



What Researchers Need to Know
about Maestro

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2 INTRODUCTION

Welcome to the TAMUS Research Management Information System, Maestro.

Maestro is a web browser-based application that consists of several modules. The system is designed to support researchers and research administration across The Texas A&M University System (TAMUS). The information in Maestro is based upon data feeds from the FAMIS and EPIK databases.

Maestro provides researchers and research administrators with timely and accurate information needed to manage research activities and to establish collaborations.

Researchers can:

- View research account balances and detailed transactions
- Create, edit, and view proposals
- View active project information and project negotiation status
- Complete Conflict of Interest disclosures
- Add research keywords to personal profile
- Search for people with a specific area of interest
- Search for inventory
- Search for funding opportunities
- Search all awards

2.1 MAESTRO – USER ACCESS

Access the system by logging onto the Maestro homepage at <https://maestro.tamus.edu> with Single Sign-On (SSO) UIN and password.

- User accounts are automatically setup for researchers once they are added to a financial account in FAMIS, a proposal in Maestro, or a project in Maestro.
- Researcher Reviewers (business administrators, research administrators or other staff assisting researchers) must request an account.
- Contact the agency’s Maestro user account administrator to submit an online user account request for processing (see ‘Contact Us’ screen below). Also listed are trainers for your campus.

Campus	Trainer/User Administrator	Member Contact	Phone	Email
AgriLife	Both	Tribbie Sandner	979-458-4383	tdsandner@ag.tamu.edu
PVAMU	Both	Lois Burg	936-261-1927	lwburg@pvamu.edu
TAMHSC	Both	Pam Knight	979-436-0588	pknight@tamhsc.edu
	User Admin	Elise Winchester	979-436-0590	winchester@tamhsc.edu
TAMIU	Both	Ann Frey	956-326-3024	afrey@tamiu.edu
TAMU	Both	Amanda Reitmayer	979-458-8538	areitmayer@tamu.edu
	User Admin	Sharon Thigpin	979-862-7833	sthigpin@tamu.edu
TAMUC	Both	Tamela Kimbro	903-468-3277	tamela.kimbrow@tamuc.edu
TAMUCC	Both	Sharmeen Ahmed	361-825-2886	sharmeen.ahmed@tamucc.edu
TAMUK	Both	Angela Bingham	361-593-4764	angela.wyro@tamuk.edu
	Both	Cynthia Villarreal	361-593-4915	cynthia.m.villarreal@tamuk.edu
	Both	Diana Luna	361-593-3480	diana.p.luna@tamuk.edu
TAMUS - SAGO	Trainer	Jarrett Eisenrich	979-458-6017	j-eisenrich@tamus.edu
	User Admin	Brenda Schroeder	979-845-6689	bschroeder@tamus.edu
TAMUS - SRS	User Admin	Brenda Schroeder	979-845-6689	bschroeder@tamus.edu
	User Admin	Charlotte Salas	979-458-2050	cesalas@tamu.edu
TAMUSA	Both	Sandra Arispe	210-784-1106	sjarispe@tamusa.tamus.edu
	Both	Lisa Pena	210-784-1108	lpena@tamusa.tamus.edu
TAMUT	Trainer	Bill McHenry	903-223-3015	william.mchenry@tamut.edu
Tarleton	Trainer	Roger Wittie	254-968-1993	wittie@tarleton.edu
	Trainer	Crissa Nugen	254-968-9588	cnugen@tarleton.edu
	User Admin	Linda Sanders	254-968-0526	sanders@tarleton.edu
TEES	Trainer	Katina Anderson	979-845-9777	katinaanderson@tamu.edu
	User Admin	Cheryl Malone	979-458-7734	cheryl-malone@tamu.edu
TFS	Both	Tribbie Sandner	979-458-4383	tdsandner@ag.tamu.edu
TTI	Both	Mary Levien	979-458-1679	m-levien@tamu.edu
	User Admin	Jane Zhou	979-845-7983	janezhou@tamu.edu
WTAMU	Trainer	Dona Deotte	806-651-2982	ddeotte@wtamu.edu
	User Admin	Steve McLean	806-651-2983	smclean@wtamu.edu
	User Admin	Heather Taylor	806-651-2981	hjtaylor@wtamu.edu


2.2 FEEDBACK

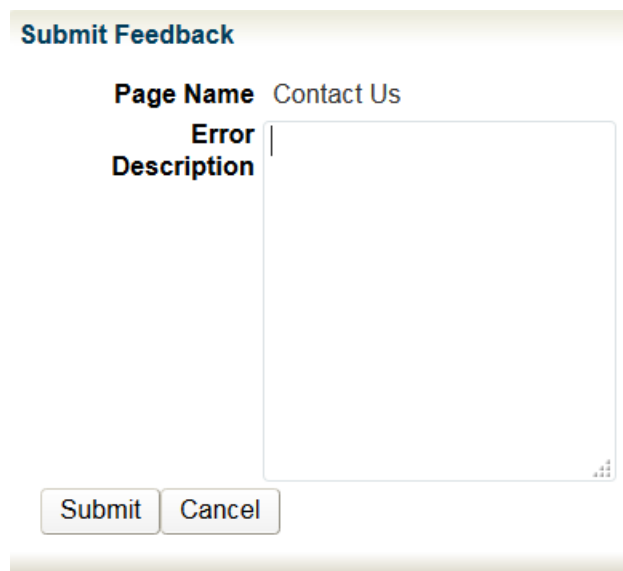
Feedback provides a way for users to:

Submit suggestions or report problems with the functionality of the system:

- Report problems with the functionality of the system
- Share suggestions to improve the system

To initiate and submit feedback:

1. Click the **Feedback** button ( Feedback) on the blue bar near the upper right-hand corner of the screen. The screen below is displayed:



Submit Feedback

Page Name Contact Us

Error Description

Submit Cancel

2. Or, send an email to maestro@tamu.edu .
3. Users will be contacted individually. If the answer is useful for the other users, we publish it and it can be found on the Feedback search screen that is accessible by everybody navigating to Home->Search->Feedback Search.

3 SCREEN ELEMENTS DEFINED

Role Icons

Left Menu

Search Options

Action/Icon Toolbar
Query by Example

Query Results

- Role Icons – User role determines which icons are visible
- Feedback provides a way for users to
 - Report problems with the system functionality
 - Share suggestions to improve the system
- Left Menu
- Search Options
- Action/Icon Toolbar

Revision Date: 11/29/2016

Note:

- Researchers have automatic access to all of their accounts if they are listed as responsible person on the account.

4.1.2 ACCOUNT INFORMATION

Account Information [Account List](#) [Account Balance](#)

Search Accounts

* Account Number: * Member:

220160-00000 Nsf Erc
 Sponsor: Not Sponsored
 Primary PI:

Funding Period 01-Mar-2013 to 31-Aug-2016	Project 0000000000 -
Setup Date 01-Mar-2013	Current Funds Yes
Administrator Edwards, Ronald 9794587439 r-edwards1@tamu.edu	Gift Fee Exempt No
Sponsor Not Sponsored	Bottom Line Budget Control Yes
Funding Type	FAMIS ABR Rule 001
F & A Cost Method - 0%	Budget Sort -
Effort DRES - Direct - Organized Research	NACUBO Function 15 - Research
Status Active	Member TEES

This screen displays all the attributes of the selected account. Data is fed from data warehouse and it represents one day old information. Screen can be accessed from Current Account List or a direct menu click.

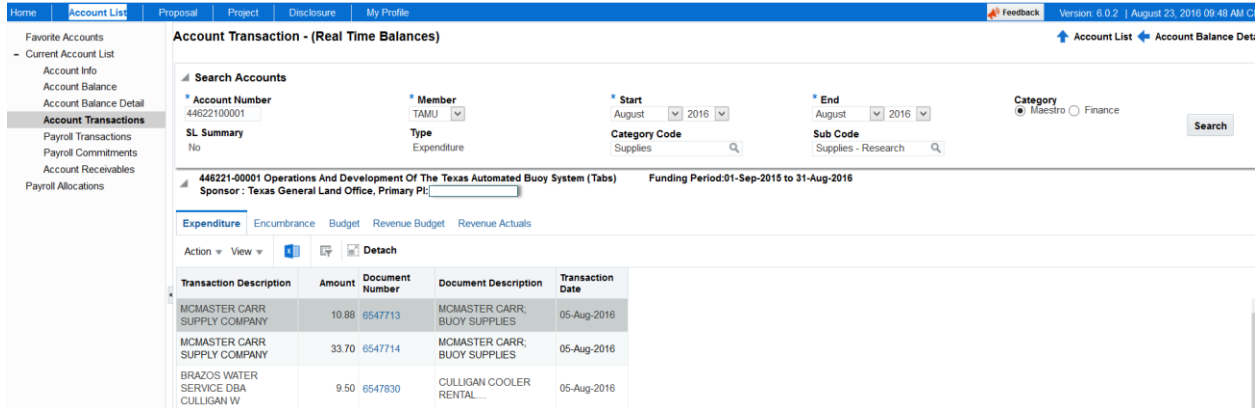
4.1.4 ACCOUNT BALANCE DETAIL

The screenshot shows the 'Account Balance Detail' page. The left sidebar contains a navigation menu with options like 'Favorite Accounts', 'Current Account List', 'Account Info', 'Account Balance', 'Account Balance Detail' (selected), 'Account Transactions', 'Payroll Transactions', 'Payroll Commitments', 'Account Receivables', and 'Payroll Allocations'. The main content area has a search bar with fields for 'Account Number' (40414370000), 'Member' (TAMU), 'Start' (August 2014), 'End' (August 2016), 'SL Summary' (No), 'Type' (Expenditure), and 'Category Code'. Below the search bar, it displays '404143-70000 Noaa' and 'Sponsor: DOC-National Oceanic and Atmospheric Administration, Primary PI:'. A table of expenditure details is shown below:

Subcode	Subcode Title	Finance Category	Expenditure
4010	Supplies - Office General	Supplies And Materials ...	0.00
4013	Supplies - Research	Supplies And Materials ...	595.95
4014	Supplies - Other (Incl Ammunition)	Supplies And Materials ...	0.00
4030	Fuels And Lubricants - Other	Supplies And Materials ...	0.00
4040	Chemicals & Gases	Supplies And Materials ...	0.00
4045	Medical Supplies	Supplies And Materials ...	0.00
4055	Farm, Ranch And Nursery Suppl...	Supplies And Materials ...	0.00
4075	Shop And Industrial Supplies	Supplies And Materials ...	0.00
4076	Building Supplies And Materials	Supplies And Materials ...	155.20

This screen displays expense details by sub category on the selected category type and category code. Screens can be accessed from Account Balance screen or a direct menu click. If title says (Real Time Balance) then the balances displayed are real time from FAMIS.

4.1.5 ACCOUNT TRANSACTION – (REAL TIME BALANCES)



Screen is designed to display expenditure, encumbrance, budget, revenue budget, and revenue actual transactions. To display transaction details click on the respective tab. Encumbrances for only non-payroll items are displayed, except for TAMRF. Screen can be accessed by drilling down from Account Balance Detail screen or a direct menu click. If title says (Real Time Balance), then the balances displayed are real time from FAMIS.

For expense document(s), click on:

- PO Reference number link opens the purchasing document report for FAMIS accounts
- Document number link opens the voucher data form for FAMIS accounts
- For TEES accounts with activity before September 1, 2015, the PO Reference number link displays purchase requisition or travel requisition based on the expense and image related to the transaction.
- For TEES accounts with activity before September 1, 2015, the Document Number link displays purchase voucher or travel voucher based on the expense and image related to the transaction.

For encumbrance document:

- Document number link displays purchase document report for FAMIS accounts
- Document number link displays purchase requisition for TEES accounts with activity before September 1, 2015 and image related to the transaction

4.1.6 PAYROLL TRANSACTIONS

The screenshot shows the 'Payroll Transaction' screen. At the top, there is a navigation bar with 'Home', 'Account List', 'Proposal', 'Project', 'Disclosure', and 'My Profile'. Below this is a sidebar menu with options like 'Favorite Accounts', 'Current Account List', 'Account Info', 'Account Balance', 'Account Balance Detail', 'Account Transactions', 'Payroll Transactions', 'Payroll Commitments', 'Account Receivables', and 'Payroll Allocations'. The main content area has a search bar with fields for 'Account Number' (44622100001), 'Member' (TAMU), 'Start' (August 2015), 'End' (August 2016), and 'Sub Code'. Below the search bar, the transaction details are shown for '446221-00001 Operations And Development Of The Texas Automated Buoy System (Tabs)' with a funding period of '01-Sep-2015 to 31-Aug-2016'. A table of transactions is displayed with the following data:

Name	PIN	% Effort	Sub Code	Pay Voucher	Amount	Transaction Date	Pay Period End	Pay Check Date
1520 - Fica Contributions (Oasi Matching)		100	0004148	0004148	69.19	09-Oct-2015	30-Sep-2015	09-Oct-2015
1950 - Unemployment Compensation Insurance		100	0004148	0004148	0.16	09-Oct-2015	30-Sep-2015	09-Oct-2015
1960 - Trs Matching Contribution		100	0004148	0004148	87.24	09-Oct-2015	30-Sep-2015	09-Oct-2015
1515 - Sal-Support Staff - Classified		100	0004148	0004148	182.20	09-Oct-2015	30-Sep-2015	09-Oct-2015
1951 - Lump Sum Assessment		100	0004148	0004148	12.96	09-Oct-2015	30-Sep-2015	09-Oct-2015
1910 - Employee Insurance Payments		100	0004148	0004148	2.64	09-Oct-2015	30-Sep-2015	09-Oct-2015

This screen displays detail payroll transaction at individual position pin level. No web services involved. Navigation to this screen is only through direct menu access.

4.1.7 PAYROLL COMMITMENTS

Payroll Commitment - (Real Time Balances)

Search Accounts

Account Number: 44622100001 | SL Summary: No | Member: TAMU | Start: August 2015 | End: August 2016 | PIN: [] | Search

446221-00001 Operations And Development Of The Texas Automated Buoy System (Tabs) | Funding Period: 01-Sep-2015 to 31-Aug-2016

Sponsor: Texas General Land Office, Primary PH: []

Position	Name	Budget / Wage	Salary Amount	Longevity Amount	Benefit Amount
M16120	[]	B	0.00	0.00	0.00
M16213	[]	B	1,327.27	85.00	379.70
M19051	[]	B	0.00	0.00	0.00
M20950	[]	B	1,625.22	15.00	300.85
M21804	[]	B	1,851.80	0.00	275.44

The purpose of this screen is to show payroll encumbrance details. Commitments are shown only by invoking web services for FAMIS accounts (TAMRF, TTI excluded). Navigation to this screen is available from Account Balance screen when drill down on payroll encumbrances or through direct menu access.

