



PTAP

EXTERNAL USER REFERANCE GUIDE

02/02/2021

PTAP Grants Management System

Users' Guide

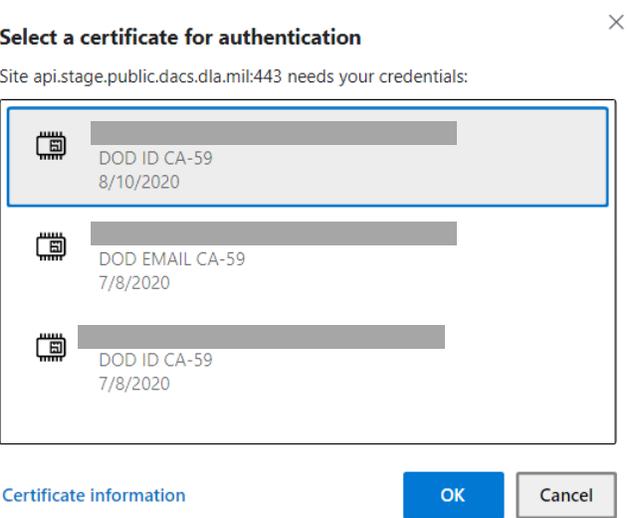
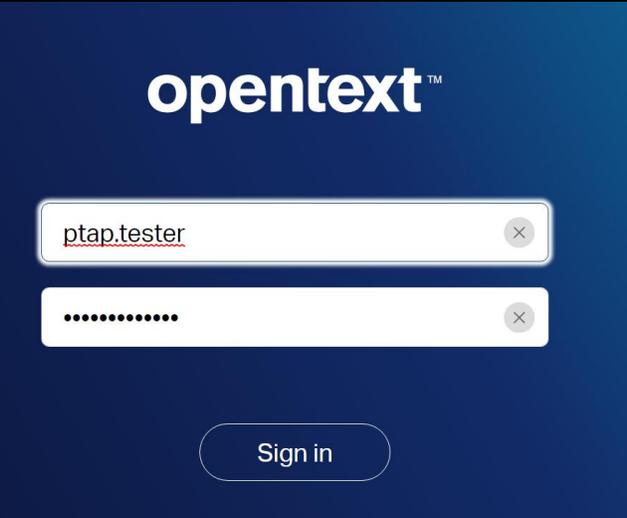
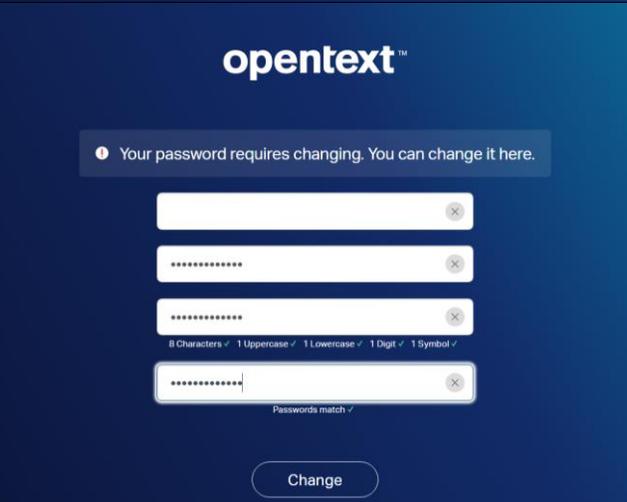
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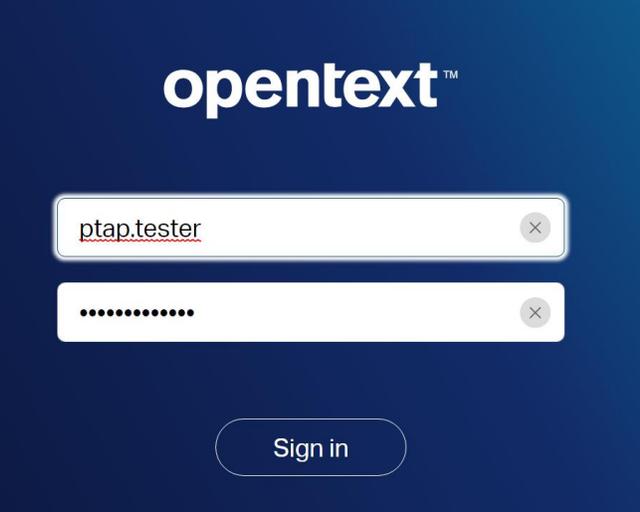
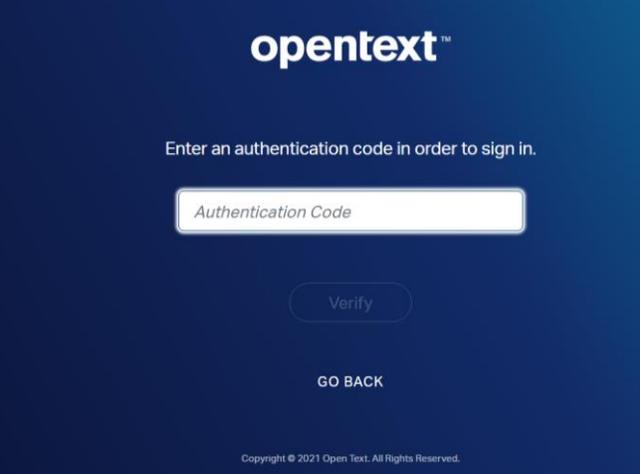
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External User Functionality

