Echelon: PI Tutorials

Echelon: Planning for Innovation (PI) helps researchers and principal investigators at the University of Oregon (UO) communicate intellectual property rights obligations and other important sponsor expectations to those working on research project teams and facilitates the collection of final project work in one location.

These tutorials help guide users through the creation of a login, if they are not part of the UO; logging in; adding members and assets to a project; approving assets; and signing a project rules agreement (PRAs).

Echelon: PI was developed and is managed by the University of Oregon Innovation Partnership Services.

Table of Contents

Definition of User Roles

There are four types of user roles within the Echelon: PI platform. These tutorials will cover the functionality associated with Supervisor, Manager, and Member user accounts.

Administrators: These users set up projects and create project rules agreements. These users are Innovation Partnership Services or other designated UO employees. Administrator users can create projects, create project rules agreements, add members to a project, add assets to a project, and add obligations to a project.

Supervisor: These users make programmatic and fiduciary decisions for a project. These users are typically principal investigators or project leads. Supervisor users can add members to a project, add assets to a project, approve assets that have been added to a project, and sign project rules agreements.

Manager: These users assist the Project Supervisor in managing the project. These users are typically research associates, office specialists, or departmental grant administrators. Manager users can add members to a project, add assets to a project, approve assets that have been added to a project, and sign project rules agreements.

Member: These users make up the project team and complete project work. These users are typically faculty, post-docs, graduate employees, or undergraduate employees. Certain projects may also have student volunteers, students in a course (e.g., capstone or studio), or outside volunteers. Member users can add assets to a project and sign project rules agreements.

New User Account Creation: Non-UO Users

An Administrator creates a project and begins the process of adding users. UO Users use their already existing Duck ID to login to the system. An Administrator, Project Manager, or Project Supervisor can create an Echelon: PI account for non-UO users. See Adding Members to a Project on page 10 for details on how to initiate the account creation by adding a member to a project.

Non-UO users who have received an email invitation to create an account will complete the following steps within 48 hours:
1. Open the email with the invitation and click on the invitation link.
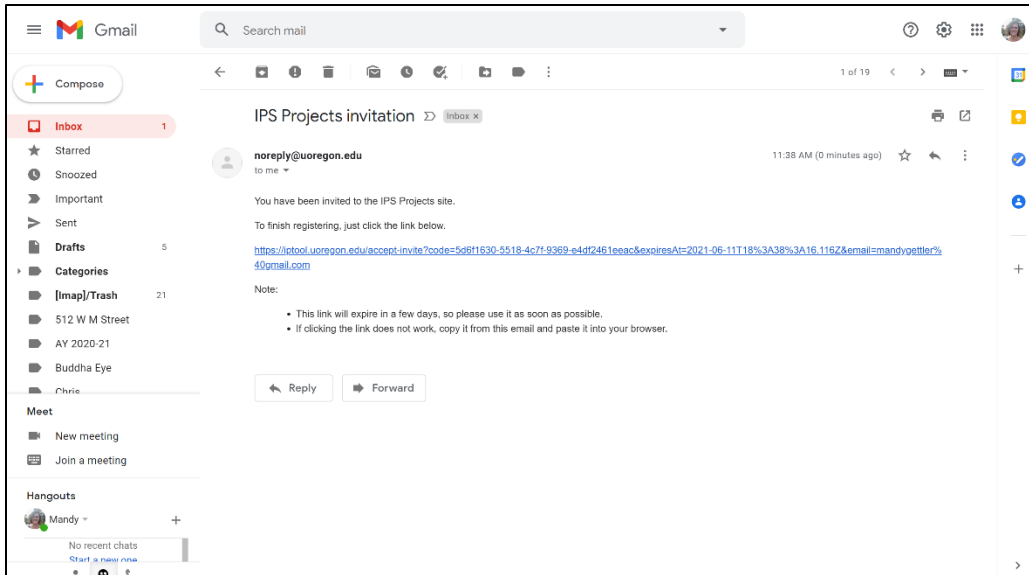
2. The link will take you to the Echelon: PI website. Create a password for yourself. We recommend creating a password that uses a combination of letters, numbers, and special characters.

3. Then, click the green "Submit" button.

Accept Invite

Email

mandygettler@gmail.com

Password

••••••••

**Password (confirm)**

••••••••

Submit

4. You have now successfully created your Echelon: PI account and are ready to use the platform. Click the green "Login" button to begin.
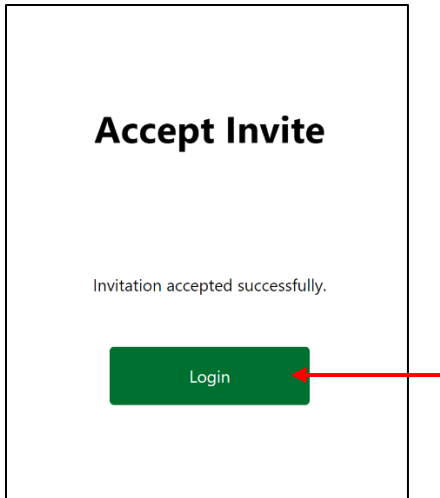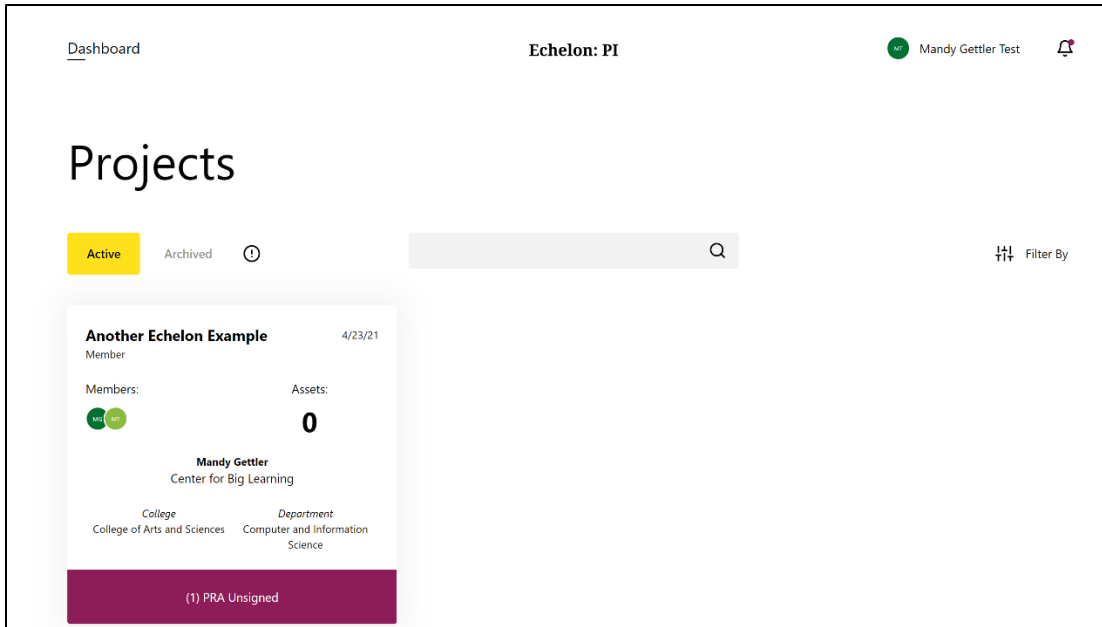
Logging In: Non-UO Users

Those who are external to the university may be granted access to a project by an Administrator, Project Manager, or Project Supervisor to view specific projects.

1. Open echelon.uoregon.edu in a web browser. We recommend Chrome or Safari, but any modern browser will do.
2. Enter the email associated with your account and the password.
3. Click the green "Login" button.
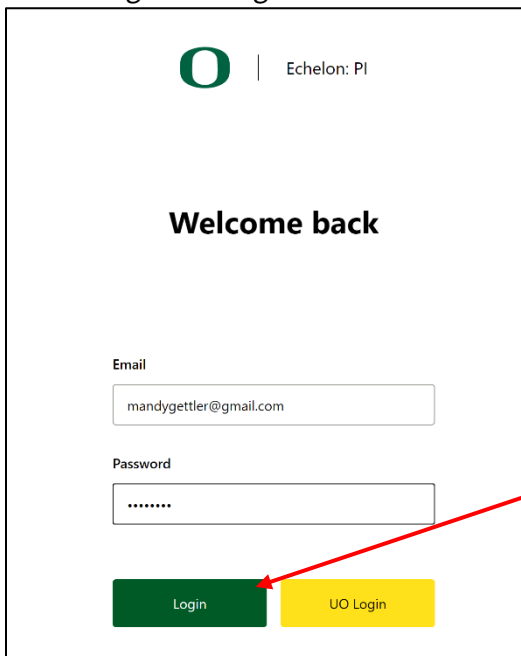
4. You are now in the Echelon: PI dashboard where you can view your current projects, add assets to a project, and sign project rules agreements.
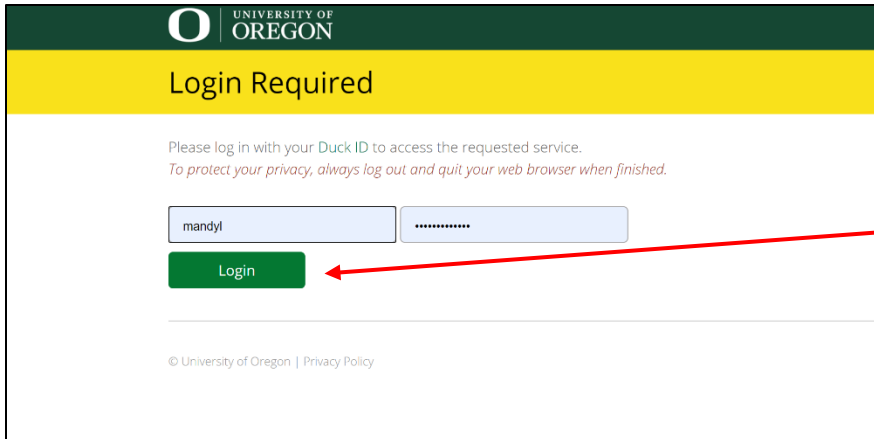
Logging In: UO Users

Those who have an @uoregon.edu email address are granted access to view specific projects by an Administrator, Project Manager, or Project Supervisor. To login:

1. Open echelon.uoregon.edu in a web browser. We recommend Chrome or Safari, but any modern browser will do.
2. Click the yellow "UO Login" button.

