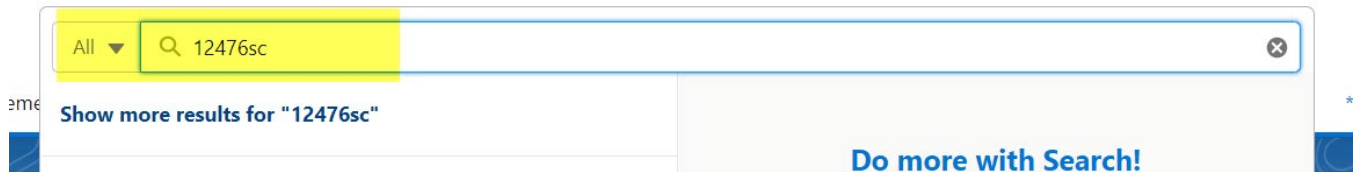


General Search Box

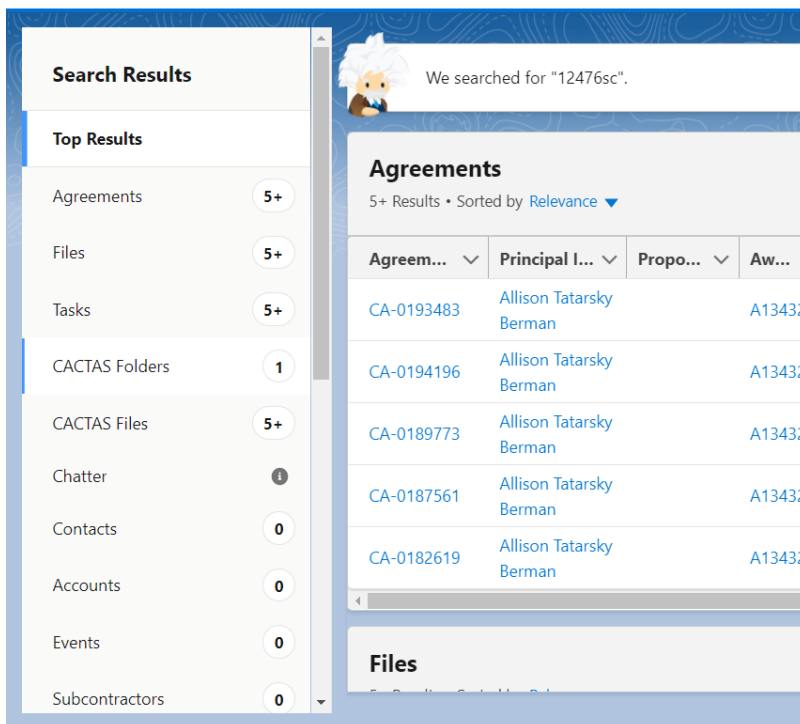
Search by SC#

If you have the SC# for the subaward/subcontract, the quickest way to search is via the General Search Box at the top of the page.

Step 1: Enter the SC# in the top search box, then press Enter or click “Show more results for XX”.



Step 2: Results will be by category. Agreements are the CACTAS records. Sort columns by clicking the column heading.



Step 3: Click on a CA# to view the CACTAS record. To view files associated with this Subaward/Subcontract, scroll down to the folder. The folder will contain **all** the files associated with the SC#, not only those related to this specific CA#.

CACTAS Home Agreements CACTAS Search CACTAS Folders Subcontractors Reports Accounts

Agreement **CA-0193483**

External Uploaded Files

CACTAS Folder **Tatarsky, Allison_A134328_12476sc** Notes Historical

File Name	Description	Keyword tag	Created Date
12476sc06 FE.pdf	[CA-0194196] FE Amendment	Fully Executed - Continuation	03/08/2022, 11:53 AM
SRF_SOW_A134328_Tatarsky, ...	[CA-0194196] SOW	Subaward Request Form	03/04/2022, 02:18 PM
SRF_BUD_A134328_Tatarsky, ...	[CA-0194196] Budget	Subaward Request Form	03/04/2022, 02:18 PM
SRF_A134328_Tatarsky, A_HF...	[CA-0194196] SRF	Subaward Request Form	03/04/2022, 02:18 PM
12476sc05 FE.pdf	[CA-0193483] FE Amendment	Fully Executed - Continuation	03/04/2022, 10:50 AM
SRF_SOW_A134328_Tatarsky, ...	[CA-0193483] SOW	Subaward Request Form	02/23/2022, 12:33 PM
SRF_BUD_A134328_Tatarsky, ...	[CA-0193483] Budget	Subaward Request Form	02/23/2022, 12:33 PM
SRF_A134328_Tatarsky, A_HF...	[CA-0193483] SRF	Subaward Request Form	02/23/2022, 12:32 PM
12476sc04 FE.pdf	[CA-0189773] FE Amendment	Fully Executed - Continuation	12/20/2021, 12:45 PM

Step 4: To view or download a file, click on the down arrow on the far right.

