How to Find Information in CACTAS

How do I find what I need to know?

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Using the CACTAS Search Tool

How to Access

1. Sign into CACTAS and click the CACTAS Search tab:

2. If you do not see the CACTAS Search tab, you may need to customize your search tabs. Do this by clicking the + at the end of the header of tabs.
3. In the resulting screen, click **Customize My Tabs**

4. This will bring you to a menu where you can select tabs to be added. Find **CACTAS Search** in the alphabetized **Available Tabs** list.

5. Click the **Add** button. Use the up and down arrows to change the order of your tabs.

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**Searching**

In the resulting screen, you will be able to search by Proposal number, Award number, PI name, Sponsor name, Agreement Type, Action Type, OSR Division, or RMS Team, or a combination of these. A few things to note about each of these fields:

- For **Proposal** and **Award**, you will need to search by the entire Proposal or Agreement number – the tool will not search partials (for example, you would need to type *P0025551*, not *0025551*, or *P0025* etc).
• For the Principal Investigator field, you can search by the Principal Investigator’s first name only, last name only, partial first name only, partial last name only, or entire first and last name. You can also search by a partial first and last name by adding a % sign after the first name (the “%” is acting as a wildcard). So for example, if you were looking for agreements for Michael Harrison, you could search by:
  o Michael
  o Harrison
  o Mi
  o Harr
  o Michael Harrison
  o Mi% Harr
  o You can NOT search by Mi Harrison

• The Sponsor field will autocomplete, and you will need to choose an option. For example, if you type in “kai,” you will see Henry J Kaiser Foundation, Hokkaido University, Kaiser Permanente, etc. and you will need to click on one of them to select the sponsor.

• Action Type, Agreement Type, OSR Division and RMS Team fields are dropdown picklists.

• Once you have typed in your search criteria, hit Enter to bring back the results.

Results

• Note that your search results will be in order by Agreement Name in descending order (so the highest, and therefore most recent, will be at the top).

• For performance reasons, searches will only bring the top 150 results back. So if your search criteria are non-specific, you will only see the 150 items with the highest Agreement Names — you will not get back all possible results. Therefore you may wish to narrow down your search. Note that you will see the following message in between the search criteria and results set in this scenario:

  Displaying 150+ records matching your given search criteria. Please refine the results by providing more information.

• Once you have your results, you may want to open up an agreement in a separate tab, so that you retain the results separately. (If you do not open up a separate tab, you will not be able to return to your results set.) To do this you can either right-click on the Agreement Name, and then choose “Open up in new tab,” or you can click the scroll button of your mouse (typically located in between the left and right click buttons).

• If you would like to start a new search, you can hit the Clear button to clear all previous search criteria.

NOTE: Each of these You can also view a webinar on how to search in CACTAS. There are two ways to access the webinars (after logging in to CACTAS via MyAccess):
• Follow this link: https://ucsf.my.salesforce.com/a0qA0000002LewI
  o Note: Be sure that Show Feed is enabled at the top left of your screen

OR

• Enter CA-0052730 in the main Search box at the top of the CACTAS screen

![CACTAS Screen](Image)

• Click on Search Feeds

![Search Feeds](Image)

• The Feed results will display the 3 webinars.
• We recommend viewing in the following order, from most basic to more advanced information (see screenshot, below):
  o How to Search in CACTAS
  o How to Set Up Views in CACTAS
  o How to Run Reports in CACTAS

• IMPORTANT! You will need to Click on Download mp4 to view each webinar.
Using Views

By creating your own view, you can see a list of items that are particularly relevant to you, filtered by whatever criteria you need. You can do this by copying an existing view, saving it, and then tweaking it to show agreements or other items that meet your selection criteria.
In this example, we’ll create a tailored view that displays all agreements with sponsors related to Kaiser (that have Kaiser somewhere in the Sponsor name), and that are contracts.

1. Click the Agreements tab. By default it may be displaying the “My Active Agreements” view.
2. Click the dropdown arrow next to the view name and select All and then click Go.
3. You will now see all agreements displayed. Click the Clone button.
4. This brings up the view menu. Step one is to name your view. We will call it Kaiser All.
5. Then we will filter for the information we want by clicking the dropdown arrow for **Field** under “Step 2 Specify filter criteria.”
6. This will bring up all the fields you can filter by, in alphabetical order. Scroll down and select “Sponsor.”
7. Under **Operator**, select “Contains” from the dropdown. Note that “contains” is more flexible than “equals” since “equals” demands completely accurate spelling and a full name.
8. Under **Value**, type in “Kaiser.”
9. In the next line, select “Agreement Type” under **Field**, and leave the **Operator** at “equals.”
10. You may notice a **look-up icon** appears next to the blank under **Value**. This is because Agreement Type has defined values and you must choose one of them rather than typing it in via free text. Click the Lookup and then select “Contract” and then click “Insert Selected.”
The next step is to select the fields you want to display, and put them in the order that you want them to appear on your screen. Under “Step 3 Select Fields to Display,” you can see all the fields available to display on the left. Fields that are already selected to appear on your screen are in the box on the right.

11. In this example, we want to see the RMS team assigned to the agreement. Scroll down the alphabetical list on the left and select “RMS team,” and then click the arrow pointed to the right under “Add.”

12. Then use the up and down arrows to the right of the “Selected Fields” box to move fields up and down. Here, we have moved “Status” and “RMS Team” up so that they will appear in the 3rd and 4th columns.

13. Click the Save As button.
Now you can see your view:

Note that you can create multiple views, with whatever criteria make sense to you, and they will be available the next time you log in.
Using Reports

Reports are useful for a number of reasons, such as finding information that either is not available via Views or the Search Tool, and for aggregating data that can be exported to a spreadsheet and used in Excel.

There are a number of pre-set reports available in CACTAS. You would find them by:

1. Click the Reports tab.
2. By default, the system will show you those reports you may have been using recently. To see all CACTAS pre-set reports, click the CACTAS Reports button.

Reports available include:

- Contracts by Status
- Contracts per Principal Investigator
- Contracts per Sponsor
- Contracts Turnaround Time
- My Contracts by Expiring Date
- My Contracts by Progression Dates
- My Contracts by Status
- My Pending Contracts
- My Tasks
- Tasks I’m waiting on
You can also create your own reports by customizing an existing report. If you want to create a report and share it with others to use, you would save it to the CACTAS Reports Public folder. Currently this folder has the following reports available:

- C&G Completed Matters
- C&G Pending Award Setup in RMS
- C&G Pending Matters
- DOM – SFGH Pending Awards
- MTAs by Sponsor Type

There are many reports available: reports that cover all contracts, and reports that cover contracts and tasks that are relevant to only you (which may be handy if you do not want to wade through everyone else’s contracts).

3. For any of these reports, select them by clicking on them. You will see a preview of the report in the subsequent screen. Note that because this is only a preview, it may not have all information, especially if there are many items to be included. You need to click Run Report to get the full report.

4. Note that you can export this information to an Excel spreadsheet by clicking Export Details.