Primary research
- Secondary research (e.g., meta-analysis, systematic review)
- Does this project include components of quality assurance, quality improvement, or program evaluation, conducted for assessment, management, or improvement purposes?
- Please provide a lay summary of the project (do not copy and paste directly from the protocol) <1500 characters
- Please attach the current project protocol or proposal. A version date must be assigned. A version number should be provided, if available.
- Does this research include recruited participants?
- Does this research include a master list/key of identifiers?
- Are data collection tools used in this project?
- Please provide the date of Initial Ethics Submission
- Please provide the submission package for the INITIAL ETHICS SUBMISSION
- Please provide the approval letter for the Initial Ethics Submission (including any conditional approval/abled letters and PI responses)
- Has this project ever been renewed/received annual approval from an REB?

Close

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

The screenshot displays the 'Get Started' section of a project validation interface. At the top, there is a navigation bar with tabs: 'Navigation' (active), 'Documents', 'Signatures', 'Collaborators', 'Submissions', 'Site', and 'History'. Below the navigation bar, the 'Get Started' section is titled, with a checkbox 'Show Inactive Sections' checked. A table lists sections and their corresponding questions.

Section	Questions
General/Routing	General Routing Confirm
Consultation	RITHIM Consultation
Existing/Imported Projects	Project Summary Approved Project Documents Ethics & PHRPC Approvals Health System Approval(s)
Instructions and Signatures	Instructions Signature(s)

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

RITHIM Harmony Work Area Contacts Help

Beta Test Mode M Applicant Test

192 Version: Beta

Previous Next Navigate

View as PDF Documents Signatures

Save Roles Collaborators

Completeness Check

RITHIM Application Form

Project Title: 2025 Feb 6

Signature(s)

This application must be signed by the Principal Investigator (PI). If the individual completing this form is not the PI, please click 'Request Signature' below and enter the PI's email address. The application will be submitted automatically once all required signatures have been obtained.

Request Signature Sign

Previous page Next page

Sign Form

Please enter your login details in order to sign this form:

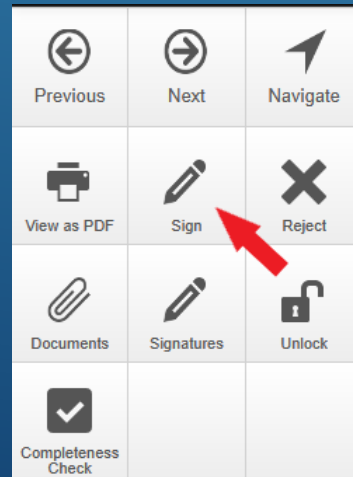
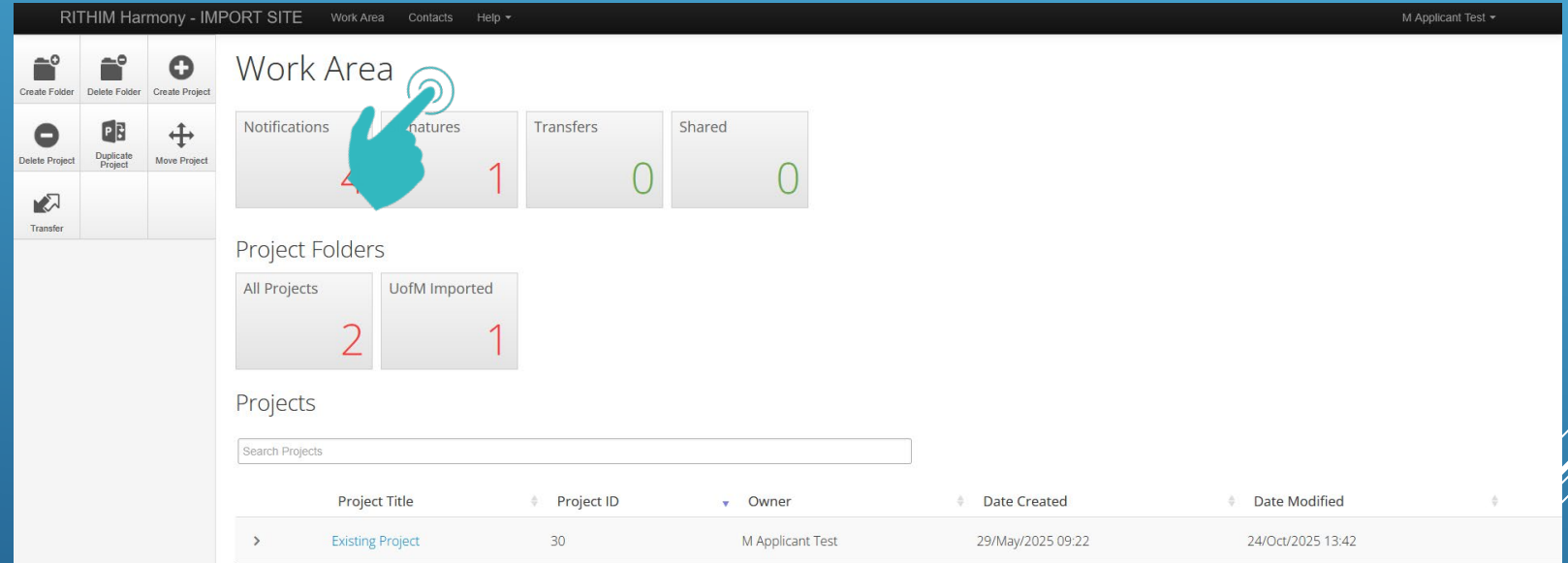
Username Password

