

California Institute of Technology

Jet Propulsion Laboratory



Interdivisional
Authorization
Management System
(IAMS)

Quick Start User Guide

Release Date 1/01/2014



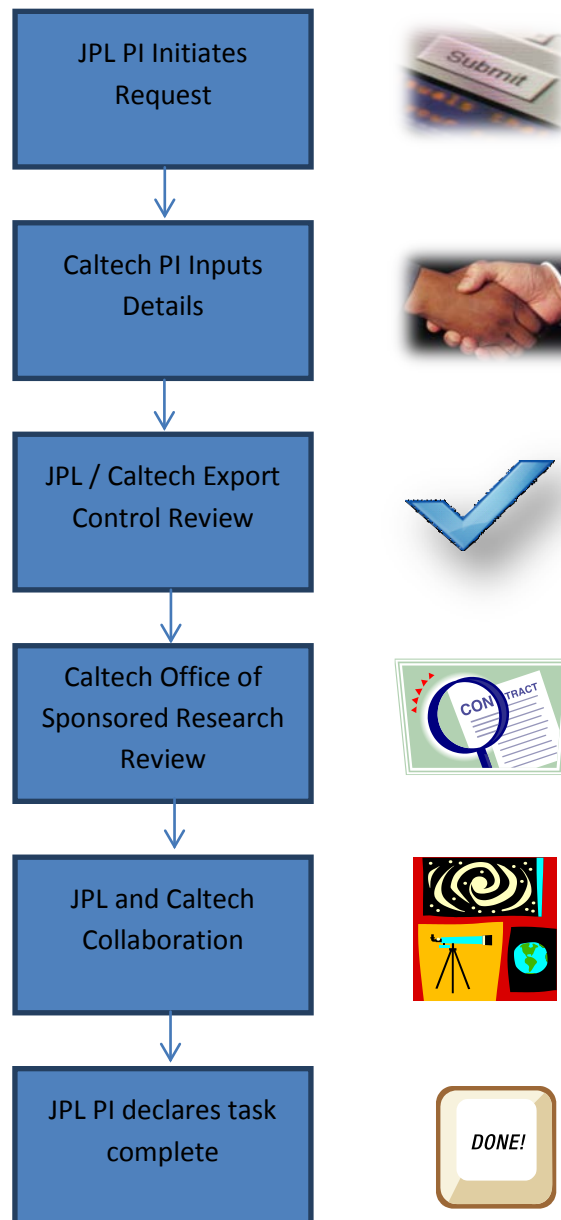
Contents

1) The Interdivisional Authorization Process	3
2) Accessing the website	4
a) Select your authentication type.....	4
b) JPL Username and JPL password.....	5
c) Caltech Employee Authentication	5
3) The Home Page	6
4) Initiate a New Request for Interdivisional Authorization	7
a) The New IA Request input form.....	7
b) Selecting a Caltech Principal Investigator	7
5) IA Initiate Task Request Page Navigation	8
a) Page Buttons	8
b) Submit the Request.....	9
6) Caltech Principal Investigator: Submit the Proposal.....	10
a) Prepare or Revise the Proposal.....	10
b) Page Buttons	11
c) Submit the Proposal.....	11
7) Finding Your Current IA Requests	12
8) Finding Your Action Items.....	12
9) Completion of the IA Request.....	13
10) If You Have Questions.....	13

1) The Interdivisional Authorization Process

An Interdivisional Authorization (IA) is an accounting vehicle by which JPL provides funds to Caltech to cover the cost of activities carried out by Caltech in collaboration with JPL, the NASA Prime Contract and other authorized Laboratory customers. The Interdivisional Authorization Management System (IAMS) is the online application that allows IAs to be processed quickly and effectively, with full tracking of each IA through the entire process.