3. Enter your Duck ID. Then click "Login."

4. You may be prompted to authenticate your login.
5. You are now in the Echelon: PI dashboard where you can view your current projects, add assets to a project, and sign project rules agreements.
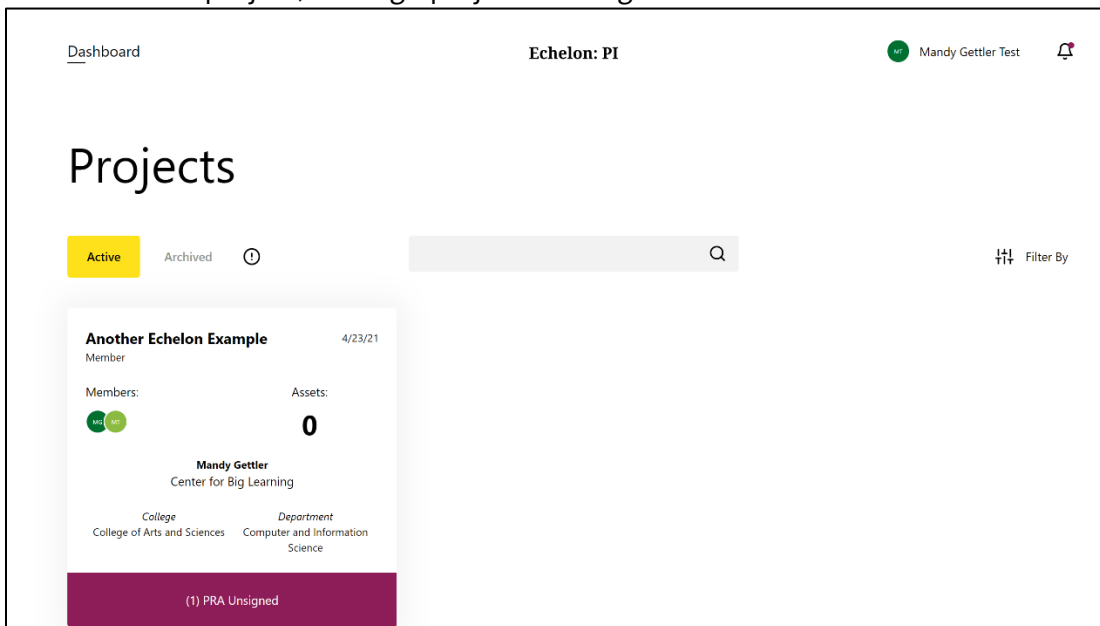
Forgot Password: Non-UO Users
Non-UO users may reset their password using the Echelon: PI platform. To do so:
1. Open echelon.uoregon.edu in a web browser. We recommend Chrome or Safari, but any modern browser will do.
2. Click the "Forgot Password?" link at the bottom of the screen.

3. Enter the email address associated with your account and click the green "Submit" button.

5. You will receive an email to the account you provided. Open the email with the invitation to reset your password and click on the password reset link.
6. You will arrive at the Echelon: PI website. Create a new password for yourself. We recommend creating a password that uses a combination of letters, numbers, and special characters. Click the green "Submit" button.

7. You have now successfully reset your Echelon: PI account and are ready to use the platform. Click the green "Login" button to begin.


Forgot Password: UO Users

UO users login to Echelon: PI using their Duck ID. If you have forgotten your Duck ID, visit duckid.uoregon.edu and click the "Forgotten Password" link to recover your Duck ID. Follow the prompts as directed.

Changing Your Password: Non-UO Users

To maintain the security of your project, we recommend updating your password at least once every twelve months. To do so:

1. Click your name in the top right of the screen.
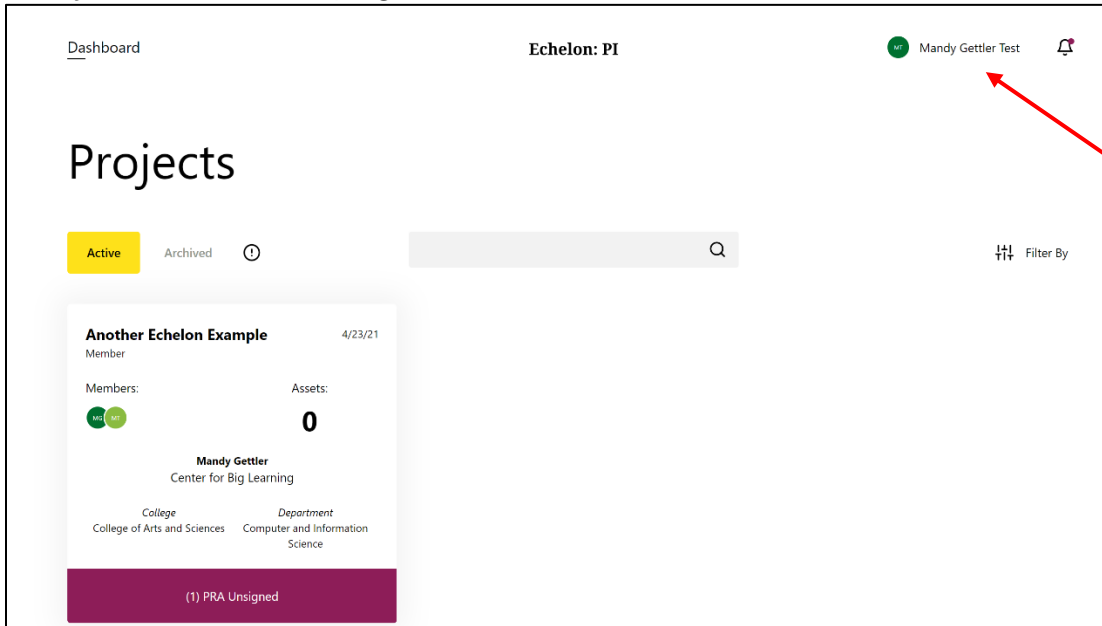
2. Enter a new password in the "Password" box. We recommend creating a password that uses a combination of letters, numbers, and special characters.
3. Re-enter the new password in the "Password (Confirmed)" box.
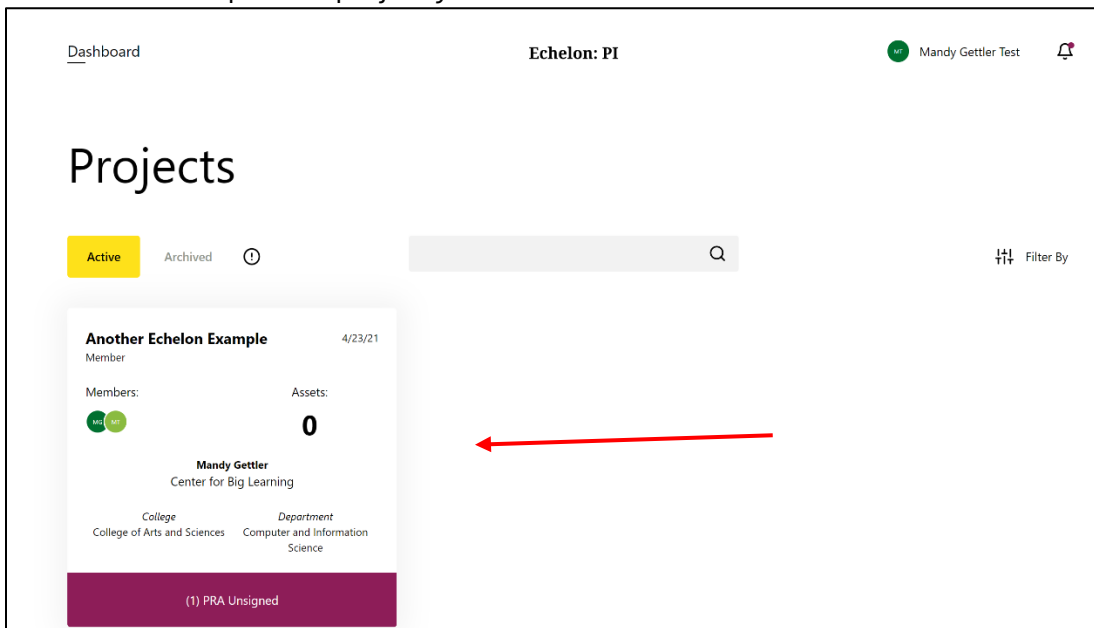4. Click the green "Save" button.

Changing Your Password: UO Users

UO users should follow the procedure for updating their Duck ID password as set forth by central IT.

Adding Members to a Project: Managers and Supervisors Only

Echelon: PI Administrators, Project Managers, and Project Supervisors may add members to a project. To do so:

1. Follow the procedures above to login.
2. After logging in, you will arrive at your dashboard. Here, you will see all your active projects.
3. Click the tile to open the project you want to add members to.
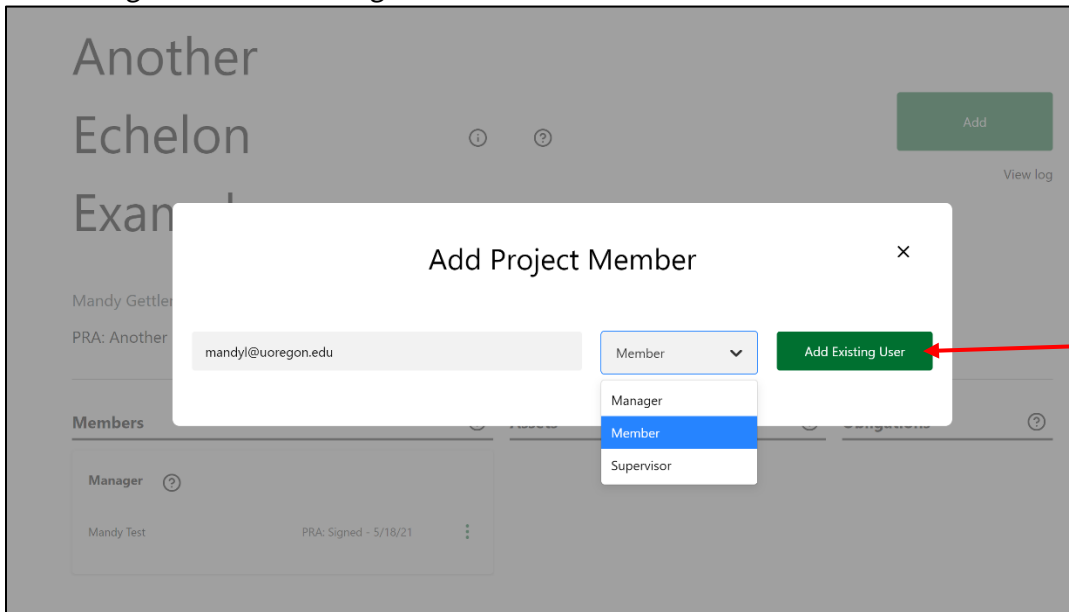