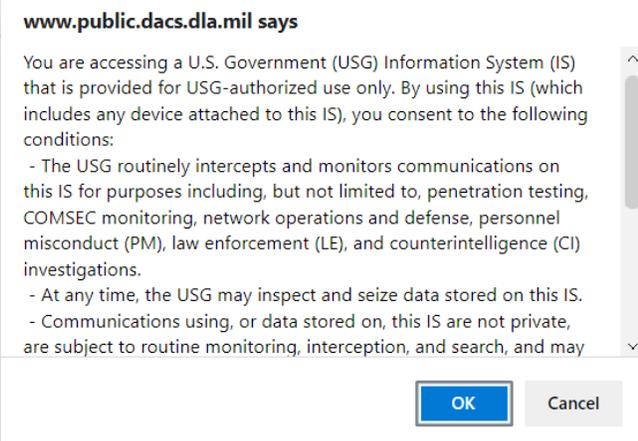
Logon Using Two Factor Authentication

Business Logic	Screenshot
<p>To sign on to PTAP GMS, start by copying and pasting the following URL into your browser: https://www.public.dacs.dla.mil/ptap/portal</p> <p>When prompted to select a certificate, click the [Cancel] button.</p>	
<p>When the login page appears:</p> <p>Enter your username and password into the fields provided.</p> <p>Click the [Sign In] button.</p>	
<p>The password used is temporary and must be changed.</p> <p>Enter password used on the previous page into the Old Password field.</p> <p>Enter a new password into the New Password field.</p> <p>Re-enter the new password into the Confirm Password field.</p> <p>Click the [Change] button.</p>	

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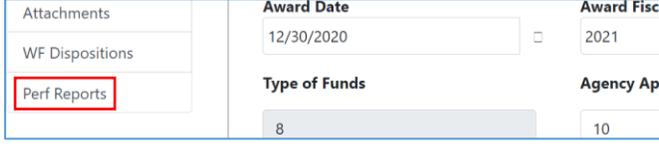
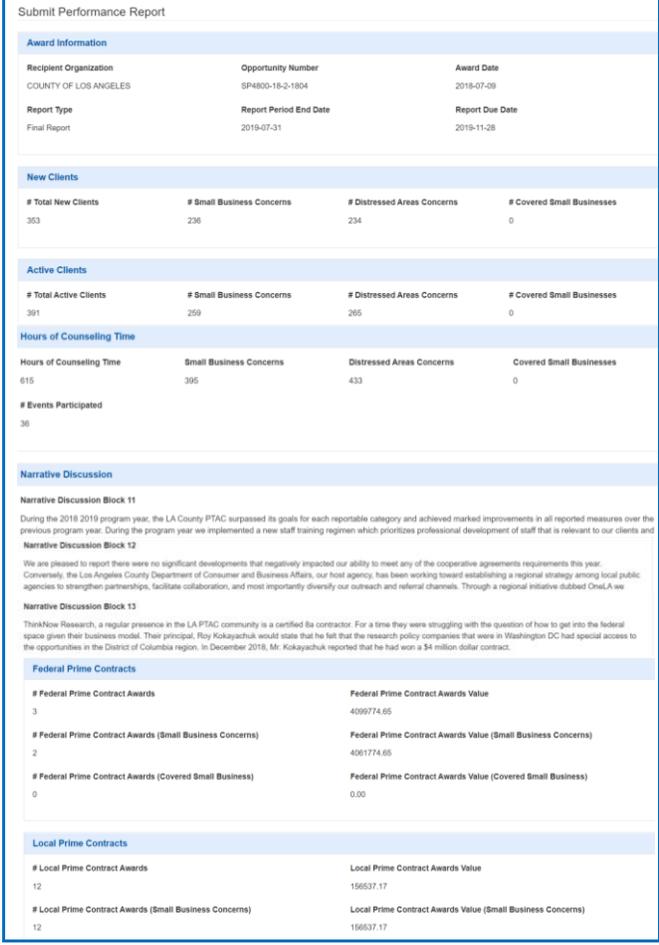
Business Logic	Screenshot
<p>When the login page appears:</p> <p>Enter your username and new password into the fields provided.</p> <p>Click the [Sign In] button.</p>	
<p>** This page only appears when your mobile device has not be associated with your PTAP account **</p> <p>When the Secret Key is displayed:</p> <ol style="list-style-type: none">1. Open the <i>authenticator app</i>.2. Point the camera at the Secret Key.3. Enter the number that is shown on the <i>authenticator app</i>.	
<p>** This page appears when mobile device and PTAP account are synced **</p> <ol style="list-style-type: none">1. Open the <i>authenticator app</i> on your mobile device.2. Enter the number that is shown on the <i>authenticator app</i>.	