The IA Process Steps and Roles Overview



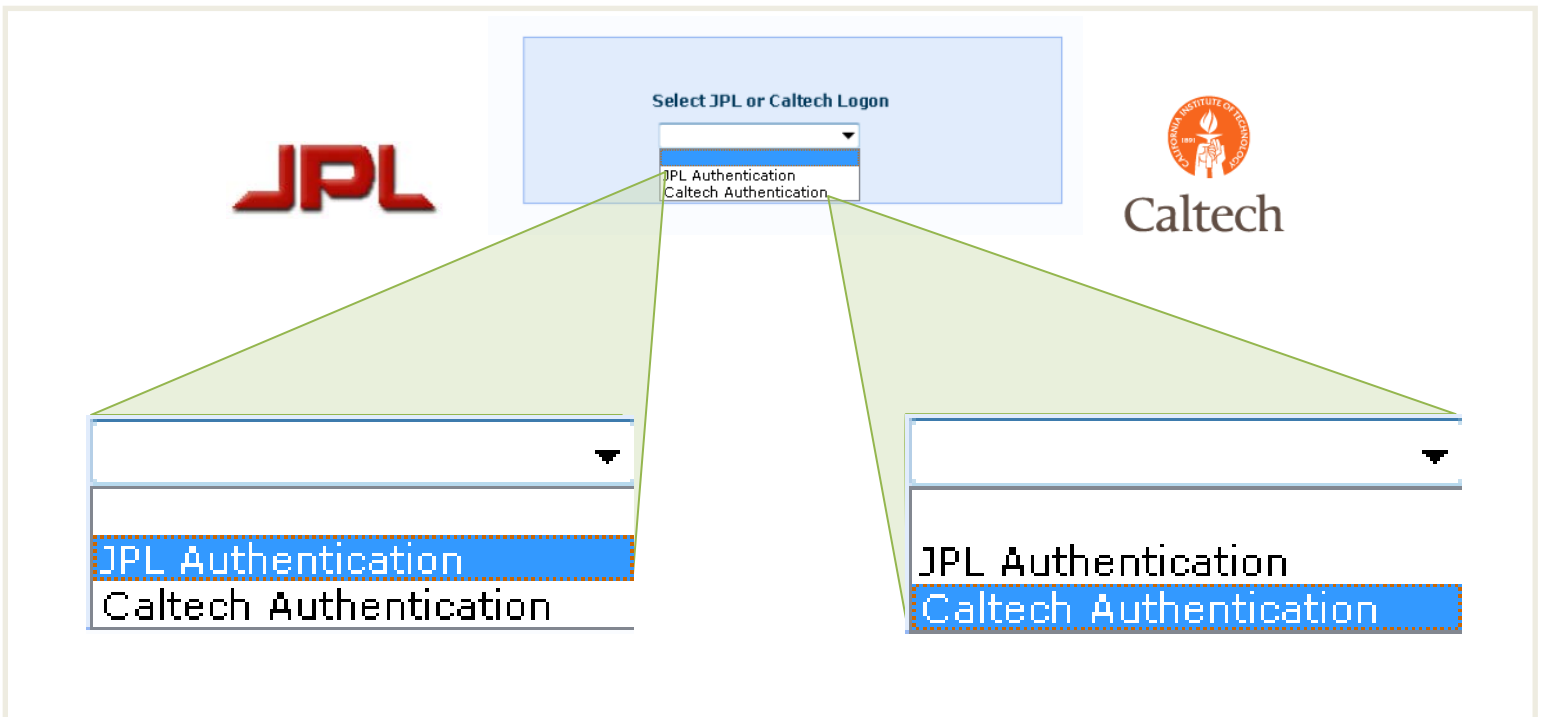
2) Accessing the website

Access the website by entering <https://iams.ext.jpl.net> in a web browser. The first page you see is a credentials option selection box.



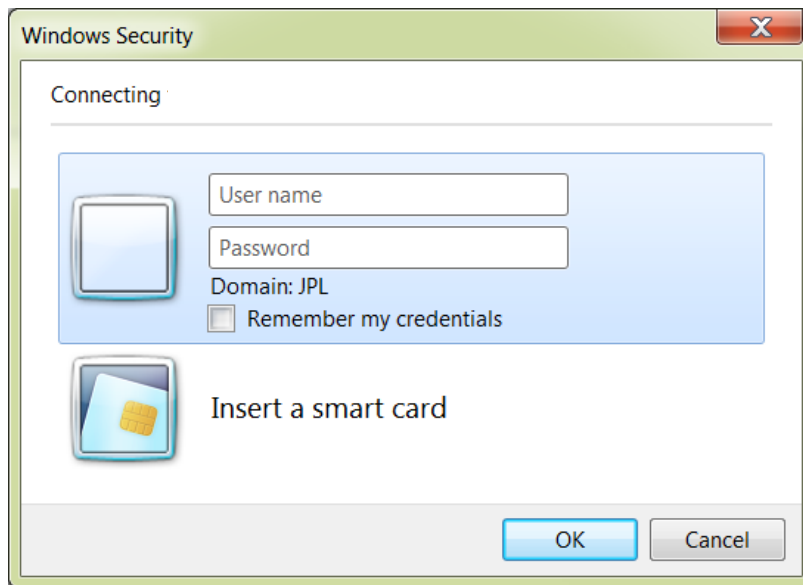
a) Select your authentication type

JPL employees select the 'JPL Authentication' option from the pull-down menu. Caltech employees select the 'Caltech Authentication' option.