4. Click the green "Add" button on the right and then select "Add Member."
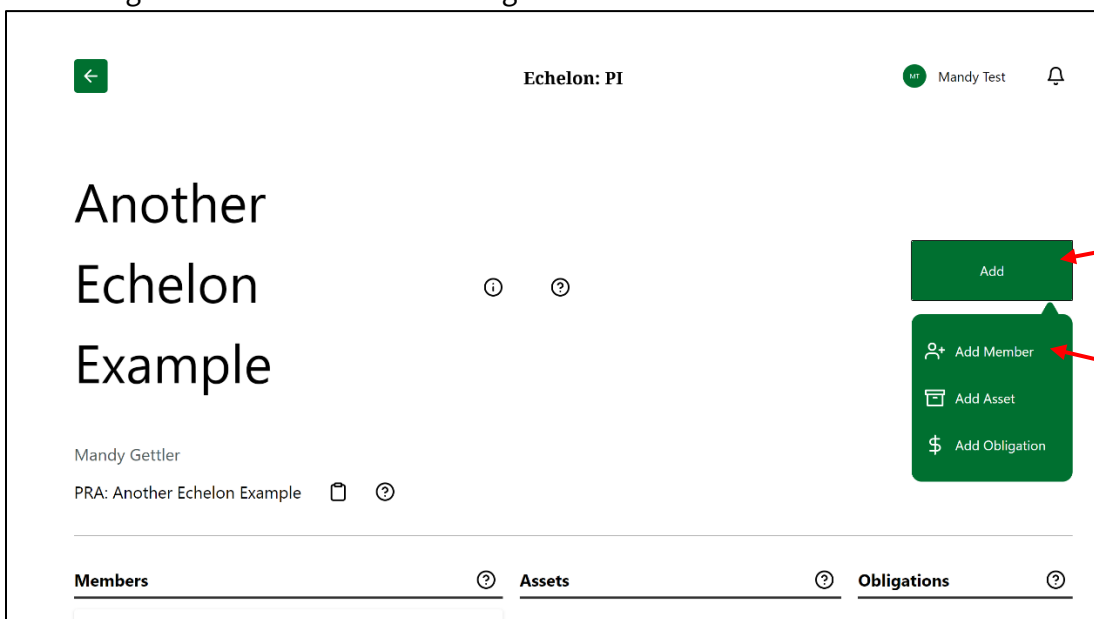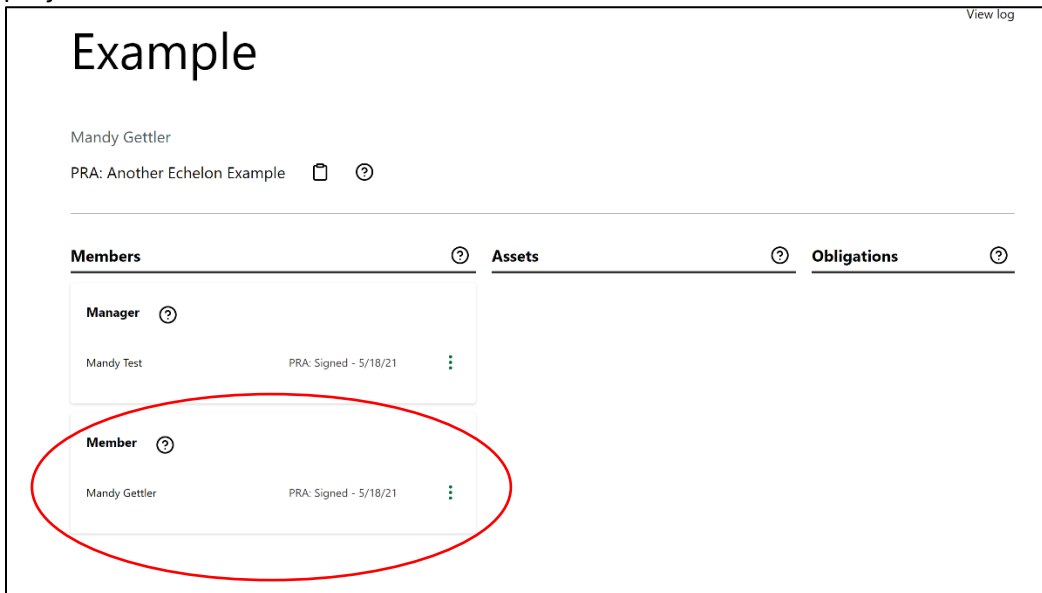

5. Enter the email address of the person you want to add.

6. From the drop-down menu, select the role you want that person to have. See definition of user roles above.
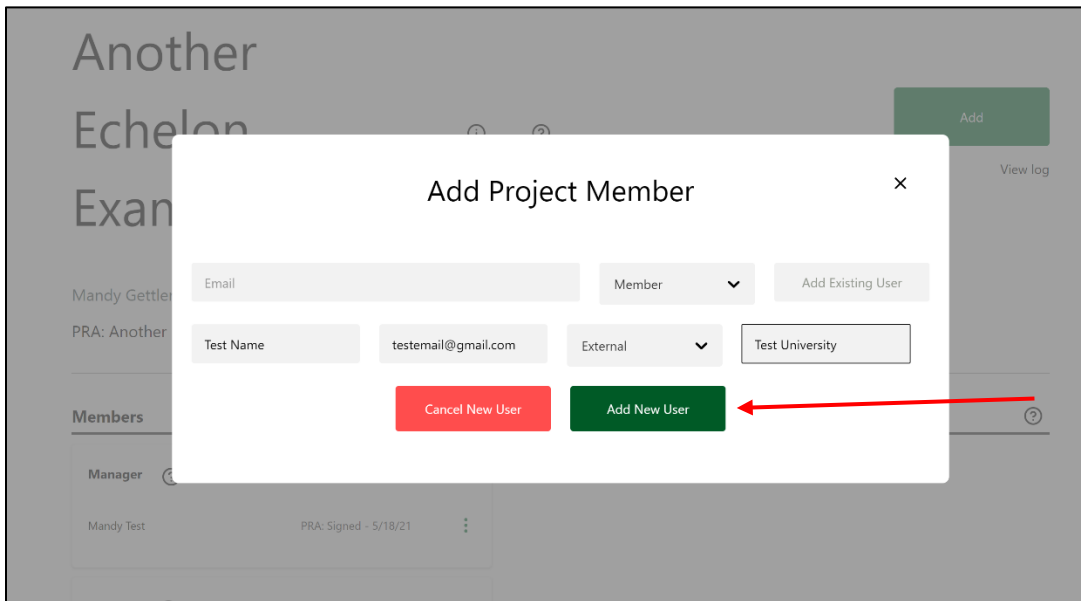7. Click the green "Add Existing User" button.

8. If that email address already exists in the system, you will see them added to your project on the left.
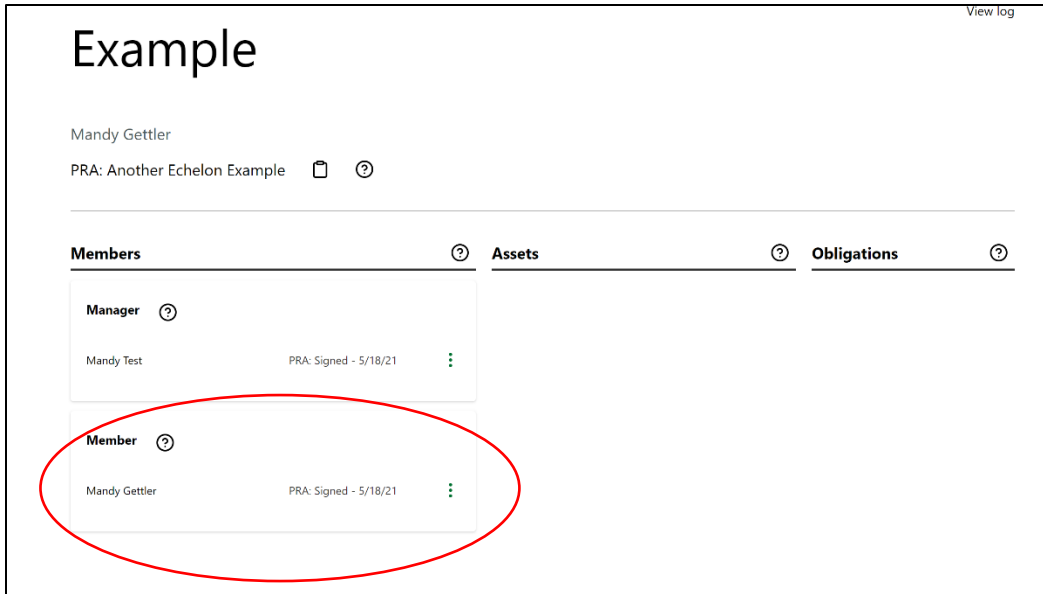