Warning! This form will be automatically submitted when complete.

Sign Close

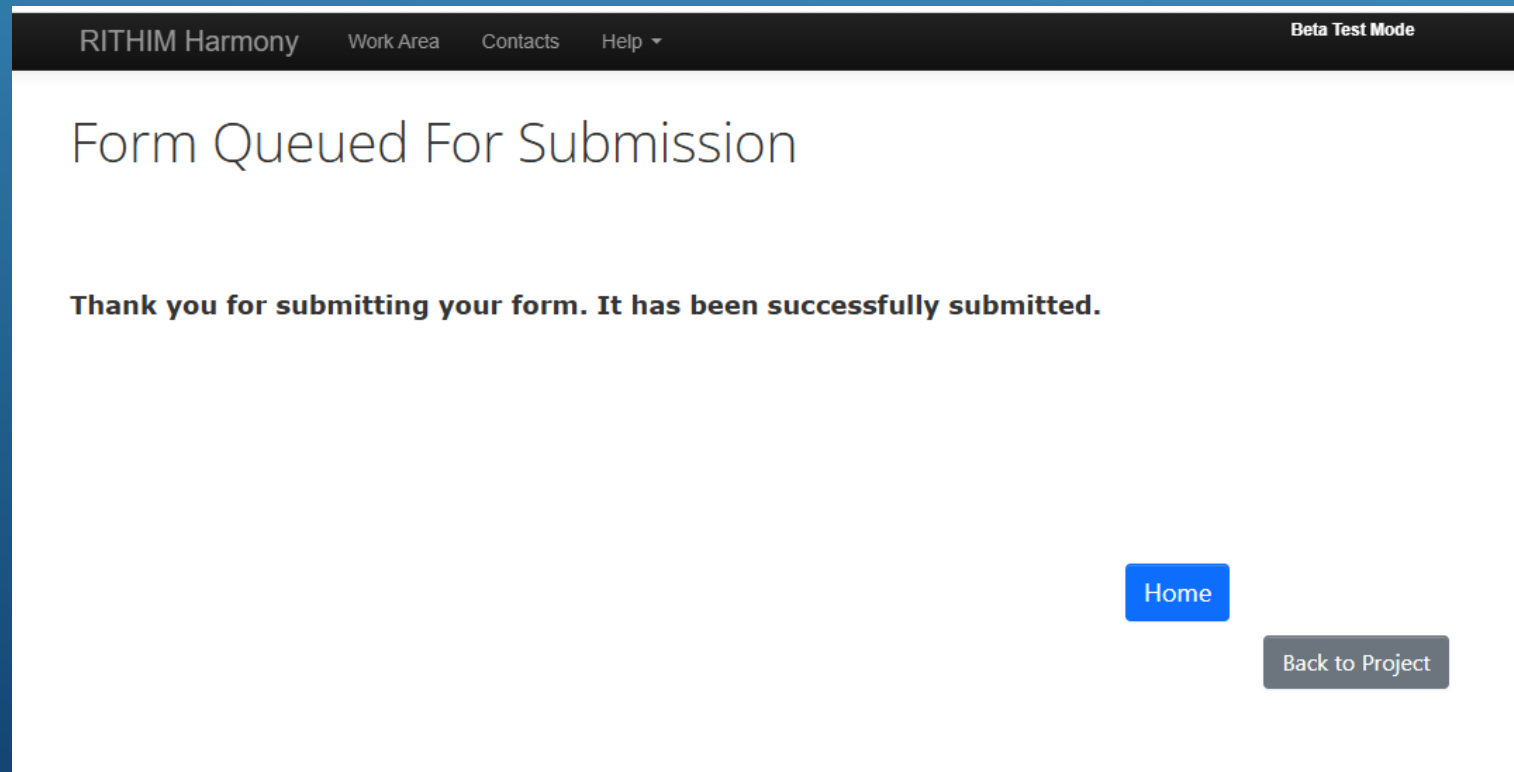
SIGNATURE REQUESTS

- ▶ 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>