b) JPL Username and JPL password

JPL employees enter their JPL username and JPL password.



c) Caltech Employee Authentication

Caltech employees enter their "Access" username and password.



3) The Home Page

After you are authenticated into IAMS, the Home page will display.

The screenshot shows the 'Interdivisional Authorization' home page. At the top, there is a navigation bar with links: Home, New IA Request, My Assignments, My Completed Assignments, My IA Requests, Metrics, and Help Resources. Below the navigation bar, the main content area is titled 'Home' and contains five main links, each with an icon and a description:

- Submit New Request for Interdivisional Authorization**: This link is for Laboratory Interdivisional Authorization business users. Submit only one new proposal document per record.
- View My Assignments**: This link is to access your pending Interdivisional Authorization proposal tasks requiring completion.
- View My Completed Assignments**: This link is to access your completed Interdivisional Authorization proposal tasks.
- View My Requests**: This link is to access your Interdivisional Authorization proposal submissions and their status.
- Metrics**: This link is to run metrics in the Interdivisional Authorization system.

The center links are identical to some of the top-navigation links.

This screenshot is identical to the one above but includes red arrows pointing from the top navigation links to the corresponding main content links, illustrating that the center links are identical to some of the top-navigation links:

- Red arrow from 'New IA Request' to 'Submit New Request for Interdivisional Authorization'
- Red arrow from 'My Assignments' to 'View My Assignments'
- Red arrow from 'My Completed Assignments' to 'View My Completed Assignments'
- Red arrow from 'My IA Requests' to 'View My Requests'
- Red arrow from 'Metrics' to 'Metrics'

4) Initiate a New Request for Interdivisional Authorization

A new IA request is initiated by a JPL Principal Investigator (JPI). To initiate a new request, select the “Submit New Request for Interdivisional Authorization” link from the Home page.



Submit New Request for Interdivisional Authorization

This link is for Laboratory Interdivisional Authorization business users. Submit only one new proposal document per record.

a) The New IA Request input form

When the “Submit New Request for Interdivisional Authorization” link is selected, the JPL Principal Investigator (JPI) will be presented with the “Initiate IA Task Request” input form. All fields must be completed before you can submit the request.

b) Selecting a Caltech Principal Investigator

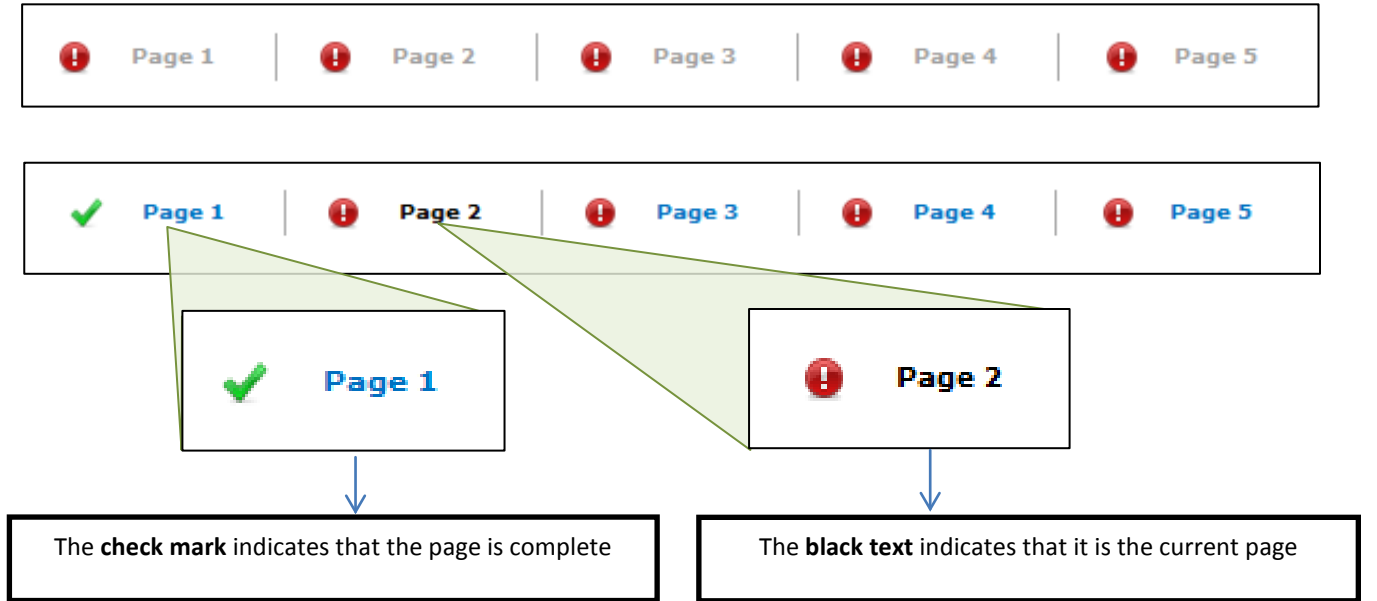
When filling out the “Initiate IA Task Request” input form on page two, the JPL Principal Investigator (JPI) will need to select the name of the Caltech Principal Investigator (CPI) from a pull-down menu. To find the CPI, the CPI must be a registered user on the IAMS system. To register the CPI, the JPI or CPI needs to call the JPL help desk and ask for their name to be added to the system.