Agreement **CA-0193483**

External Uploaded Files

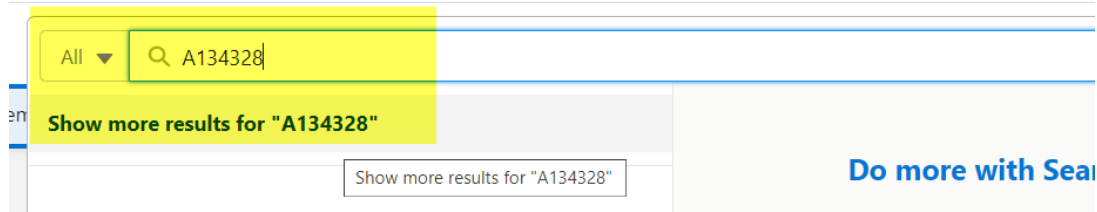
CACTAS Folder **Tatarsky, Allison_A134328_12476sc** Notes Historical

File Name	Description	Keyword tag	Created Date
12476sc06 FE.pdf	[CA-0194196] FE Amendment	Fully Executed - Continuation	03/08/2022, 11:53 AM
SRF_SOW_A134328_Tatarsky, ...	[CA-0194196] SOW	Subaward Request Form	03/04/2022, 02:18 PM
SRF_BUD_A134328_Tatarsky, ...	[CA-0194196] Budget	Subaward Request Form	03/04/2022, 02:18 PM
SRF_A134328_Tatarsky, A_HF...	[CA-0194196] SRF	Subaward Request Form	03/04/2022, 02:18 PM

Search By A#

The general search box is also useful if you have the A# and want to view a list of all the subs associated with this A#.

Step 1: Enter the A# into the top search box and hit enter or click on “Show more results for XX”.



Step 2: Results will be categorized.

- a. Most of the agreements listed will be related to the UCSF Award, not to the subcontract/subaward. When searching, the most helpful category is “CACTAS Folders.” This will show the list of all folders related to the A#. Each subcontract/subaward will have its own CACTAS folder. The description provides the subrecipient name and the Sub PI's last name.

The screenshot shows a table titled 'CACTAS Folders' with 7 results. The table has two columns: 'CACTAS Folder Name' and 'Description'. The results are as follows:

CACTAS Folder Name	Description
Tatarsky, Allison_A134328_12003sc	Sub_U Notre Dame_Lobo
Tatarsky, Allison_A134328_AFRIMS CRADA	Sub_AFRIMS_Ponlawat
Tatarsky, Allison_A134328_12000sc	Sub_SWISSTROP_Moore
Tatarsky Berman, Allison_A134328	IVCC
Tatarsky, Allison_A134328_12476sc	Sub_Health Forefront Org_Doum

- b. Click on a folder name to view all agreements (CACTAS records) and files associated with the subcontract/sub award. FILES CANNOT BE DOWNLOADED OR VIEWED FROM THIS VIEW. You must go to CA# and view/download files as described above.

The screenshot shows two sections: 'Agreements (6+)' and 'CACTAS Files (6+)'. The 'Agreements' section has a table with columns: Agreement Name, Award, Proposal, and Project Title. The 'CACTAS Files' section has a table with columns: CACTAS File Name, File Name, Keyword Tag, and Description.

Agreement Name	Award	Proposal	Project Title
CA-0194196	A134328		
CA-0193483	A134328		
CA-0189773	A134328		
CA-0187561	A134328		
CA-0182619	A134328		
CA-0173377	A134328		

CACTAS File Name	File Name	Keyword Tag	Description
F-0263219	12476sc00 FE.pdf	Fully Executed - New Agreement	[CA-0168422] New agreement

CACTAS Search Tab

The CACTAS search tab can be used to search one or more of the following categories: SC#, A#, Subcontract Status, PI, Sub PI, Sponsor, Subcontractor, and Subcontract Action Type.

1. Go to the CACTAS Search Tab and change the **Search for:** dropdown to “Outgoing Subcontract Agreements” (Subcontract record type).

2. Start typing in any of the search boxes, and results will appear. You can narrow search results by using multiple filters.
3. Sort results by clicking the top of each column.

