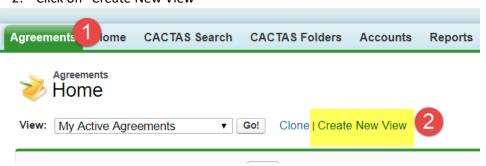# Creating CACTAS Views – For Subcontracts

CACTAS views allows the user to filter CACTAS records by any CACTAS field, and to select the fields to be displayed in the results. Below are instructions for two example views that will display "Sub-out" records, either for a given Principal Investigator or for a Subrecipient/Subcontractor. The results will provide the older record format, and the new record format launched in December 2019.
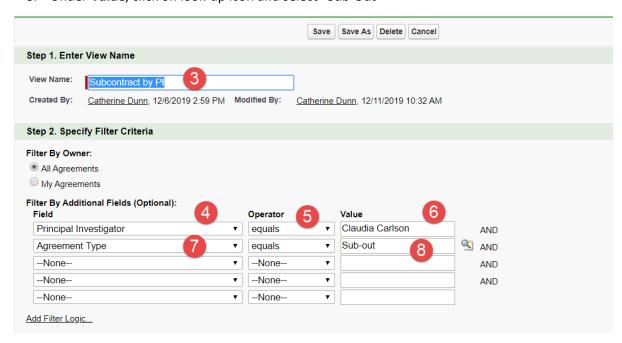
CACTAS View – Subcontracts for a given Principal Investigator
CACTAS View – Subcontracts for a given Subrecipient/Subcontractor

CACTAS View – Subcontracts for a given Principal Investigator
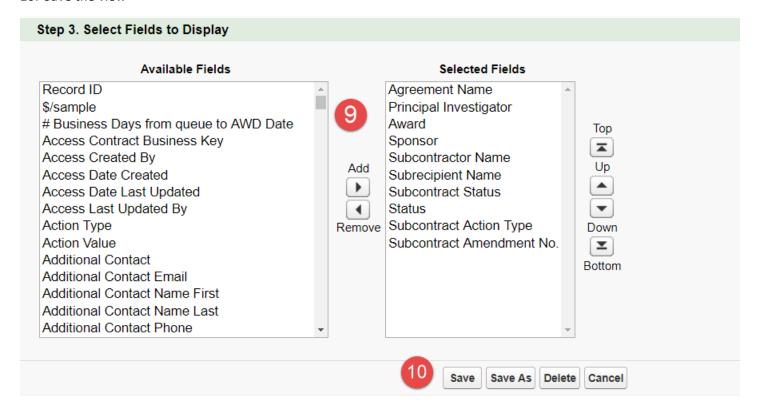
1. Click on Agreements tab.
2. Click on "Create New View"

3. Name your view
4. Select Filter Criteria: Click the dropdown arrow for **Field** under "Step 2 Specify filter criteria". This will bring up all the fields you can filter by. Scroll down and select "Principal Investigator"
5. Under **Operator,** select "equals"
6. Under **Value,** type in PI Name. Please note the name must match how the name appears in CACTAS.
7. In the next line, select "Agreement Type" under **Field** and leave **Operator** at "equals"
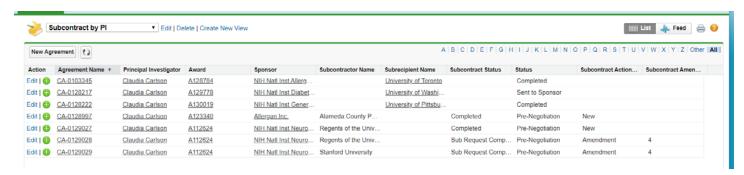8. Under **Value**, click on look-up icon and select "Sub-Out"

9. 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.
   a. "Subcontractor Name"- will provide the name of the Subcontract entity for the new record type
   b. "Subrecipient Name" – will provide the name of the Subcontract entity for older records
   c. "Subcontract Status" – will provide the status for records for the new record type
   d. "Status" - will provide the status for older records. For new records, the status will always be Pre-Negotiation
10. Save the view

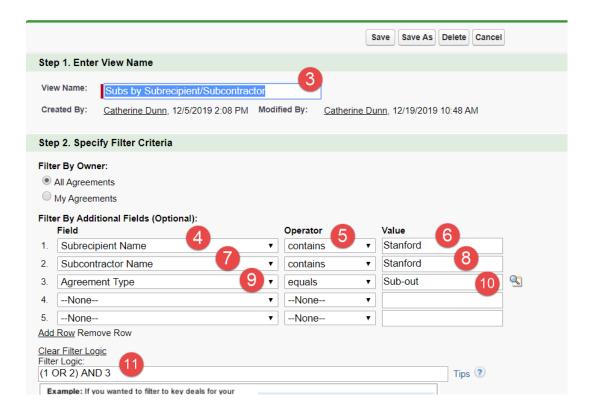11. Resulting View:

Click on CA number to view the record.