Caltech Principal Investigator (CPI) Contact Information

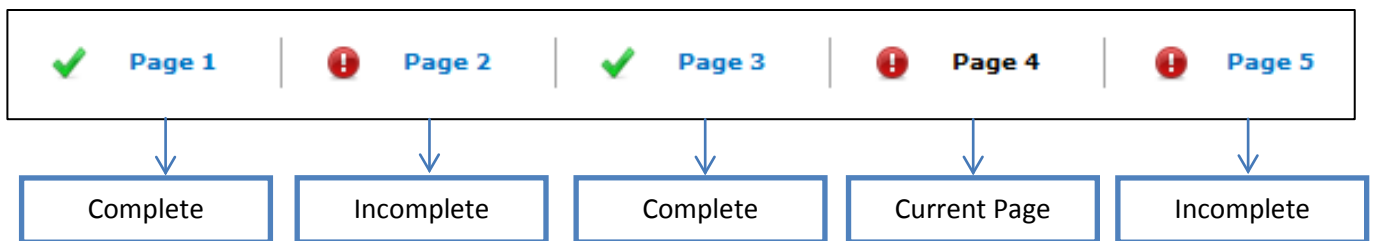
If you cannot find the CPI in the pick list, contact the JPL IT Service Desk - ext. 4-HELP, (818) 354-4357; <http://jplit.jpl.nasa.gov> to have the CPI added.

5) IA Initiate Task Request Page Navigation

The “Initiate IA Task Request” input form has five pages. When you access the input form, “Page 1” will display. The exclamation point indicates that the page is not complete. As you complete pages, the navigation will update with a green check mark to show pages are complete. Black text indicates the current active page.

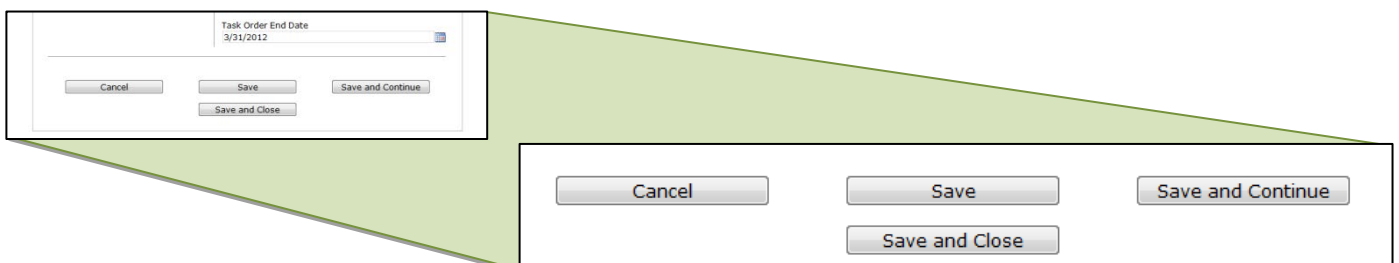


You may fill out the pages in any order. In this example, page one and three are done, page two is incomplete and the active page is number four. It is important to use the **Save** button to save your work before you move on to a new page.



