

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”

Agreements Home CACTAS Search CACTAS Folders Accounts Reports

Agreements Home

View: My Active Agreements Go! Clone 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”

Save Save As Delete Cancel

Step 1. Enter View Name

View Name: Subcontract by PI

Created By: Catherine Dunn, 12/6/2019 2:59 PM Modified By: Catherine Dunn, 12/11/2019 10:32 AM

Step 2. Specify Filter Criteria

Filter By Owner:

All Agreements
 My Agreements

Filter By Additional Fields (Optional):

Field	Operator	Value	
Principal Investigator	equals	Claudia Carlson	AND
Agreement Type	equals	Sub-out	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

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

Step 3. Select Fields to Display

Available Fields

- Record ID
- \$/sample
- # Business Days from queue to AWD Date
- Access Contract Business Key
- Access Created By
- Access Date Created
- Access Date Last Updated
- Access Last Updated By
- Action Type
- Action Value
- Additional Contact
- Additional Contact Email
- Additional Contact Name First
- Additional Contact Name Last
- Additional Contact Phone

Selected Fields

- Agreement Name
- Principal Investigator
- Award
- Sponsor
- Subcontractor Name
- Subrecipient Name
- Subcontract Status
- Status
- Subcontract Action Type
- Subcontract Amendment No.

9

Add ▶ Remove ◀

10

Save Save As Delete Cancel

11. Resulting View:

Subcontract by PI List Feed

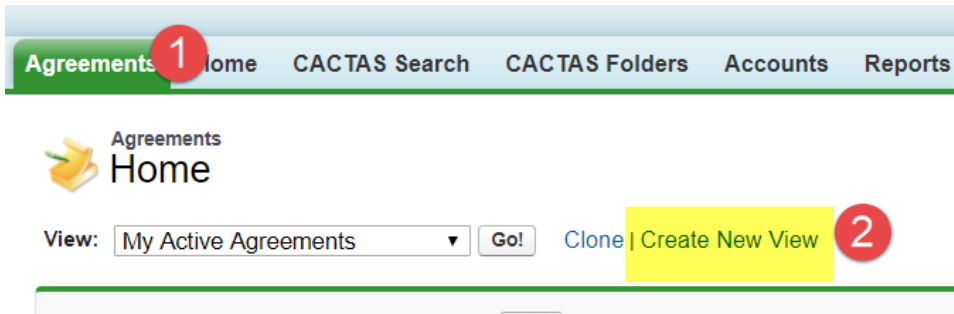
Action	Agreement Name	Principal Investigator	Award	Sponsor	Subcontractor Name	Subrecipient Name	Subcontract Status	Status	Subcontract Action...	Subcontract Amen...
Edit	CA-0103345	Claudia Carlson	A128784	NIH Natl Inst Allerg...		University of Toronto		Completed		
Edit	CA-0128217	Claudia Carlson	A129778	NIH Natl Inst Diabet...		University of Washi...		Sent to Sponsor		
Edit	CA-0128222	Claudia Carlson	A130019	NIH Natl Inst Gener...		University of Pittsbu...		Completed		
Edit	CA-0128997	Claudia Carlson	A123340	Allergan Inc.	Alameda County P...		Completed	Pre-Negotiation	New	
Edit	CA-0129027	Claudia Carlson	A112624	NIH Natl Inst Neuro...	Regents of the Univ...		Completed	Pre-Negotiation	New	
Edit	CA-0129028	Claudia Carlson	A112624	NIH Natl Inst Neuro...	Regents of the Univ...		Sub Request Comp...	Pre-Negotiation	Amendment	4
Edit	CA-0129029	Claudia Carlson	A112624	NIH Natl Inst Neuro...	Stanford University		Sub Request Comp...	Pre-Negotiation	Amendment	4

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

The screenshot shows the 'Create New View' form. At the top right are buttons for 'Save', 'Save As', 'Delete', and 'Cancel'. The form is divided into two main sections: 'Step 1. Enter View Name' and 'Step 2. Specify Filter Criteria'.

Step 1. Enter View Name

View Name: (marked with a red circle 3)

Created By: Catherine Dunn, 12/5/2019 2:08 PM Modified By: Catherine Dunn, 12/19/2019 10:48 AM

Step 2. Specify Filter Criteria

Filter By Owner:

All Agreements
 My Agreements

Filter By Additional Fields (Optional):

	Field	Operator	Value
1.	<input type="text" value="Subrecipient Name"/> (4)	<input type="text" value="contains"/> (5)	<input type="text" value="Stanford"/> (6)
2.	<input type="text" value="Subcontractor Name"/> (7)	<input type="text" value="contains"/>	<input type="text" value="Stanford"/> (8)
3.	<input type="text" value="Agreement Type"/> (9)	<input type="text" value="equals"/>	<input type="text" value="Sub-out"/> (10)
4.	<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>
5.	<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>

[Add Row](#) [Remove Row](#)

[Clear Filter Logic](#)

Filter Logic: (11) [Tips ?](#)

Example: If you wanted to filter to key deals for your

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

- Record ID
- \$/sample
- # Business Days from queue to AWD Date
- Access Contract Business Key
- Access Created By
- Access Date Created
- Access Date Last Updated
- Access Last Updated By
- Action Type
- Action Value
- Additional Contact
- Additional Contact Email
- Additional Contact Name First
- Additional Contact Name Last
- Additional Contact Phone

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Add

Remove

Selected Fields

- Agreement Name
- Award
- Subcontract Status
- Status
- Principal Investigator
- Sub PI
- Sponsor
- Primary Analyst/Negotiator

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

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