9. If the email address does not already exist in the system, the "Add Existing User" button will change to an "Add New User" button.
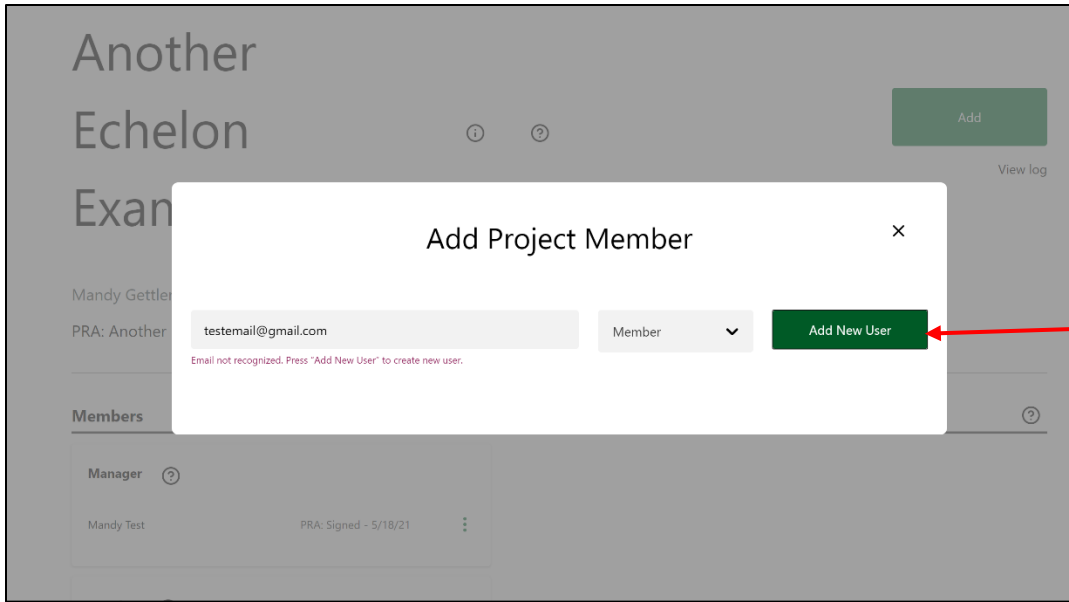
10. Enter the name of the person. The email will autofill based on what you entered in step 6. From the drop-down menu, select "external" if the person does not have an @uoregon.edu address. Then, enter their affiliation. If the person has an @uoregon.edu, select "UO."
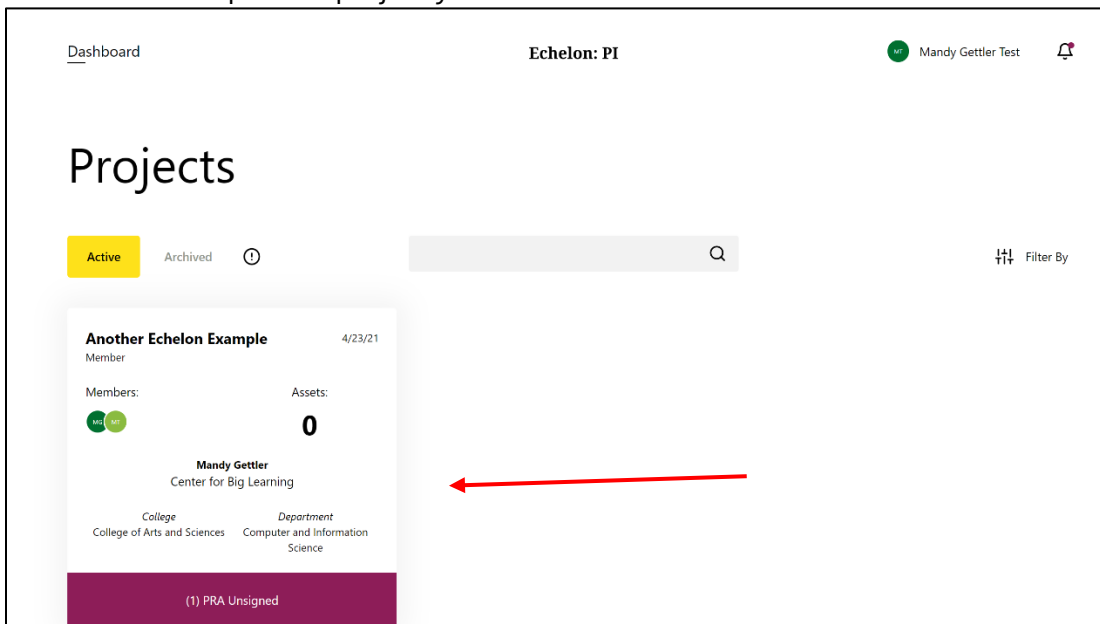

11. You will now see that user added to your project under the "Members" heading.

Example

Mandy Gettler

PRA: Another Echelon Example 📋 ⊘

Members ⊘	Assets ⊘	Obligations ⊘

Manager ⊘

Mandy Test   PRA: Signed - 5/18/21   ⋮

Member ⊘

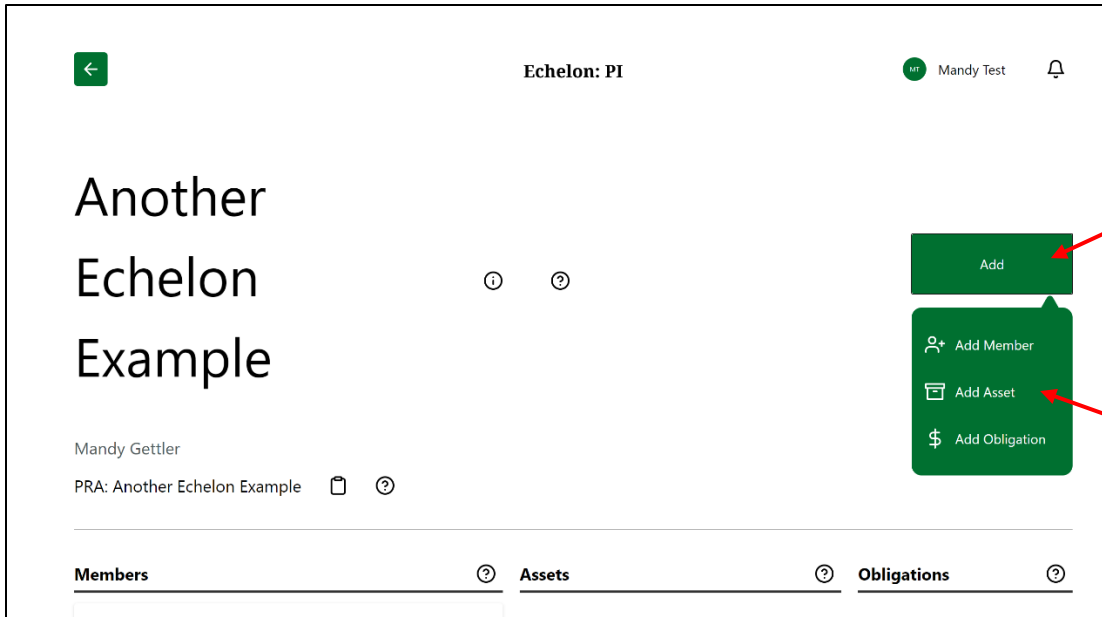Mandy Gettler   PRA: Signed - 5/18/21   ⋮

Adding Assets to a Project

Project Managers, Project Supervisors, and Members may add assets to a project. To do so:

1. Follow the procedures above to login.
2. After logging in, you will arrive at your dashboard. Here, you will see all your active projects.
3. Click the tile to open the project you want to add assets to.

Dashboard   **Echelon: PI**   🟢 MT Mandy Gettler Test 🔔

Projects

Active	Archived ⓘ	🔍	↕ Filter By

Another Echelon Example   4/23/21
Member

Members: Assets:
🟢MG 🟢MT   **0**

Mandy Gettler
Center for Big Learning

College   *Department*
College of Arts and Sciences   Computer and Information Science