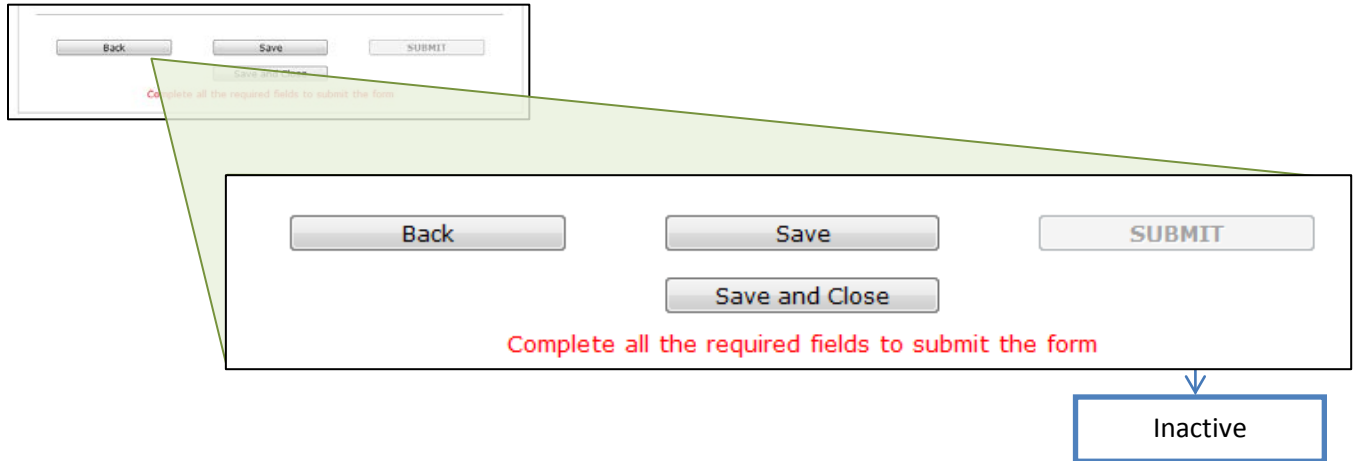
a) Page Buttons

- **Cancel:** Stops the request prior to filling out any information
- **Save:** Save what you have entered, and stay on the current page
- **Save and Close:** Save what you have entered, and close the request page
- **Save and Continue:** Save what you have entered, and continue to the next page

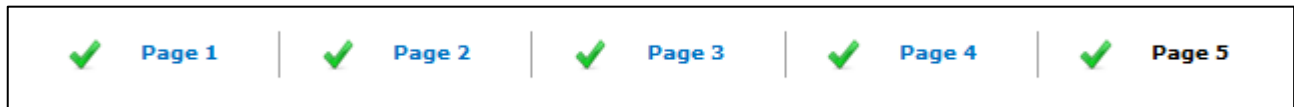


b) Submit the Request

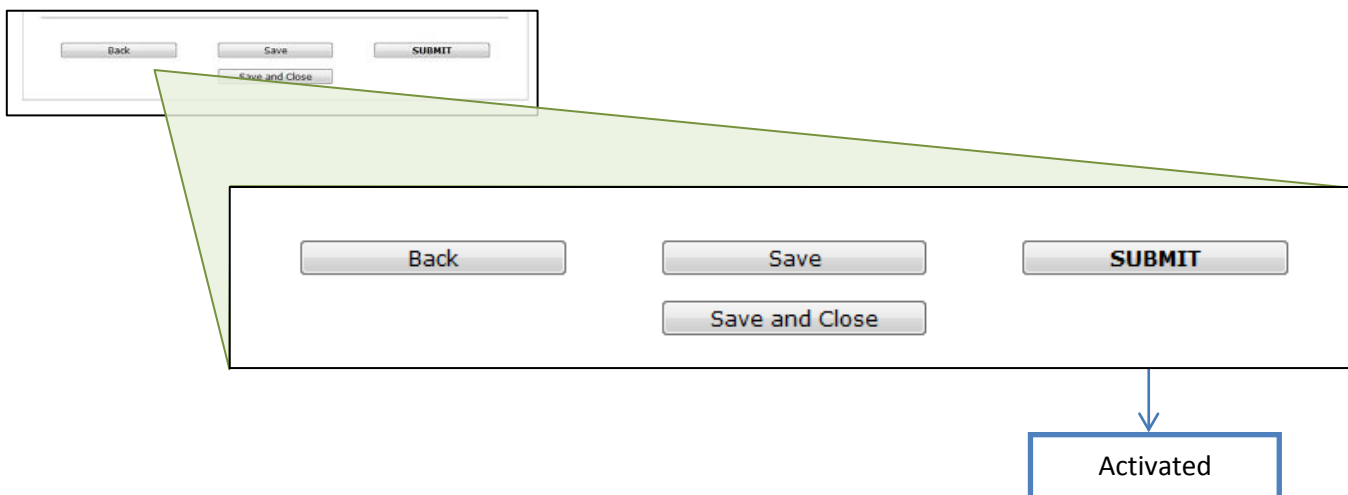
On page five you will see the SUBMIT button. The SUBMIT button is inactive until all five pages of the form are completed.