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 in the dropdown list on the Agreements Tab. Select "Go" to view the results. For example, "Project PI (if different)" is a field that can be added to reflect multi-PI projects.

CACTAS View – Subcontracts for a given Subrecipient/Subcontractor
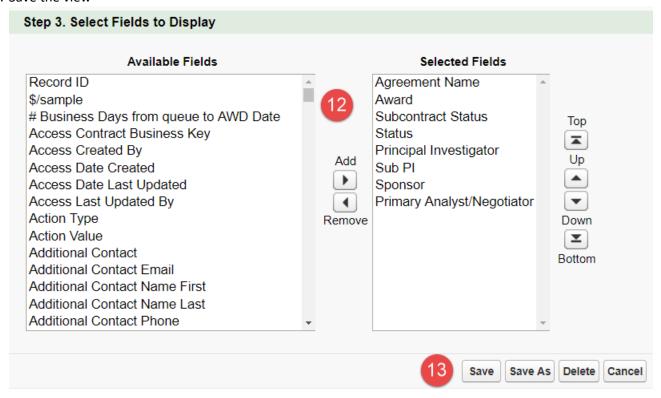
1. Click on Agreements tab.
2. Click on "Create New View"

3. Name your view
4. Select Filter Criteria: Click the dropdown arrow for **Field** under "Step 2 Specify filter criteria". This will bring up all the fields you can filter by. Scroll down and select "Subrecipient"
5. Under **Operator,** select "contains"
6. Under **Value,** type in the name of the Subcontract entity (e.g. Stanford). Please note the name must match how the name appears in CACTAS. By select "contains" as operator, you do not have to provide complete name.
7. In the next line, select "Subcontractor Name" under **Field** and under **Operator** select "contains"
8. Under **Value,** type in the same Subcontract entity as step 6 (e.g. Stanford).
9. In the third line, select "Agreement Type" under **Field** and leave **Operator** at "equals"
10. Under **Value**, click on look-up icon and select "Sub-Out"
11. Click on "Add Filter Logic". Change Filter Logic to (1 OR 2) AND 3

12. 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.
    a. "Subcontract Status" – will provide the status for records for the new record type
    b. "Status" - will provide the status for older records. For new records, the status will always be Pre-Negotiation
    c. "Principal Investigator" – UCSF PI, this will display for both record types
    d. "Sub PI" – PI at the Subcontractor, this will only display for the new record type
    e. "Sponsor" – The sponsor will display for both record types
    f. "Primary Analyst/Negotiator"- The OSR staff member (e.g. RMS Associate or Subcontract Team Officer) currently assigned the subcontract, this will display for both record types

13. Save the view

Step 3. Select Fields to Display

Available Fields	Selected Fields
Record ID	Agreement Name
$/sample	Award
# Business Days from queue to AWD Date	Subcontract Status
Access Contract Business Key	Status
Access Created By	Principal Investigator
Access Date Created	Sub PI
Access Date Last Updated	Sponsor
Access Last Updated By	Primary Analyst/Negotiator
Action Type	
Action Value	
Additional Contact	
Additional Contact Email	
Additional Contact Name First	
Additional Contact Name Last	
Additional Contact Phone	

12 Add ▶ ◀ Remove

Top ⤒ Up ▲ Down ▼ Bottom ⤓

13 Save | Save As | Delete | Cancel

14. Resulting View

Action	Agreement Na...	Agreement Type	Subcontract Status	Status	Principal Investigator	Sub PI	Sponsor	Primary Analyst/Negotiator
Edit | ⊕	CA-0129036	Sub-out	Initiated	Pre-Negotiation	R.Adams Dudley	Marsha Williams	NIH Natl Cancer Institute	Dayana Daniel Hernandez
Edit | ⊕	CA-0129034	Sub-out	Initiated	Pre-Negotiation	Colin Ohrt	Terry Lu	DOD Naval Health Researc...	Jean Jones
Edit | ⊕	CA-0129033	Sub-out	Initiated	Pre-Negotiation	Wendell Lim	Bonnie Halpern-Felsher	NIH Natl Inst General Medi...	Farzana Hossain
Edit | ⊕	CA-0129029	Sub-out	Sub Request Co...	Pre-Negotiation	Claudia Carlson	Mary Long	NIH Natl Inst Neurological ...	Catherine Dunn
Edit | ⊕	CA-0128128	Sub-out		Sent to Spon...	Wallace Marshall		National Science Foundation	Susan Hughes
Edit | ⊕	CA-0128126	Sub-out		Sent to Spon...	Wallace Marshall		National Science Foundation	Susan Hughes

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 in the dropdown list on the Agreements Tab. Select "Go" to view the results. For example, "Project PI (if different)" is a field that can be added to reflect multi-PI projects.