(1) PRA Unsigned

4. Click the green "Add" button on the right and select "Add Asset."

5. Enter a descriptive title in the "Asset Title" field.
6. Enter a URL in the "Link URL" field. A link is required. If the asset you are adding does not have a link, you may enter "www.none.com."
7. From the drop-down menu, select the type of asset you are adding.
8. Enter a brief description of the asset you are adding.
9. From the drop-down menu, select the sentence that best describes how this asset was created. This is the asset's origin story.
10. If you have a document or image you would like to attach, click the "Attach" button, find the file on your computer, and select it. Click "open."
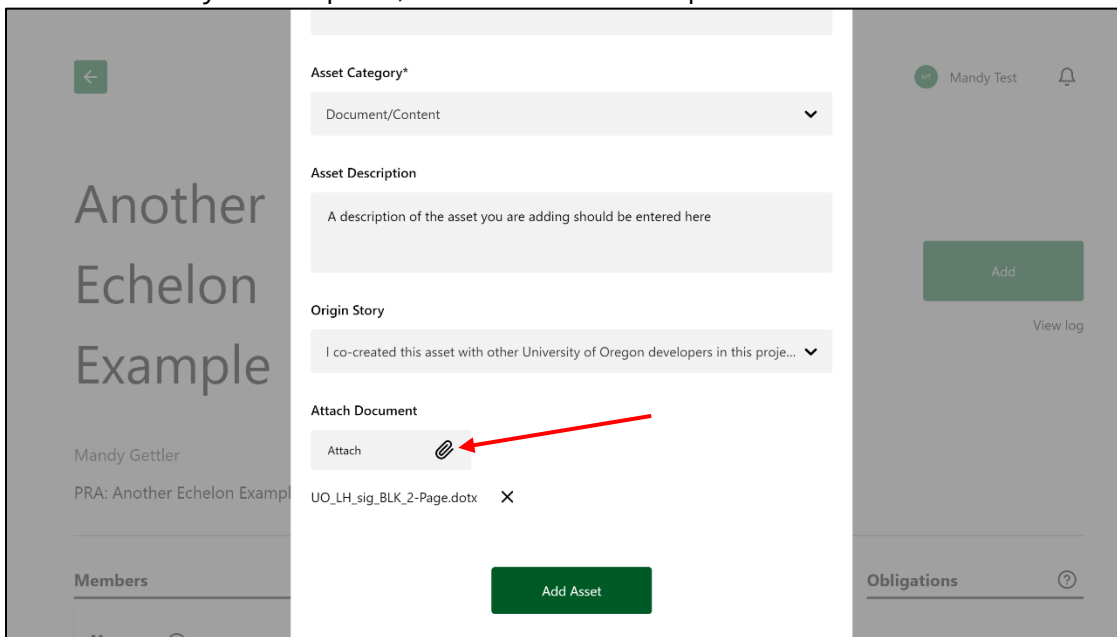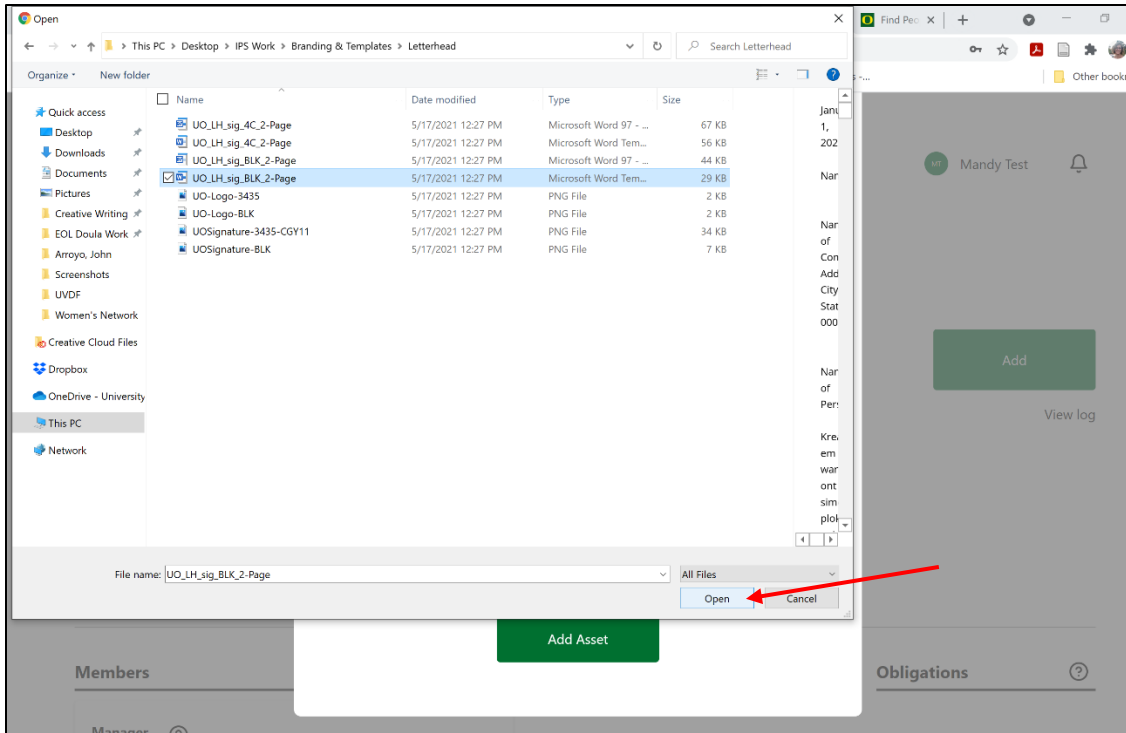
11. To finish, click the green "Add Asset" button.
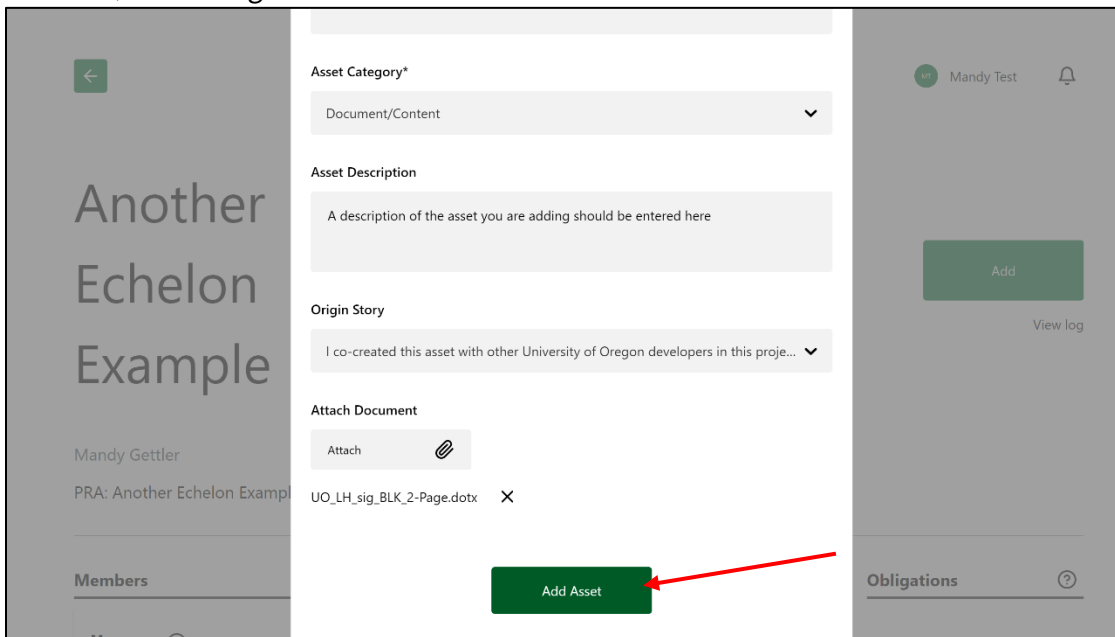
Note: If you receive a message that says "network error" at this stage, the file size is too large to upload. The current file size limit is 500MB. If you have a file larger than that, we recommend putting the file in OneDrive and putting the OneDrive share URL in the Asset URL field. Feel free to contact Senior Innovation Asset Administrator Mandy Gettler at mandyl@uoregon.edu or 541-346-1773 for assistance.

Approving Assets: Managers and Supervisors Only

Project Managers and Project Supervisors can review assets that Managers, Supervisors, and Members have added. To do so:
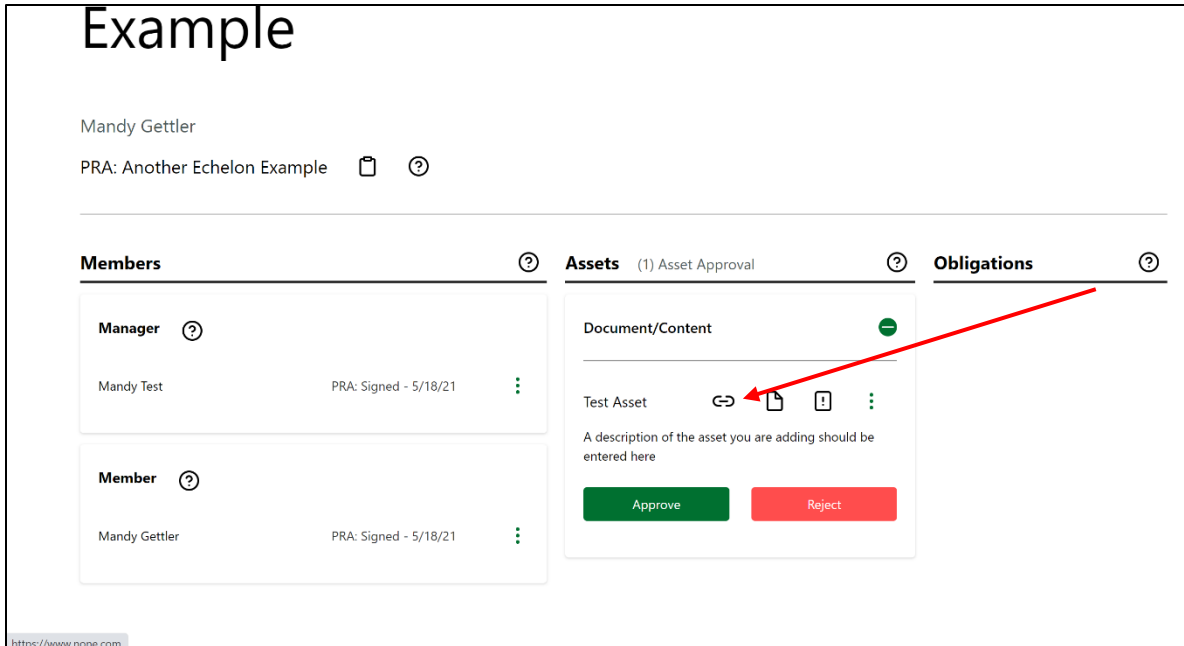
1. Follow the procedures above to login.
2. After logging in, you will arrive at your dashboard. Here, you will see all your active projects.
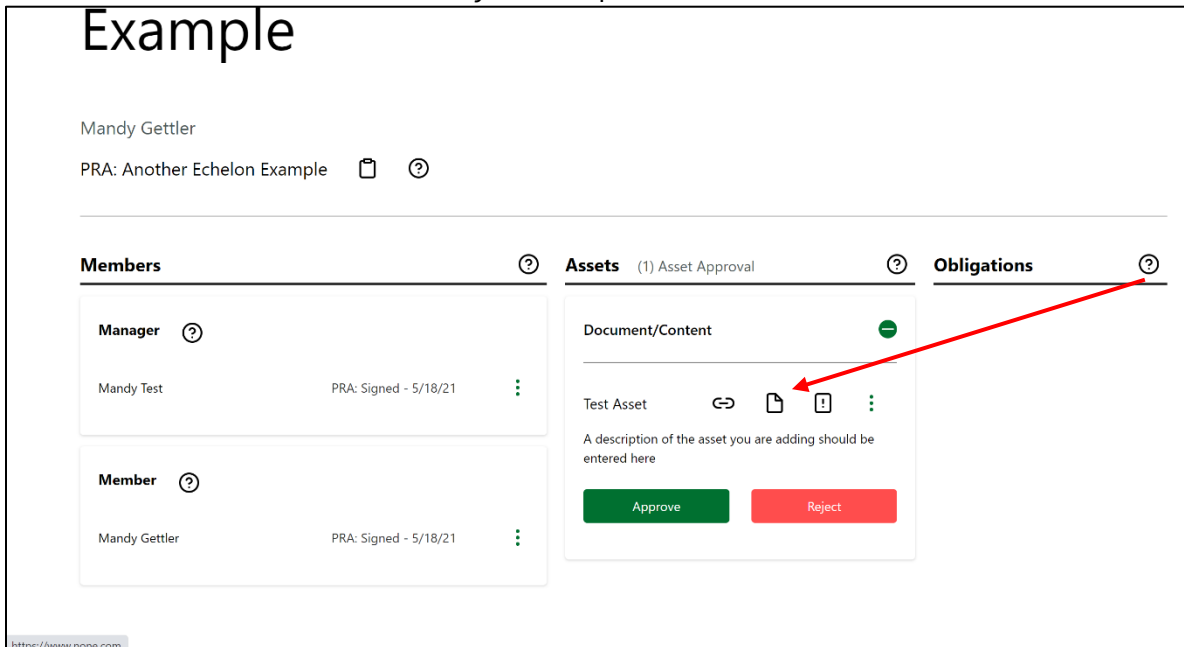3. Click the tile to open the project with assets you would like to review.
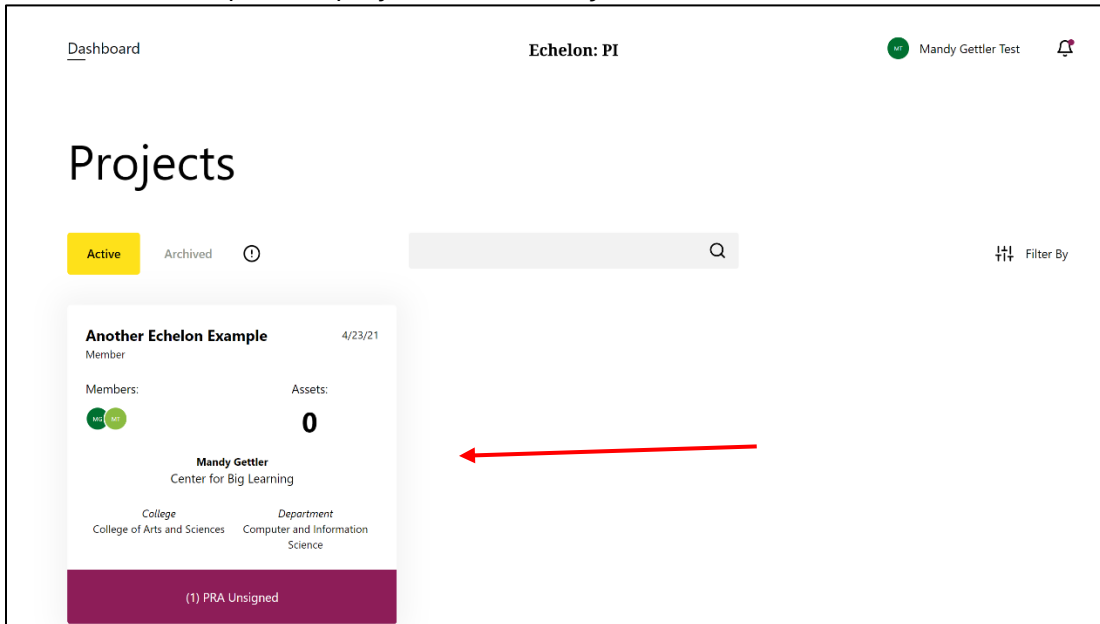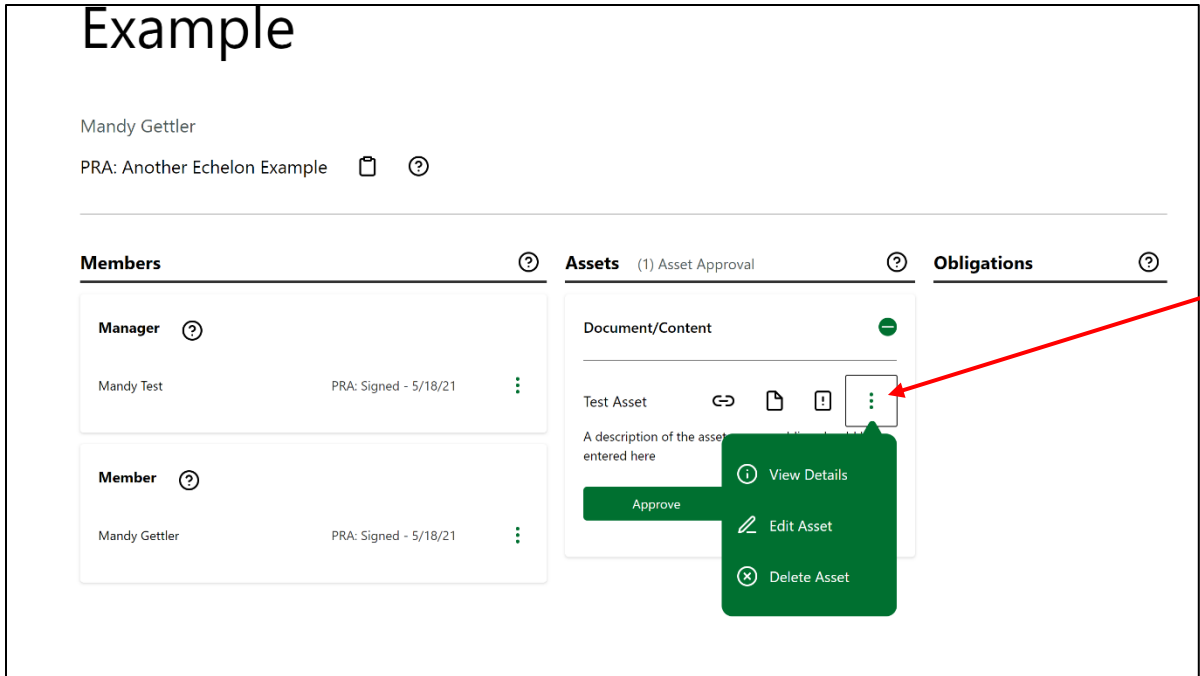