When all five pages are complete the links will all show green checkmarks.

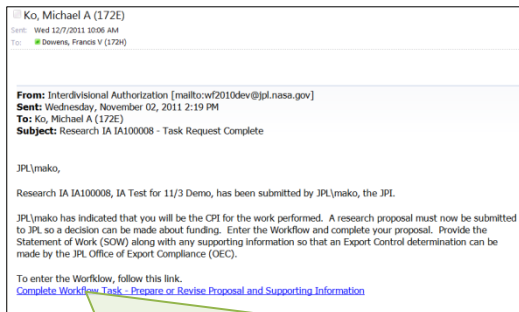


When all five pages show green check marks, the SUBMIT button will become active, and you may submit the Interdivisional Authorization request. When you press SUBMIT button, the Interdivisional Authorization process is initiated.



6) Caltech Principal Investigator: Submit the Proposal

When the JPL Principal Investigator (JPI) has submitted the IA request, the Caltech Principal Investigator (CPI) will receive an email notification. The email will include the title of the request, information about the task that the CPI needs to perform, and a link that directs the CPI to “Prepare or Revise Proposal and Supporting Information” input form for that specific IA request. The IA request task will also appear in the CPI’s “View My Assignments” inbox (see Part 8).



To enter the IAMS, follow this link.
[Complete Assignment - Prepare or Revise Proposal and Supporting Information](#)

a) Prepare or Revise the Proposal

When the Caltech Principal Investigator (CPI) clicks the link in the email, the “Prepare or Revise Proposal and Supporting Information” input form displays.

The screenshot shows the 'Interdivisional Authorization' form with the title 'PREPARE OR REVISE PROPOSAL' and the JPL logo. The form includes the following sections:

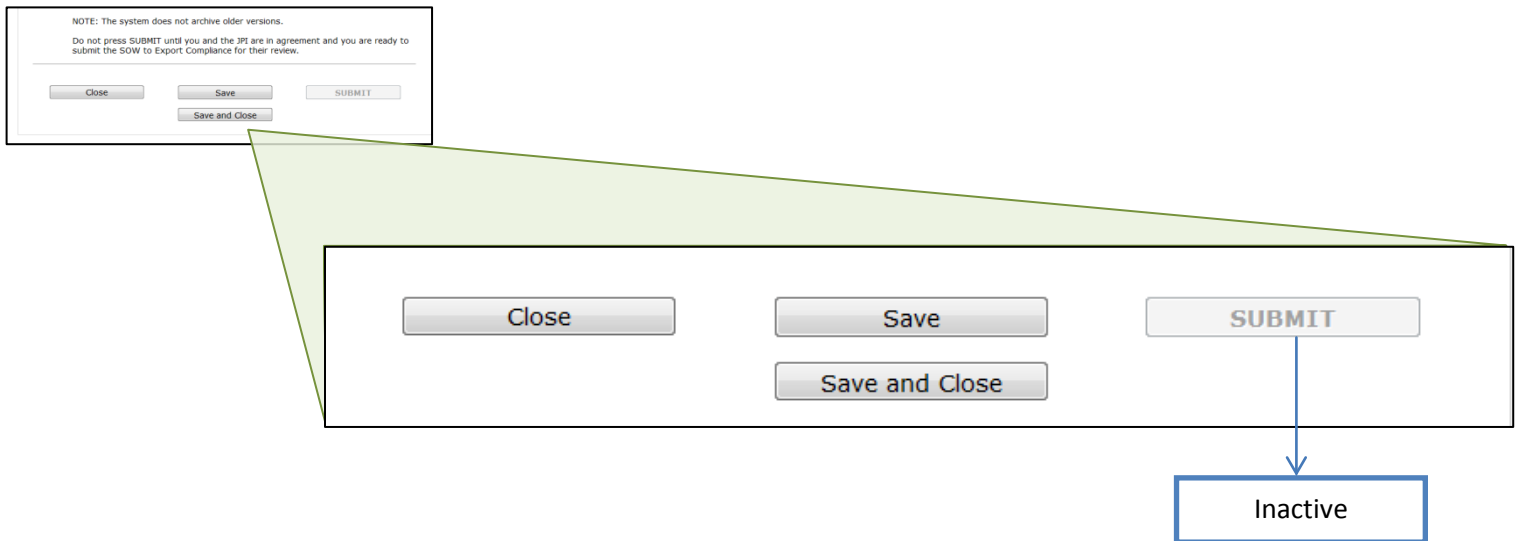
- Required fields:** A note to click the 'IA Task Request' link to view reports.
- Task Title:** Characterization in Planetary Environments
- Task Summary:** Task Summary. Provide a brief summary of the nature and purpose of this task.
- Anticipated Period of Performance:** Start Date: 3/1/2012, End Date: 4/30/2012
- 1. Grant Manager (GM) Contact Information:** Fields for Name, Full Phone Number, and Email.
- 2. Office of Sponsored Research (OSR) Grant Analyst Contact Information:** Fields for Name, Full Phone Number, and Email.
- 3. Will there be other Campus Collaborators?:** Radio buttons for Yes and No.
- 4. Will there be any parties other than JPL and Campus that will participate in this task?:** Radio buttons for Yes and No.

b) Page Buttons

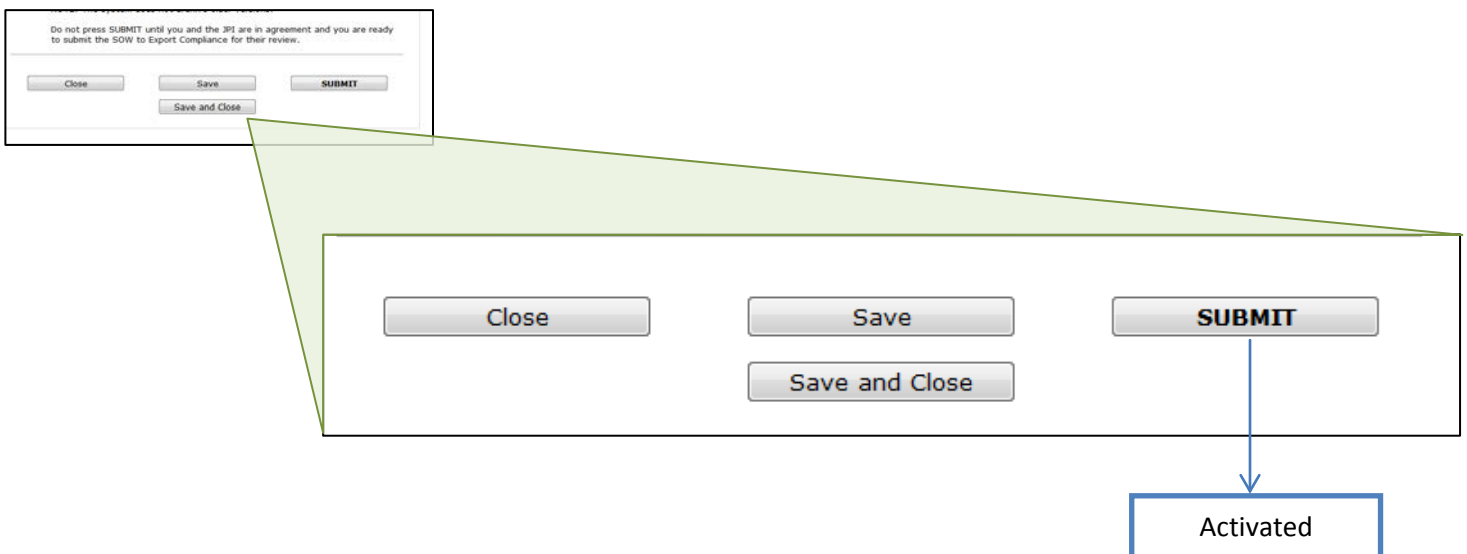
- **Save:** Save what you have entered, and stay on the page
- **Save and Close:** Save what you have entered, and close the page
- **Close:** Close the page and discard all information
- **Submit:** Submit the Proposal

c) Submit the Proposal

On the bottom on the page you will see the SUBMIT button. The SUBMIT button is inactive until all page elements are filled out and all requested files have been uploaded.