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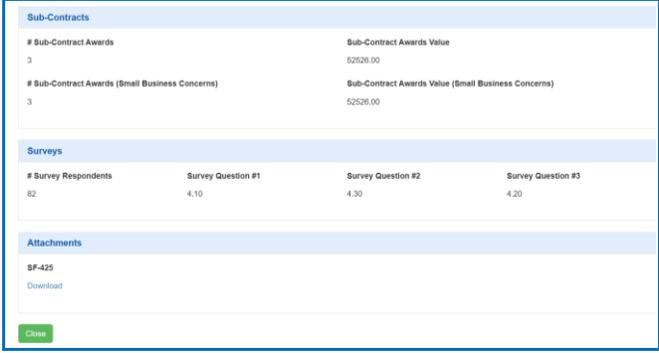
Business Logic	Screenshot																		
<p>Read the DoD attestation comments.</p> <p>Click the [OK] button to proceed.</p> <p>Click the [Cancel] button to stop.</p>																			
<p>Upon successful authentication, the Inbox tab will be presented.</p>	 <table border="1"><thead><tr><th>Task Name</th><th>Assigned</th><th>View</th></tr></thead><tbody><tr><td>Submit Performance Report - Period Ending 2020-06-30 for THDSATST</td><td>2020-07-30</td><td>View Link</td></tr><tr><td>Submit Performance Report - Period Ending 2020-09-30 for THDSATST</td><td>2020-10-30</td><td>View Link</td></tr><tr><td>Submit Performance Report - Period Ending 2021-03-31 for CDDINGREEN/M</td><td>2021-08-30</td><td>View Link</td></tr><tr><td>Submit Performance Report - Period Ending 2021-06-30 for CDDINGREEN/M</td><td>2021-11-30</td><td>View Link</td></tr><tr><td>Submit Performance Report - Period Ending 2021-12-31 for THDSATST</td><td>2021-04-30</td><td>View Link</td></tr></tbody></table>	Task Name	Assigned	View	Submit Performance Report - Period Ending 2020-06-30 for THDSATST	2020-07-30	View Link	Submit Performance Report - Period Ending 2020-09-30 for THDSATST	2020-10-30	View Link	Submit Performance Report - Period Ending 2021-03-31 for CDDINGREEN/M	2021-08-30	View Link	Submit Performance Report - Period Ending 2021-06-30 for CDDINGREEN/M	2021-11-30	View Link	Submit Performance Report - Period Ending 2021-12-31 for THDSATST	2021-04-30	View Link
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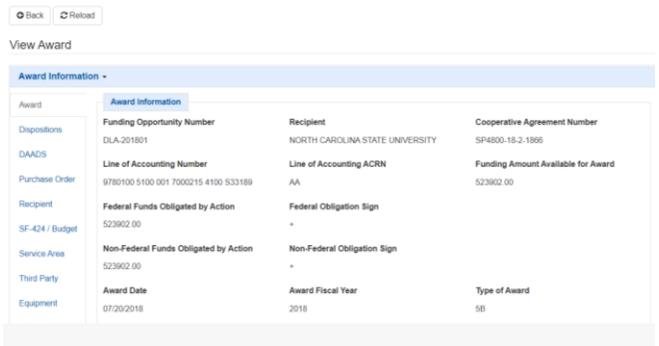
View Performance Report Submission