4. Select the green plus sign next to the asset.
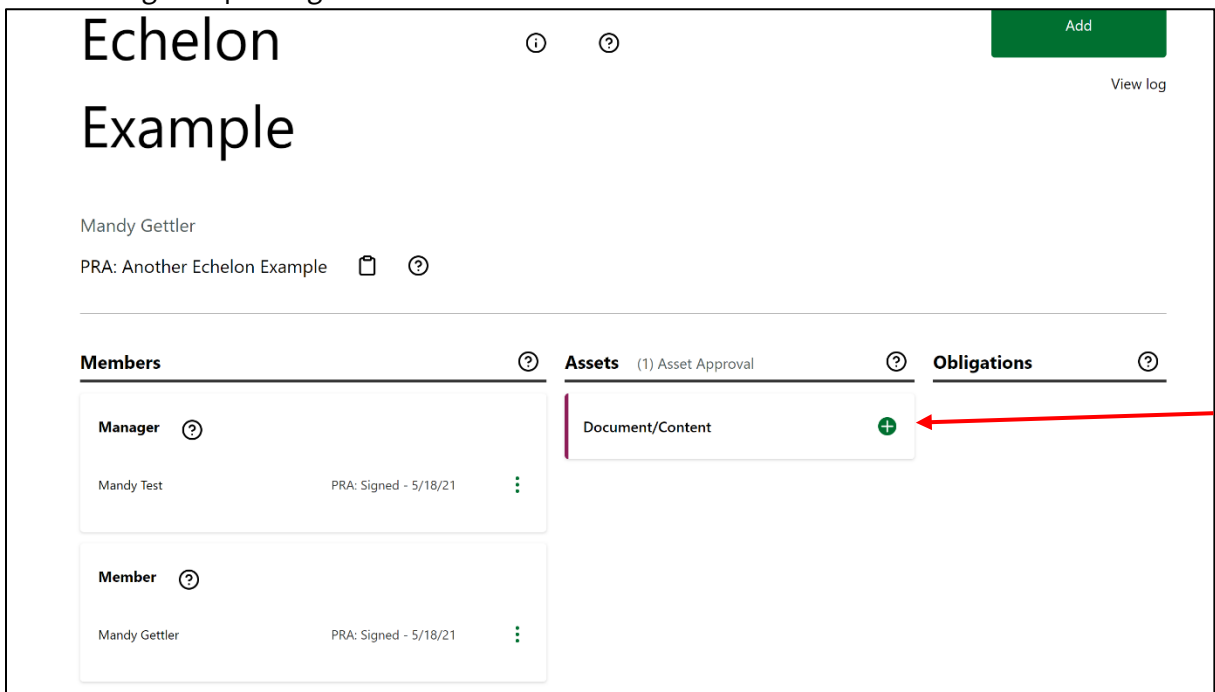
5. To view the link associated with the asset, click the link icon.
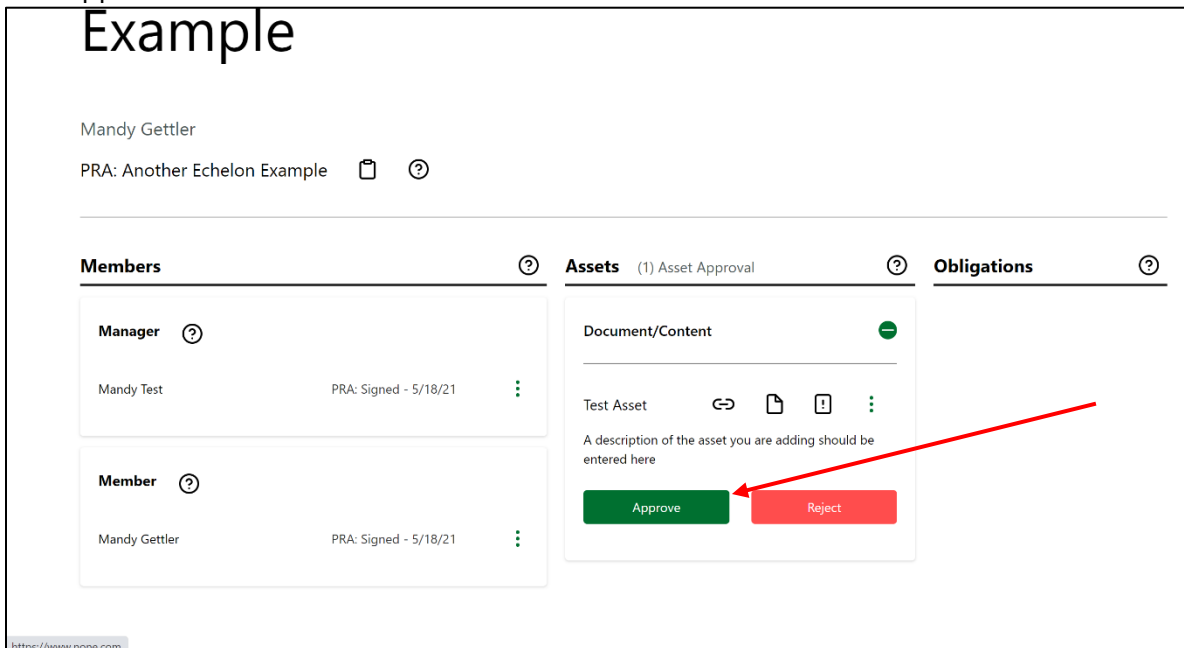
6. To view the document or image associated with the asset, click the document icon. The document will be downloaded onto your computer.
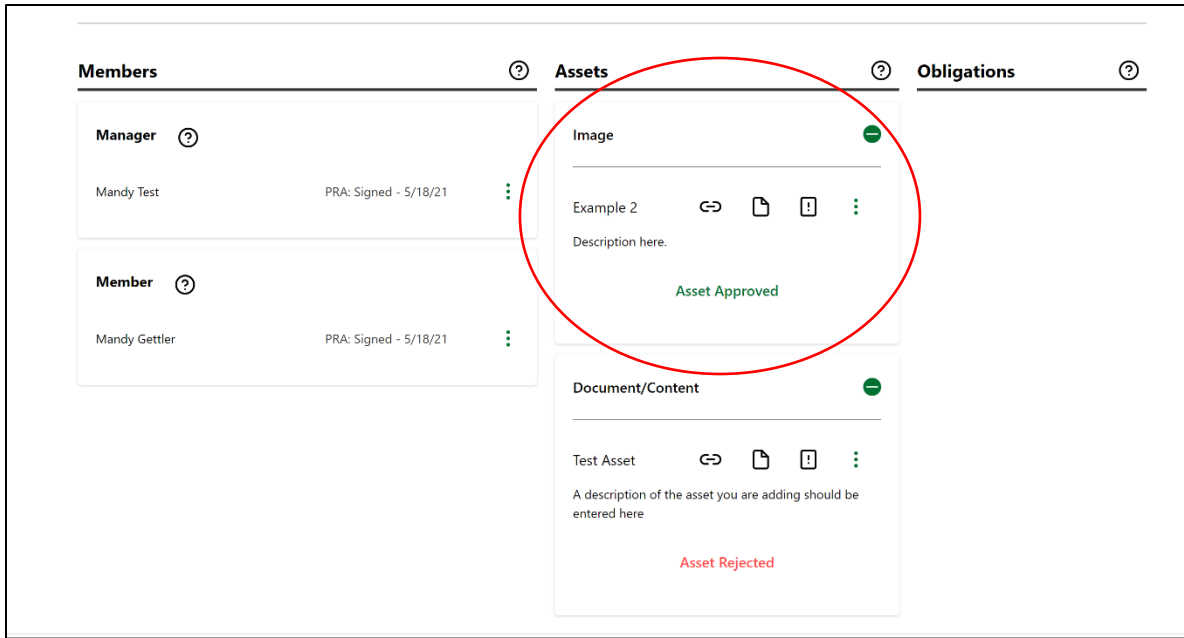