When all fields are filled out and all requested files have been uploaded, the SUBMIT button will become active.



7) Finding Your Current IA Requests

Clicking on the “View My Requests” link displays a listing of your current requests in the IA process.

Interdivisional Authorization

Home | New IA Request | My Assignments | My Completed Assignments | My IA Requests | Metrics | Help Resources

Home

- Submit New Request for Interdivisional Authorization**
This link is for Laboratory Interdivisional Authorization business users. Submit only one new proposal document per record.
- View My Assignments**
This link is to access your pending Interdivisional Authorization proposal tasks requiring completion.
- View My Completed Assignments**
This link is to access your completed Interdivisional Authorization proposal tasks.
- View My Requests**
This link is to access your Interdivisional Authorization proposal submissions and their status.
- Metrics**
This link is to run metrics.

My IA Requests

To see your Interdivisional Authorization proposal submission records and status, click on the item in the listing. You can re-sort the listing by clicking on the column headings.

Name	Task Title	State	Modified	Created
IA100001	Herschel OT1 - Lu	Awaiting OEC Determination	12/8/2011 4:38 PM	12/6/2011 10:40 AM
IA100003	Fast Methods for Bacterial Spore Viability Assessment	Awaiting OEC Determination	12/8/2011 3:49 PM	12/6/2011 11:47 AM

8) Finding Your Action Items

Clicking on the “View My Assignments” link displays a listing of pending actions awaiting your attention.

Interdivisional Authorization

Home | New IA Request | My Assignments | My Completed Assignments | My IA Requests | Metrics | Help Resources

Home

- Submit New Request for Interdivisional Authorization**
This link is for Laboratory Interdivisional Authorization business users. Submit only one new proposal document per record.
- View My Assignments**
This link is to access your pending Interdivisional Authorization proposal tasks requiring completion.
- View My Completed Assignments**
This link is to access your completed Interdivisional Authorization proposal tasks.
- View My Requests**
This link is to access your Interdivisional Authorization proposal submissions and their status.
- Me**
This link is to run metrics.

My Assignments

To see your Interdivisional Authorization proposal tasks waiting for your completion, click on the item in the listing. You can re-sort the listing by clicking on the column headings.

Title	Related Content	Status	Created	Modified
JPI: Resolve OEC Determination NEW	IA100008	Not Started	12/12/2011 8:36 AM	12/12/2011 8:36 AM
JPI: Resolve OEC Determination NEW	IA100009	Not Started	12/12/2011 8:38 AM	12/12/2011 8:38 AM

9) Completion of the IA Request

When the Caltech Principal Investigator (CPI) has completed and pressed SUBMIT on the “Prepare or Revise Proposal and Supporting Information” input form, the IAMS application will advance the IA request through to funding completion. The IA process is outlined in Part One (see section 1). During the process the JPI and CPI will receive E-mail notifications on tasks they need to perform to complete the IA. All participants can view the exact status and location of the IA task at any point in the process by selecting the ‘View My Requests’ link from the Home Page (see part 3).

10) If You Have Questions

For questions regarding the IAMS application or the IA process:

For JPL users who need assistance with technical system issues, contact the JPL IT Service Desk - ext. 4-HELP 4-4357; <http://jpllit.jpl.nasa.gov> . For procedural questions, contact Pat Spray - ext. 3-3096; Patricia.A.Spray@jpl.nasa.gov . For export control questions, contact Govind Deshpande - ext. 3-2703; Govind.K.Deshpande@jpl.nasa.gov .

For Campus users who need assistance with technical system issues, contact the JPL IT Service Desk – ext. 4-HELP (818) 354-4357; <http://jpllit.jpl.nasa.gov> . For procedural questions, contact Mary Gibson, (626) 395-2494; Mary.Gibson@caltech.edu . For export compliance questions, contact Adilia Koch, (626) 395-4469; Adilia.Koch@caltech.edu .