4.1.8 PAYROLL ALLOCATIONS

First Name	Last Name	System Member	Account	Account Title	PIN	Effort (%)	Working Months Remaining	Monthly Pay	Pay Remaining	Longevity Remaining	Benefits Remaining
		TAMU	46227305001	Col: Gulf Of Mexico Integrated Spill Response Consortium-Dimarco/guinasso		10%	0	243.84	0	0	0
		TAMU	44622100001	Operations And Development Of The Texas Automated Buoy System (Tabs)		85%	0.86	2072.63	1802.29	0	282.95
		TAMU	44622100001	Operations And Development Of The Texas Automated Buoy System (Tabs)		10%	0	243.84	0	0	0

The purpose of this screen is to provide the account owners with information about projected payroll yet to be paid. The data for this screen comes from BPP Active Budget. The active budget is scanned for currently active and future iterations for a single fiscal year. A line is written to the extract file for each Source line on the iteration that is active now or in the future.

Calculations are done in the extract file to estimate the amount of projected payroll “yet to be paid” for the fiscal year. There are also calculations to estimate the benefits remaining to be paid as well. These calculations also calculate the pay periods remaining in the fiscal year.

Navigation to this screen is only through direct menu access.

4.2 HOW DO I CREATE, APPROVE OR VIEW PROPOSALS

4.2.1 CURRENT PROPOSAL LIST

Proposal	PI	PA	Sponsor	Total Amount	Lead Organization	Title	Revision
1803997		Katerina Pinchuk	Texas General Land Office	70,000.00	TAMU Geochemical & Environ...	Supplement: Operations and Development of the Texas Automate...	
1601145		Katerina Pinchuk	Ocean University of China	925,582.00	TAMU Geochemical & Environ...	Fabrication of a 2.60 Meter Discus Buoy, Training and Deploymen...	
1507043		Stephanie Towns	Texas General Land Office	1,399,566.00	TAMU Geochemical & Environ...	Operations and Development of the Texas Automated Buoy Syste...	

This screen allows researchers to search for proposals or create official proposals (blank or copy). Search results are filtered based on security settings and only displays proposals that the current user has access to.

The current user must be one of the following cases:

1. Is Principal Investigator (PI) of the proposal.
2. Has “Researcher Administrative Assistant” role and is designated as PI delegate in PI’s “My Settings”.
3. Has “Researcher Reviewer” role and is granted access to the proposal’s lead organization/center/admin organization or its ancestor organization.
4. Has “Research Reviewer” role and is granted access to PI of the proposal.

4.2.2 PROPOSAL COMPLIANCES

Proposal compliance items that need to be completed will appear in the Principal Investigator’s To-Do listing on the home page.

The screenshot shows the Maestro Project home page. At the top is a navigation bar with links: Home, My Worklist, Search, My Settings, Contact Us, About Maestro, Reports, Feedback, and Version: 5.0.3. Below the navigation bar are three main sections: 'Documents For Approval' (9 items), 'Tasks' (2 items), and 'To-Do' (9 items). The 'To-Do' list includes: 4 Proposal Compliance, 5 Proposal Reporting Code, 0 Project Deliverable, and 0 Project Compliance. A red arrow points to the 'Proposal Compliance' item. To the right is a 'Research News' section with several news items. At the bottom is a 'Researcher' section with icons for Account List, Proposal, Project, Financial Disclosure, and Profile.

Click the ‘Proposal Compliance’ hyperlink to navigate to your work list to view the associated items that need completion. Click the description hyperlink to open the proposal compliance screen.

The screenshot shows the 'My Work List' page. At the top is a navigation bar with links: Current Items, Completed Items, and Notifications. Below the navigation bar is a 'Proposal Compliances' section. The proposal details are: Proposal (1606638), Sponsor: National Institutes of Health, PI: Tye Rougas, Status: In Development, Type: New, Title: TAMU-TAMU Bridges to the Doctorate Program - testing duplicating. Below the proposal details is a 'Compliance Items' section with a table:

Compliance Item	Value	Required Additional Data	Documents
Human Subjects	<input type="radio"/> Yes <input type="radio"/> No		0
Protected Health Information	<input type="radio"/> Yes <input type="radio"/> No		0
Human Embryonic Stem Cells	<input type="radio"/> Yes <input type="radio"/> No		0
Animals (Vertebrates)	<input type="radio"/> Yes <input type="radio"/> No	Edit	0
Recombinant DNA and Transgenic Organisms	<input type="radio"/> Yes <input type="radio"/> No		0


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The “Compliance Items List” lists all compliance items that must be designated as either being applicable or not-applicable to the proposal. The default value for each item is null.