7. Click the three vertical dots to expand the menu. From here, you may view the asset details, edit the asset, or delete the asset.
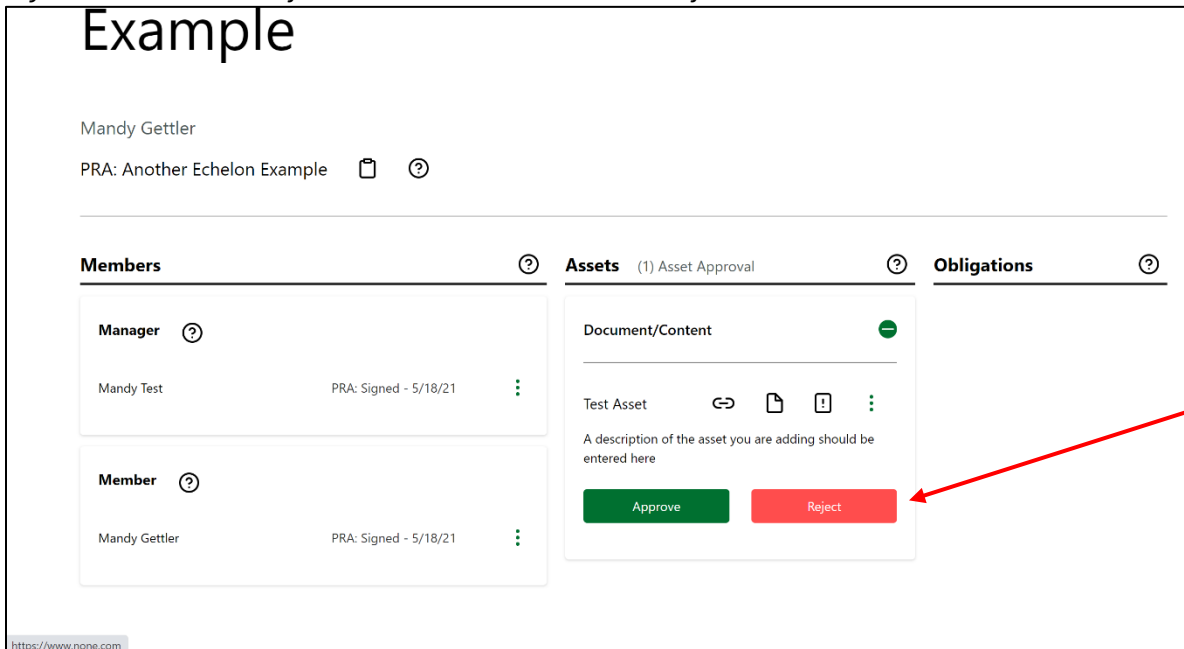
Example

Mandy Gettler

PRA: Another Echelon Example

Members ⑦

Manager ⑦

Mandy Test   PRA: Signed - 5/18/21   ⋮

Member ⑦

Mandy Gettler   PRA: Signed - 5/18/21   ⋮

Assets (1) Asset Approval ⑦

Document/Content ⊖

Test Asset   🔗 📄 ❗ ⋮

A description of the asset...
entered here

ⓘ View Details

Approve

✏ Edit Asset

⊗ Delete Asset

Obligations ⑦

8. If you would like to approve the asset, click the green "Approve" button. The asset is now approved.

Example

Mandy Gettler

PRA: Another Echelon Example

Members ⑦

Manager ⑦

Mandy Test   PRA: Signed - 5/18/21   ⋮

Member ⑦

Mandy Gettler   PRA: Signed - 5/18/21   ⋮

Assets (1) Asset Approval ⑦

Document/Content ⊖

Test Asset   🔗 📄 ❗ ⋮

A description of the asset you are adding should be entered here

Approve   Reject
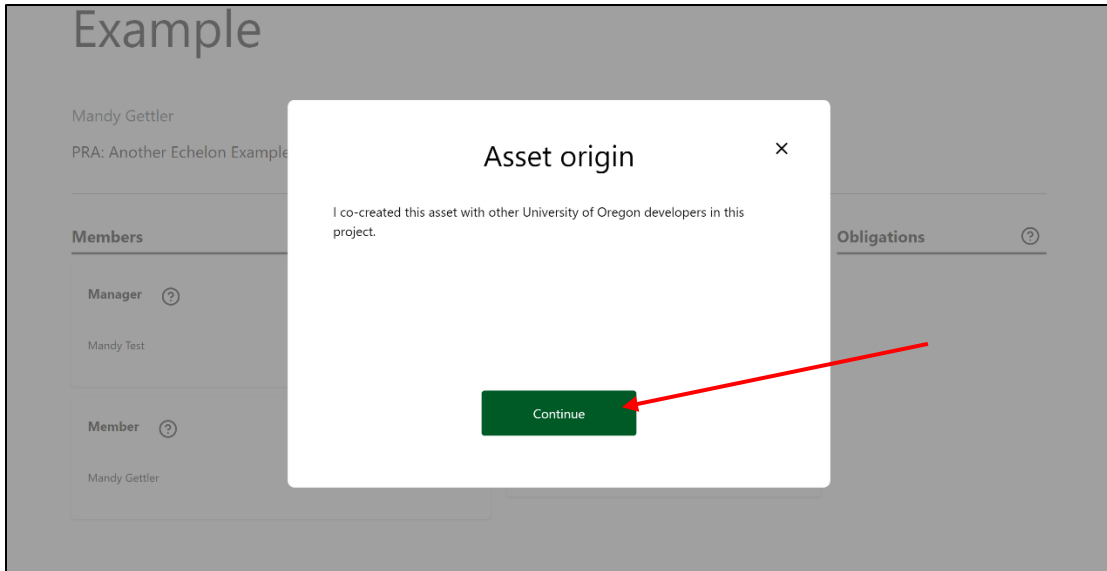
Obligations ⑦

https://www.none.com

18

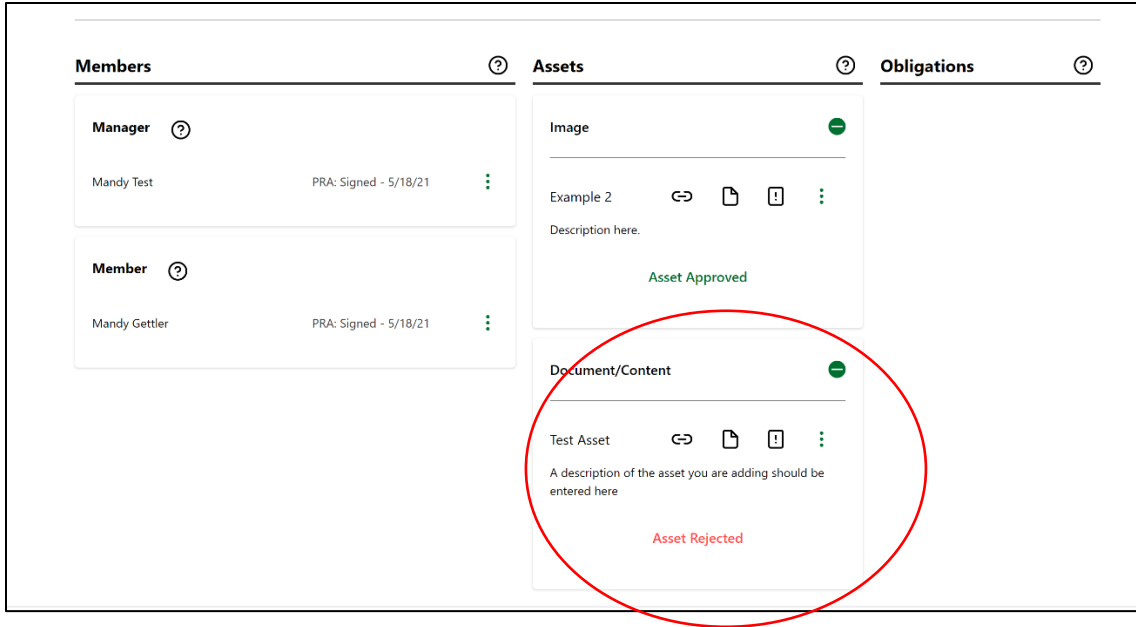9. If you would like to reject the asset, click the red "Reject" button.