Business Logic	Performance Report
<p>When Awards are set to status of “Award Open,” users can review completed <i>Performance Report Submissions</i> from recipients by clicking the <u>Edit Award</u> link adjacent to the award of interest.</p>	
<p>When the link is clicked, the Edit Award page is opened.</p> <p>The user scrolls toward bottom of page and clicks the Perf Reports tab.</p>	
<p>When the tab is clicked, the Performance Report Schedule information is presented.</p> <p>When the report status of any report is “Submitted,” this column should be an active link to the Submit Performance Report page.</p>	
<p>Submit Performance Report page is a read-only view of the metrics submitted by the recipient for the adjacent report.</p> <p>The majority of the information is retrieved from the PERFORMANCE REPORT table.</p> <p>SELECT * FROM PERFORMANCE_REPORT WHERE AWARD_ID = <active award's ID></p> <p>Related information is retrieved from the following tables:</p> <ul style="list-style-type: none"> • AWARD (Award Information) • APPLICATION_ATTACHMENTS (Attachments) <p>The information is currently presented as shown in the images to the right.</p> <p>The user can scroll up and the page to see the information submitted by the recipient for chosen reporting period.</p>	

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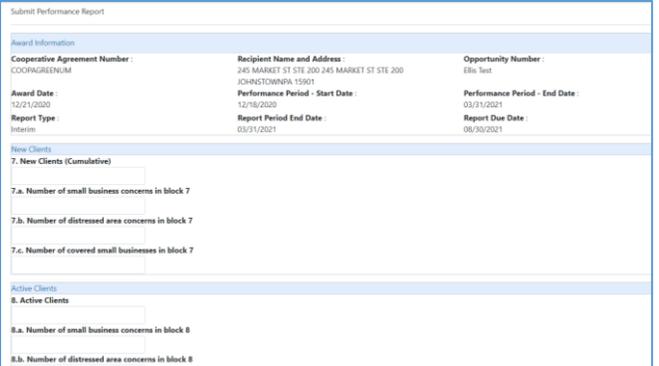
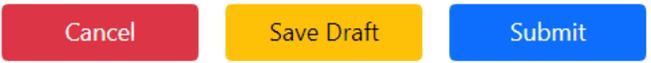
Business Logic	Performance Report
<p>The Download link in the Attachments section opens the associated SF-425 file in a separate window.</p> <p>When finished, the user can click the [Close] button to return to the previous page.</p> <p>Alternatively, the user can click the [Back] or [Cancel] button at the top of the page to return to the previous page.</p>	 <p style="text-align: center; margin-top: 10px;"> ← Back ↻ Reload </p>