The “Value” column contains a Yes/No Radio Button which is used to indicate either:

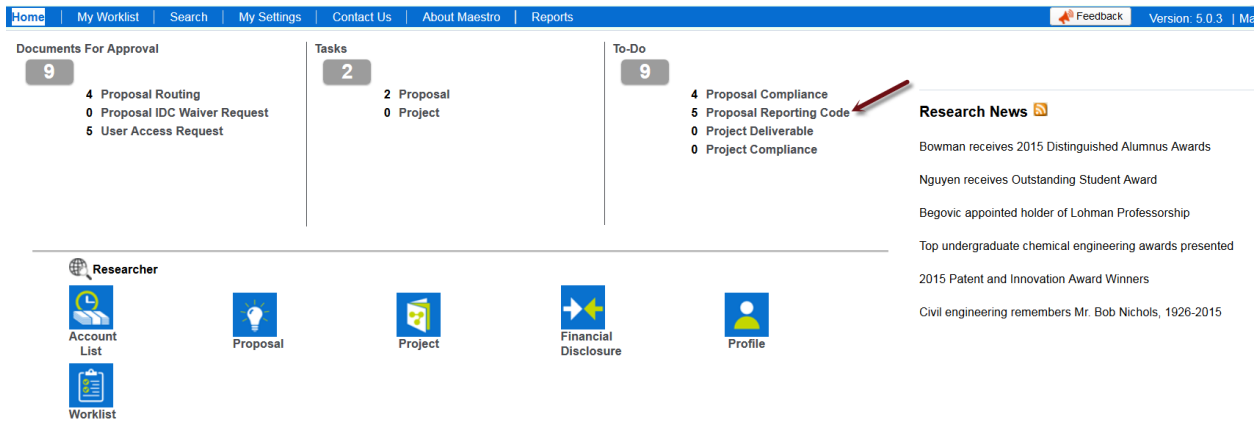
- Yes – this compliance item applies to this proposal
- No – this compliance items does not apply to this proposal

The required additional data button is enabled whenever you select Yes for a compliance item that needs additional information entered. For example, if you select Yes for item “Animals (Vertebrates)”, the Edit button will become enabled.

Click the complete  Complete icon when done to remove the item from the home page To-Do list.

4.2.3 PROPOSAL REPORTING CODE

Proposal reporting codes that need to be completed will appear in the Principal Investigator’s To-Do listing on the home page.



Click the ‘Proposal Reporting Code’ hyperlink to navigate to your work list to view the associated items that need completion. Click the description hyperlink to open the proposal reporting code screen.

This screen is used by Proposal Administrators and Principal Investigators to maintain National Science Foundation (NSF) and Texas Higher Education Coordinating Board (THECB) reporting code data.

Research and development (R&D) is creative work conducted systematically to increase the stock of knowledge (research) and to use this stock of knowledge to devise new applications (development).

1. Research is systematic study directed toward fuller scientific knowledge or understanding of the subject studied.
2. Development is systematic use of knowledge or understanding gained from research, directed toward the production of useful materials, devices, systems, or methods including design and development of prototypes and processes.

Research and Development (R&D) also includes activities involving the training of individuals in research techniques where such activities utilize the same facilities as other research and development activities and where such activities are not included in the instruction function.

Activities that do not meet the definition of R&D may include:


- a) instructional activities that are part of the institution's instruction program;
- b) public service and extension services for the benefit of groups external to the institution – grants for non-instructional public service activities established as the result of cooperative extension efforts; public broadcasting services. Texas A&M AgriLife Extension proposals are considered "other sponsored activities."
- c) student services – grants to support student activities, cultural events, student publications, admissions office, registrar's office, student financial aid administration, student health service;
- d) scholarships and fellowships – awards for students (This does not include faculty fellowships or research fellowships awarded to graduate students – they should be coded as "research.");
- e) operations and maintenance – grants for capital projects such as the airport, facilities, construction projects

The THECB Character of Work section covers three activities defined below—basic research, applied research, and development.

- a) 4A = Basic research is undertaken primarily to acquire new knowledge without any particular application or use in mind.
- b) 4B = Applied research is conducted to gain the knowledge or understanding to meet a specific, recognized need.
- c) 4C = Development is the systematic use of the knowledge or understanding gained from research directed toward the production of useful materials, devices, systems, or methods, including the design and development of prototypes and processes.

The THECB Selection Process covers two areas defined below – peer reviewed and other.

- a) 5A = COMPETITIVE, PEER-REVIEWED – Proposal is submitted to sponsor and will be competitively reviewed and evaluated with other submissions before an award is made.
- b) 5B = NEGOTIATED OR OTHER – Funding or contract has been awarded to PI without competitive submission of proposal and review by the sponsor.

Click the complete icon  Complete when done to remove the item from the home page To-Do list.

4.2.4 APPROVING PROPOSALS

Proposals awaiting approval will appear in the Principal Investigator's Documents For Approval listing on the home page.

