CACTAS Release Notes – May 11th 2023

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## PI View Access

Principal Investigator (PI) have view access to their own records.

1. When a PI is added to the Principal Investigator field, that individual will automatically be given read-only access in CACTAS. Their access will be restricted to only those records where they are listed as the PI.

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## Additional Ways to View/Download Files

There are three ways to View/Download Fields

1. **Agreement Page**
   1. Click on the Downward arrow button on the far right under the External Uploaded Files section

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1. **File Page**
   1. To access the file page, click on the file name on the Agreement page under the External Uploaded Files

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* 1. On the file page, click on “Download Latest”

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1. **Folder Page**
2. To access the folder page, either:
   * 1. Click on the folder name on the Agreement page under the External Uploaded Files

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* + 1. Click on folder name from a search result

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1. On the Folder page, click on the Downward arrow button on the far right under the External Uploaded Files section

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## Updates to the Folder Page

New details have been added to the Agreement list view on the Folder Page

1. Columns added: Action Type, Status, Subcontract Status and Created Date

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## New Task List on Home Page

A default view of pending task displays on the home page. Click on More for full task list and more details.

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## Email Displayed when Searching Contacts

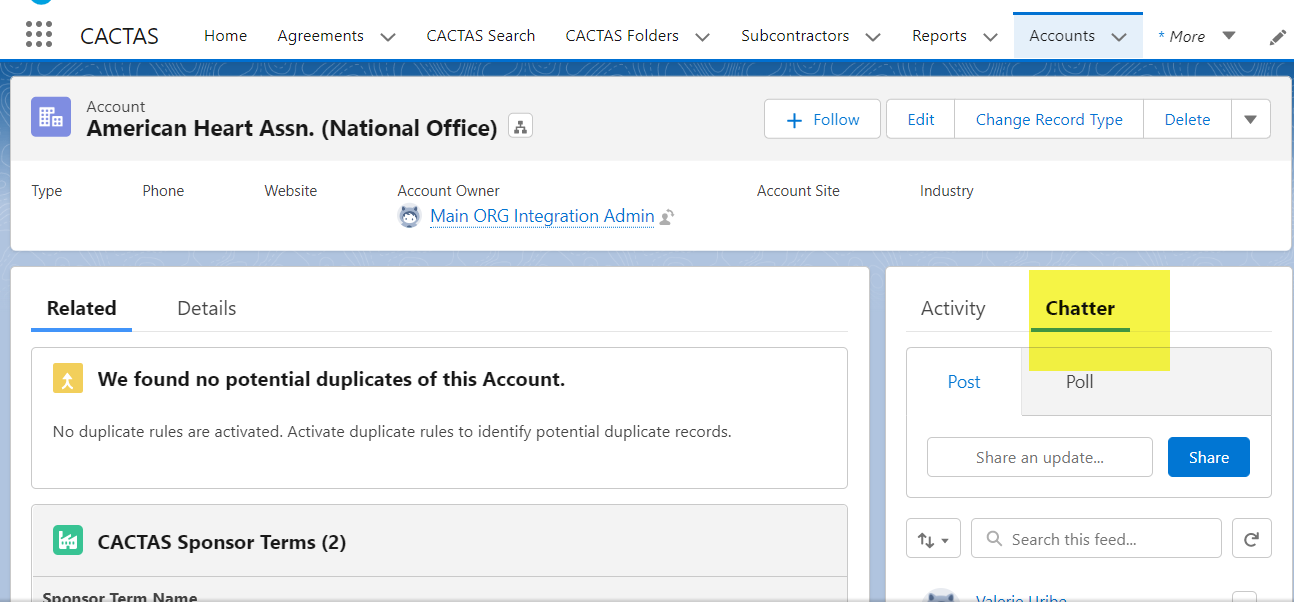
When searching for a contact, email address will show under the name to allow for distinguishing between individuals with identical names.

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## Sponsor (Accounts) Page Updates

1. The CACTAS Feed (Chatter Tab) will appear as default in the right corner of the Sponsor (Accounts) Page



## Hover Text Updates

1. Sponsor Code Appear when hover of Sponsor in agreement

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1. Employee ID for all People/Contact fields

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## Add Title in the Search Display Results

Project Title has been added as a column in the display results when using the CACTAS Search tab

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## Expanded Notes Field on Agreement Page

Expand Space for notes fields – can be expanded down but not out – Is this even possible?

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## Intake Form Changes

Renamed the Budget form names to Budget-Internal and Budget-Sponsor and removed Proposed Project Budget

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## Updates to Subaward Agreement Record

**Information Section:**

1. Update “Department Contact” to “Financial Contact”
2. Text box “Additional UCSF Contacts” under Department Contact
3. Text box “Additional Sub Contacts” under Sub Contact Email

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## Updates to Subcontractor Page

**Subcontractor Profile Section**

1. “Additional Sites” text box under “Sub Website”

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1. “Common Name” text box under “Legal Name”

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