External User – My Awards Tab

Business Logic	Generate Award Document																																												
<p>After logging in, click the [My Awards] tab.</p>																																													
<p>When the My Awards page appears, all of the awards granted to the active user appear in the list.</p> <p>Click the [View Award] button adjacent to any award shown.</p>	 <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th>Award ID</th> <th>Funding Opportunity Number</th> <th>Application ID</th> <th>Award Date</th> <th>Award Fiscal Year</th> <th>Award Closeout Status</th> <th>View</th> </tr> </thead> <tbody> <tr> <td>72</td> <td>DLA-201801</td> <td>258</td> <td>07/20/2018</td> <td>2018</td> <td>Award Open</td> <td>View</td> </tr> <tr> <td>170</td> <td>DLA-201801B</td> <td>361</td> <td>07/10/2019</td> <td>2019</td> <td>Award Open</td> <td>View</td> </tr> <tr> <td>266</td> <td>DLA-202001 A-B</td> <td>466</td> <td>06/26/2020</td> <td>2020</td> <td>Award Open</td> <td>View</td> </tr> </tbody> </table>	Award ID	Funding Opportunity Number	Application ID	Award Date	Award Fiscal Year	Award Closeout Status	View	72	DLA-201801	258	07/20/2018	2018	Award Open	View	170	DLA-201801B	361	07/10/2019	2019	Award Open	View	266	DLA-202001 A-B	466	06/26/2020	2020	Award Open	View																
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<p>Click on each tab of the award to review the information stored in the system.</p>	 <p style="margin-top: 5px;"> ← Back ↻ Reload </p> <p>View Award</p> <p>Award Information -</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th colspan="4">Award Information</th> </tr> </thead> <tbody> <tr> <td style="width: 25%;">Dispositions</td> <td style="width: 25%;">Funding Opportunity Number</td> <td style="width: 25%;">Recipient</td> <td style="width: 25%;">Cooperative Agreement Number</td> </tr> <tr> <td></td> <td>DLA-201801</td> <td>NORTH CAROLINA STATE UNIVERSITY</td> <td>SP4800-18-2-1896</td> </tr> <tr> <td>DAADS</td> <td>Line of Accounting Number</td> <td>Line of Accounting ACRN</td> <td>Funding Amount Available for Award</td> </tr> <tr> <td></td> <td>9780100 5100 001 7000215 4100 533189</td> <td>AA</td> <td>523902.00</td> </tr> <tr> <td>Purchase Order</td> <td>Federal Funds Obligated by Action</td> <td>Federal Obligation Sign</td> <td></td> </tr> <tr> <td></td> <td>523902.00</td> <td>+</td> <td></td> </tr> <tr> <td>Service Area</td> <td>Non-Federal Funds Obligated by Action</td> <td>Non-Federal Obligation Sign</td> <td></td> </tr> <tr> <td></td> <td>523902.00</td> <td>+</td> <td></td> </tr> <tr> <td>Third Party</td> <td>Award Date</td> <td>Award Fiscal Year</td> <td>Type of Award</td> </tr> <tr> <td></td> <td>07/20/2018</td> <td>2018</td> <td>SB</td> </tr> </tbody> </table>	Award Information				Dispositions	Funding Opportunity Number	Recipient	Cooperative Agreement Number		DLA-201801	NORTH CAROLINA STATE UNIVERSITY	SP4800-18-2-1896	DAADS	Line of Accounting Number	Line of Accounting ACRN	Funding Amount Available for Award		9780100 5100 001 7000215 4100 533189	AA	523902.00	Purchase Order	Federal Funds Obligated by Action	Federal Obligation Sign			523902.00	+		Service Area	Non-Federal Funds Obligated by Action	Non-Federal Obligation Sign			523902.00	+		Third Party	Award Date	Award Fiscal Year	Type of Award		07/20/2018	2018	SB
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External User – Inbox

Business Logic	Generate Award Document																		
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<p>When the Submit Performance Report page appears:</p> <ul style="list-style-type: none"> • Enter the performance metrics into the applicable fields on the page. • Navigate the entire page to visit all fields and ensure that all fields have been populated correctly. • Cancel, Save, or Submit when finished. 	 <p>Submit Performance Report</p> <p>Award Information</p> <table border="1"> <tr> <td>Cooperative Agreement Number : COOPINGREENUM</td> <td>Recipient Name and Address : 245 MARKET ST STE 200 245 MARKET ST STE 200 JOHNSTOWNPA 15901</td> <td>Opportunity Number : Ellis Test</td> </tr> <tr> <td>Award Date : 12/21/2020</td> <td>Performance Period - Start Date : 12/16/2020</td> <td>Performance Period - End Date : 03/31/2021</td> </tr> <tr> <td>Report Type : Interim</td> <td>Report Period End Date : 03/31/2021</td> <td>Report Due Date : 08/30/2021</td> </tr> </table> <p>New Clients</p> <p>7. New Clients (Cumulative)</p> <p>7.a. Number of small business concerns in block 7</p> <p>7.b. Number of distressed area concerns in block 7</p> <p>7.c. Number of covered small businesses in block 7</p> <p>Active Clients</p> <p>8. Active Clients</p> <p>8.a. Number of small business concerns in block 8</p> <p>8.b. Number of distressed area concerns in block 8</p>	Cooperative Agreement Number : COOPINGREENUM	Recipient Name and Address : 245 MARKET ST STE 200 245 MARKET ST STE 200 JOHNSTOWNPA 15901	Opportunity Number : Ellis Test	Award Date : 12/21/2020	Performance Period - Start Date : 12/16/2020	Performance Period - End Date : 03/31/2021	Report Type : Interim	Report Period End Date : 03/31/2021	Report Due Date : 08/30/2021									
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<p>At any time during the process of complete the performance report task, any of the following three options can be used:</p> <p>Click the [Cancel] button to discard all changes and return to the list of tasks. <i>(task will remain on the task list)</i></p> <p>Click the [Save Draft] button to save current data and return to the list of tasks. <i>(task will remain on the task list)</i></p> <p>Click the [Submit] button to save current data, submit the finalized performance report and return to the list of tasks. <i>(task will no longer show in the task list)</i></p>	 <p>Cancel Save Draft Submit</p>																		