The screenshot displays the Maestro Project web interface. At the top is a navigation bar with links: Home, My Worklist, Search, My Settings, Contact Us, About Maestro, Reports, Feedback, and Version: 5.0.3. Below the navigation bar are three summary cards:

- Documents For Approval:** 9 total items. A red arrow points to '4 Proposal Routing'. Other items include '0 Proposal IDC Waiver Request' and '5 User Access Request'.
- Tasks:** 2 total items. Includes '2 Proposal' and '0 Project'.
- To-Do:** 9 total items. Includes '4 Proposal Compliance', '5 Proposal Reporting Code', '0 Project Deliverable', and '0 Project Compliance'.

Below these cards is a 'Researcher' section with icons for Account List, Proposal, Project, Financial Disclosure, and Profile. A 'Worklist' icon is also present. On the right side, there is a 'Research News' section with several news items, including 'Bowman receives 2015 Distinguished Alumnus Awards' and 'Civil engineering remembers Mr. Bob Nichols, 1926-2015'.

Click the 'Proposal Routing' hyperlink to navigate to your work list to view the associated proposals that need approval. Click the description hyperlink to open the proposal review screen. Review the proposal information by scrolling down to view each section of information.

General Info

Displays proposal general information including:

- Title
- Sponsor
- Principal Investigator
- Lead Organization
- Administrative Organization
- Project Begin and End Dates
- Total amount requested
- Indirect Cost Information
- Checkbox indicators to denote if Cost Sharing, Budget Split, IDC Waiver, Compliance Issue, Conflict of Interest, or Subrecipient items exists on the proposal
- Proposal Administrator contact information

Personnel

Displays proposal personnel such as Principal Investigators, Co-Investigators, Other Personnel, etc.

FCOI Status

Displays financial conflict of interest information for applicable proposal personnel.

Compliance

Revision Date: 11/29/2016

Displays any compliance items associated with the proposal.

Routing Package

Hover your mouse over the Document and click the document name to open the routing package.

IDC Waiver Request

Displays IDC Waiver information such as Sponsor, IDC rate allowed, IDC rate requested, etc. if applicable. *Note that this menu item only appears if there is an IDC waiver request associated with the proposal*

Budget Split

Displays budget split among System Member and Department if applicable. *Note that this menu item only appears if there is a budget split associated with the proposal.*

Cost Sharing

Displays cost sharing information if applicable. *Note that this menu item only appears if there is cost sharing associated with the proposal.*

Subrecipient

Displays subrecipient information if applicable. *Note that this menu item only appears if there are one or more subrecipients associated with the proposal.*

Reporting Code

Displays NSF and THECB reporting information.

Routing History

Displays routing history information. Click on Routing Status hyperlink to see more information for a particular route.

Notes

Display all notes associated with the proposal. Any user who has security access to the proposal may create a note. Notes are viewable by all users who have view security access to the proposal.

Routing Action

This is where the routing approver approves the proposal by clicking on the Approve icon located on the bottom left of the screen.

4.3 HOW DO I VIEW PROJECTS AND UPLOAD PROJECT DELIVERABLES

4.3.1 VIEWING ACTIVE PROJECTS

Maestro Id	Project Role	Project Status	Title	Sponsor	Lead Organization	Researcher	Negotiator	Administrator	Project Begin Date	Project End Date
M1602432	PI	Active	CAPSTONE: ...	Tracker Marine...	Texas A&M Uni...	Tye Rougas	Autumn Biggers	Joseph Musoba	15-Apr-2016	31-Aug-2016

This screen shows researchers all of their active projects, regardless of who is the administering organization.

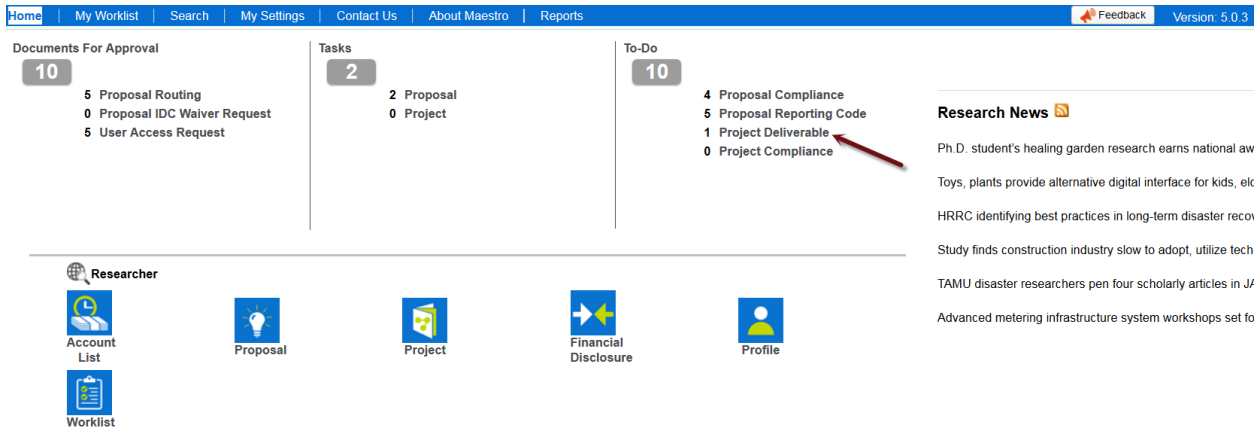
4.3.2 VIEWING PROJECTS IN NEGOTIATION

Maestro Id	Project Role	Sponsor	Lead Organization	Negotiator	Negotiation Status	Negotiation Status Date	Administrator	Project Begin Date	Project End Date
M1602774	PI	3M Foundation	Research Information Syste...		Agreement Lo...	18-Jul-2016		29-Jul-2016	29-Jul-2017