The screenshot shows the CACTAS search interface. At the top, there is a search bar and navigation tabs including Home, Agreements, CACTAS Search, CACTAS Folders, Subcontractors, Reports, Accounts, Service Agreements, Dashboards, and More. Below the navigation is a search filter section with a dropdown menu set to "Outgoing Subcontract Agreements (Subcontract record type)". There are several input fields for Subcontract No., Award, Subcontract Status (set to "--None--"), Principal Investigator (set to "Tatarsky"), Sub PI, Sponsor, Subcontractor Name, and Subcontract Action Type (set to "--None--"). Below the filters, it says "Displaying 34 records matching your given search criteria." A table of results is shown with columns: Agreement, Subcontract..., Award, Subcontract..., Principal In..., Sub PI, Sponsor, Subcontractor Name, Subcontract..., and Subcontract. The table contains 5 rows of data.

	Agreement ↑	Subcontract...	Award	Subcontract...	Principal In...	Sub PI	Sponsor	Subcontractor Name	Subcontract...	Subcontract
1	CA-0156320	12003sc	A134328	Completed	Allison Tatarsky B...	Dr. Neil Lobo	Innovative Vector...	University of Notre Dame	New	0
2	CA-0156473	12007sc	A134328	Completed	Allison Tatarsky B...	Theeraphap Char...	Innovative Vector...	Kasetsart University	New	
3	CA-0157760	12060sc	A134328	Completed	Allison Tatarsky B...	Dr. Alongkot Ponl...	Innovative Vector...	Armed Forces Rsch Inst of...	New	
4	CA-0168422	12476sc	A134328	Completed	Allison Tatarsky B...	Dyna Doum	Innovative Vector...	Health Forefront Organiz...	New	
5	CA-0168908	12007sc	A134328	Completed	Allison Tatarsky B...	Theeraphap Char...	Innovative Vector...	Kasetsart University	Amendment	1

Creating a View for Subawards/Subcontracts

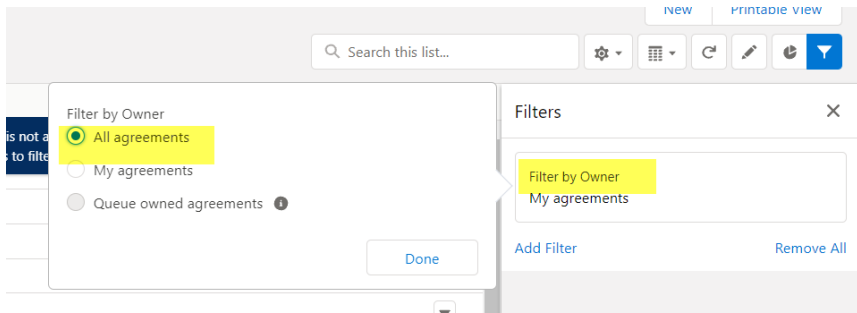
Views are useful for monitoring status and tracking workloads based on team, department, or OSR staff.

1. On the Agreement page, select “New” underneath the List View Controls dropdown.

The screenshot shows a search bar with the text "Search this list...". To the right of the search bar is a gear icon for settings, a list view icon, and a refresh icon. Below the search bar is a table with columns: Agreement Type, Status, LIST VIEW CONTROLS, and First Rec. The LIST VIEW CONTROLS dropdown menu is open, showing options for "New" and "Clone".

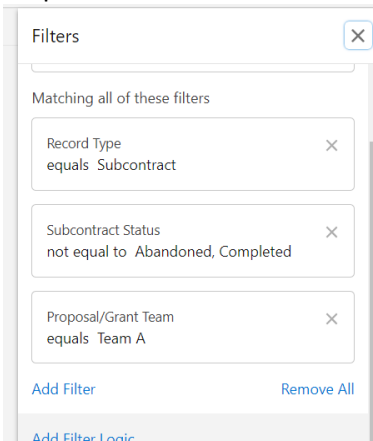
Agreement Type	Status	LIST VIEW CONTROLS	First Rec
v	Pre-Negotiated	New	9/17/202
v	Completed	Clone	12/9/201

2. Create a List Name and select Save. The only option available is “Only I can see this list view”. The options to share list views are greyed out for all users.
3. In the right-side column, update Filter by Owner to “All Agreements.”



To add new filters, select the field from the top dropdown box. Select Operation and then Value, and click Save.

To have only subcontract/subaward, filter by “Record Type” and select Subcontract. The filters listed will include all fields in the Subcontract, C&G, and ICD record types. Most of the Subcontract fields start with “Sub” or “Subcontract.” Please review a subcontract record to see the current fields and the correct field names. Here is a screenshot with example fields to track open Subaward/Subcontract for the Proposal and Grants Team A.



- To control the results that are displayed, select “Select Fields to Display” from the List View Control dropdown.