10. When you click "Reject," you will see the origin story for that asset. The origin story tells how the asset was created. Click the green "Continue" button.

11. In the dialog box, enter your reason for rejecting the asset. Then, click the red "Reject" button. The asset is now rejected.
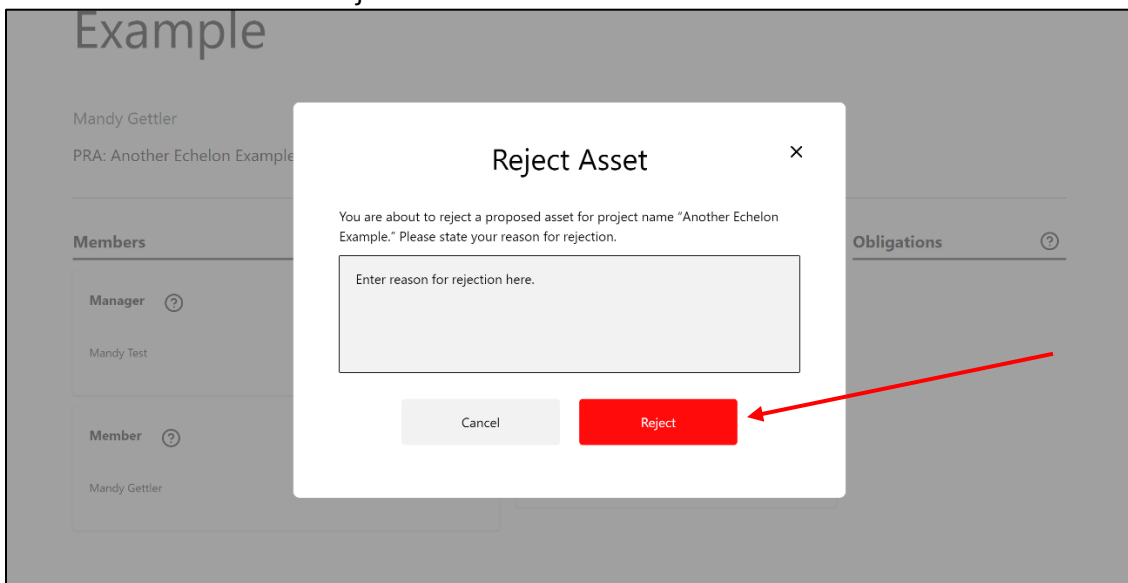
Signing Project Rules Agreements

Project Supervisors, Project Managers, and Project Members need to sign the project rules agreement (PRA) associated with the project. To do so:

1. Follow the procedures above to login.
2. After logging in, you will arrive at your dashboard. Here, you will see all your active projects.
3. Click the tile to open the project with the PRA you want to sign.
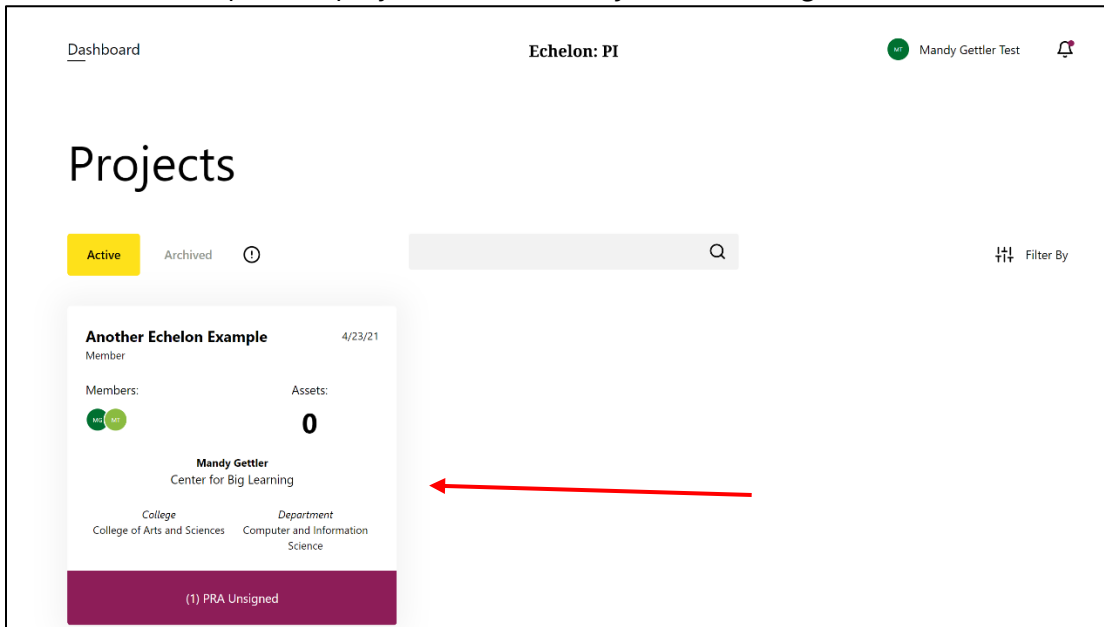
4. Read through the PRA. If you have questions about the terms included, you may contact the Project Supervisor or Innovation Partnership Services at techtran@uoregon.edu.

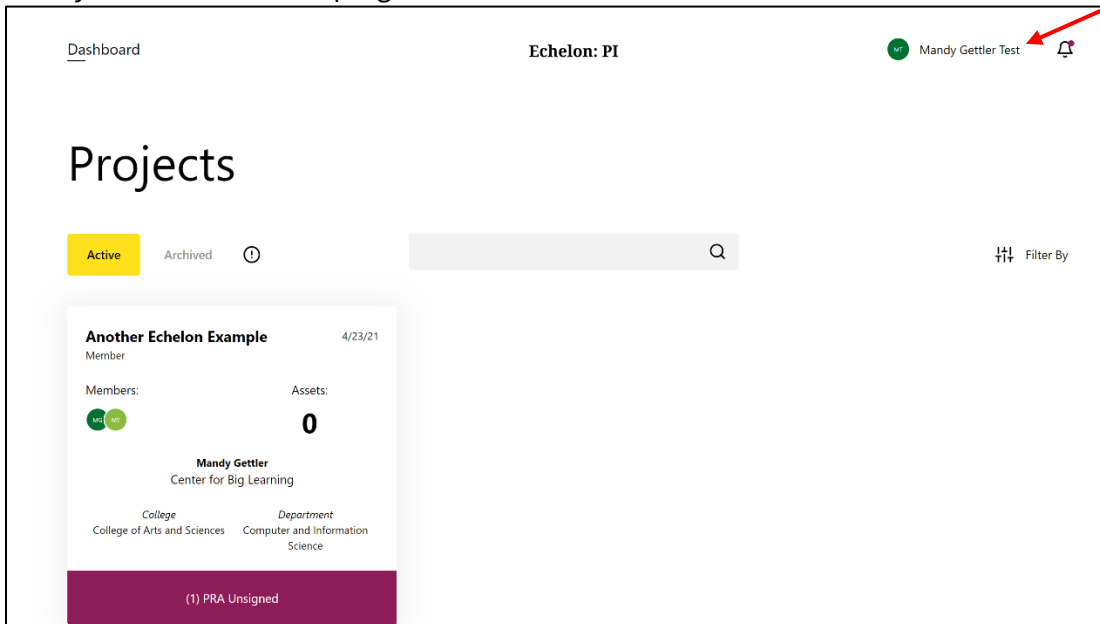5. To sign the PRA, type your name in the box below and click "Sign."
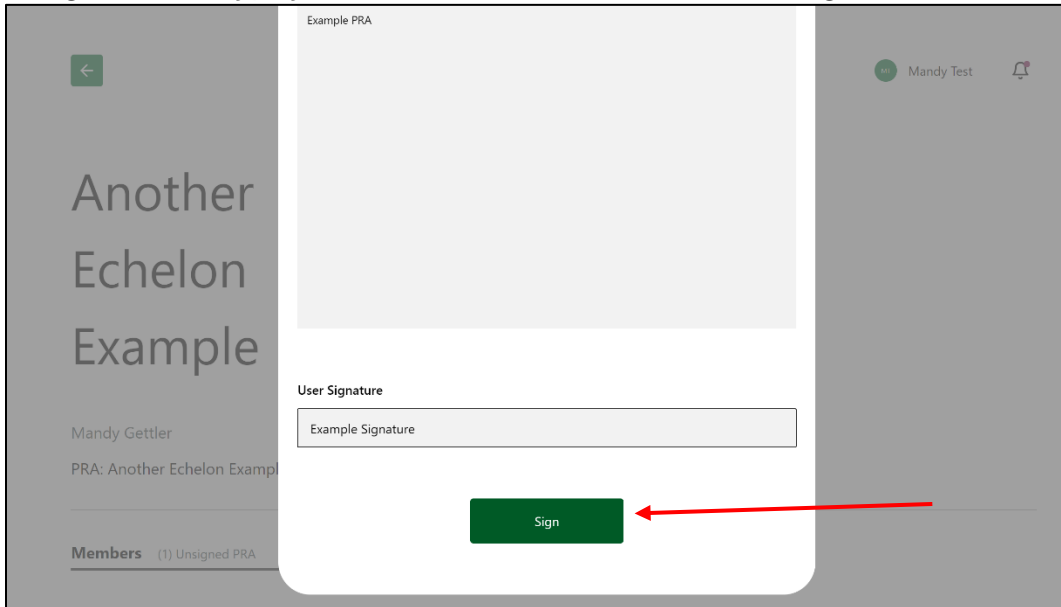
6. Congratulations! You have now signed the PRA.

Logging Out

To maintain the security of your project, we recommend logging out after every session. To do so:

1. Click your name in the top right of the screen.

2. Scroll to the bottom and click the red "Logout" button.

Questions?

Have questions about using Echelon: PI? We're here to help! Contact Senior Innovation Asset Administrator Mandy Gettler at mandyl@uoregon.edu or 541-346-1773.