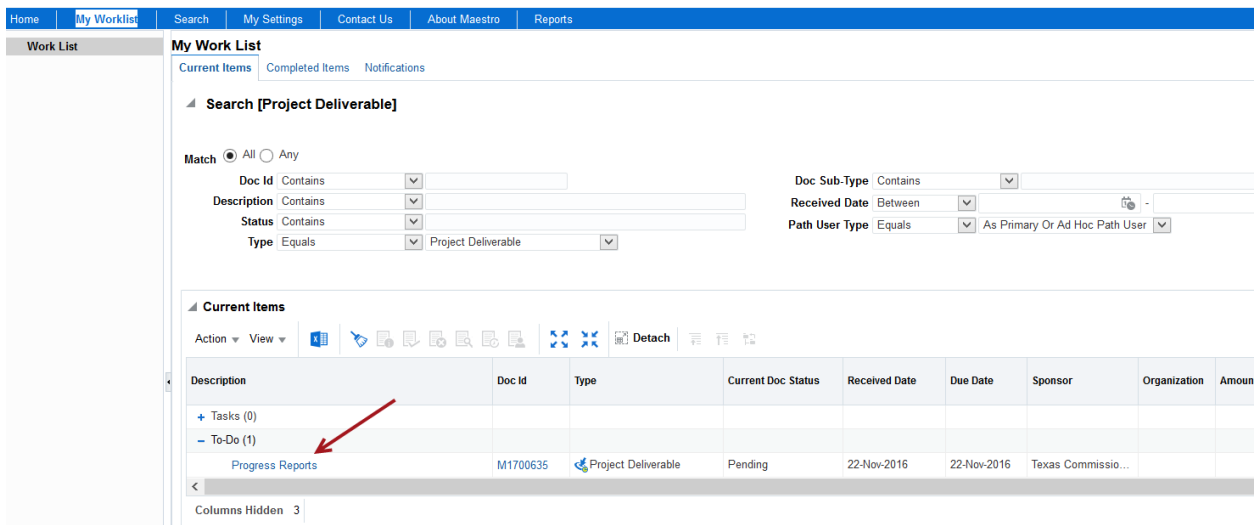
This screen shows researchers all of their projects in negotiation (all projects with a status of not 'Fully Executed'), regardless of who is the administering organization.


4.4 UPLOADING PROJECT DELIVERABLE

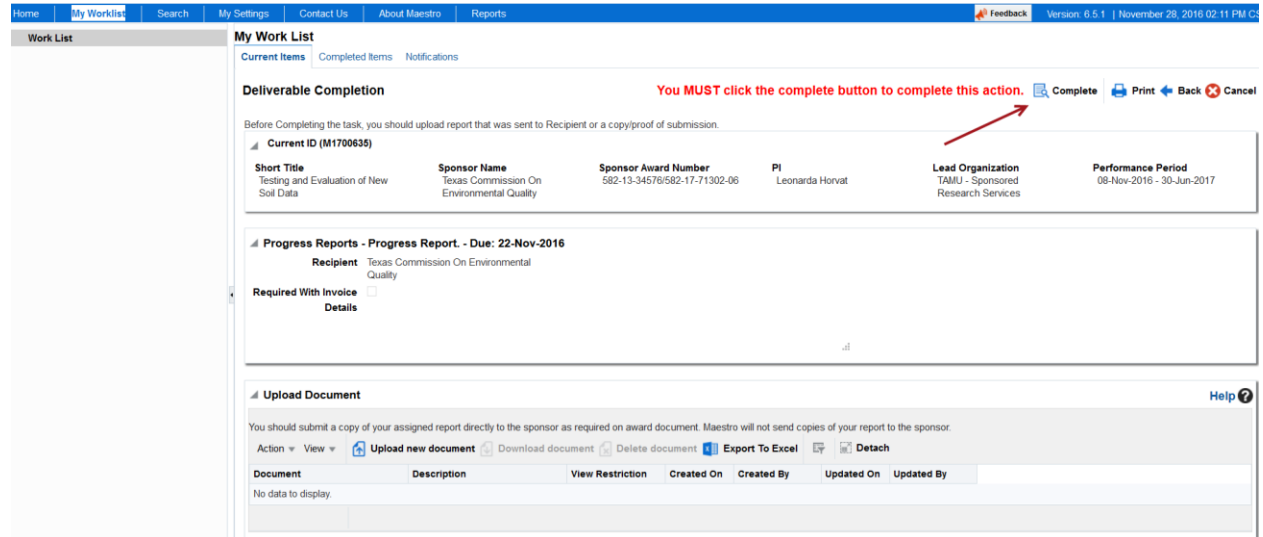
Project deliverables that need to be completed in the next two weeks will appear in the Principal Investigator’s To-Do listing on the home page.



Click the ‘Project Deliverable’ hyperlink to navigate to your work list to view the associated deliverables that need to be completed. Click the description hyperlink to open the deliverable details screen.

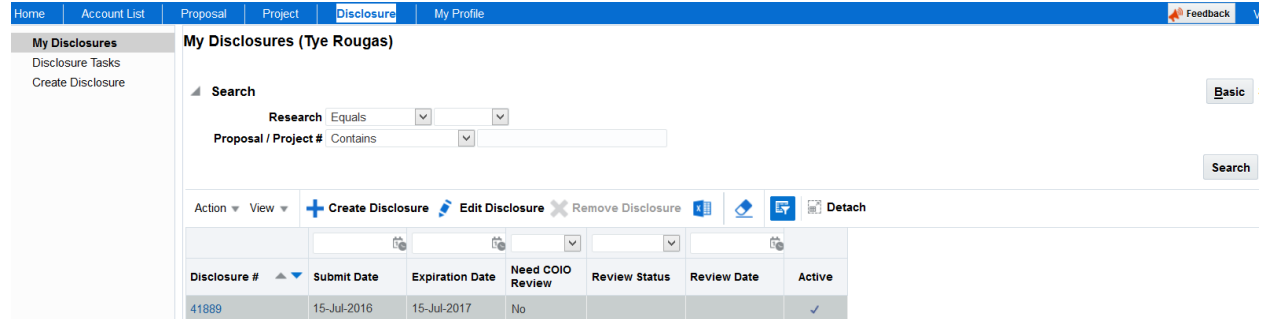


Review the information pertaining to the deliverable and upload any documents as appropriate via the Upload Document>Action>Upload new document section of the screen. Change Status to ‘Complete’ by clicking the  Complete icon.



The screenshot shows the 'My Work List' interface. At the top, there are navigation tabs: Home, My Worklist, Search, My Settings, Contact Us, About Maestro, and Reports. The main content area is titled 'My Work List' and has sub-tabs for 'Current Items', 'Completed Items', and 'Notifications'. Under 'Current Items', there is a section for 'Deliverable Completion' with a red text instruction: 'You MUST click the complete button to complete this action.' A red arrow points to the 'Complete' button. Below this, there is a table with columns: Short Title, Sponsor Name, Sponsor Award Number, PI, Lead Organization, and Performance Period. The table contains one row of data. Below the table, there is a section for 'Progress Reports - Progress Report - Due: 22-Nov-2016' with a 'Recipient' field. At the bottom, there is an 'Upload Document' section with a table for document uploads. The table has columns: Document, Description, View Restriction, Created On, Created By, Updated On, and Updated By. The table is currently empty.

4.5 SUBMITTING FINANCIAL CONFLICT OF INTEREST DISCLOSURES



The screenshot shows the 'My Disclosures' interface. At the top, there are navigation tabs: Home, Account List, Proposal, Project, Disclosure, and My Profile. The main content area is titled 'My Disclosures (Tye Rougas)'. There is a search section with dropdown menus for 'Research' (set to 'Equals') and 'Proposal / Project #' (set to 'Contains'). Below the search section, there are action buttons: '+ Create Disclosure', 'Edit Disclosure', 'Remove Disclosure', and 'Detach'. At the bottom, there is a table with columns: Disclosure #, Submit Date, Expiration Date, Need COIO Review, Review Status, Review Date, and Active. The table contains one row of data.

Disclosure #	Submit Date	Expiration Date	Need COIO Review	Review Status	Review Date	Active
41889	15-Jul-2016	15-Jul-2017	No			✓

This screen is used by Researchers to update submit/renew annual disclosures or to update an existing disclosure.

My Disclosures

This screen lists both current active disclosures as well as all previously disclosures completed.

Disclosure Tasks

This screen lists all disclosure tasks assigned. There are two types of tasks:

- “Annual” - Assigned by the system when the current user does not have an annual disclosure. For example, new PI, or when the current user’s annual disclosure has expired or will expire

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within 3 months. In the former case, the action column shows “Submit Disclosure”. In the latter case, it will be “Renew Disclosure”.

- “Update” - Assigned by the Conflict of Interest Official (COIO) when COIO reviews potential Financial Conflict of Interest (FCOI) and determines that the researcher needs to renew his/her disclosure.

Create Disclosure

This screen is used to create a disclosure. If the researcher already has a disclosure created, it will open the existing disclosure for editing. If none exists, a new disclosure will be created

Definitions

“Significant Financial Interest”

For purposes of the required disclosures, a Significant Financial Interest (SFI) is anything of monetary value (e.g., stocks, bonds, ownership interest), held or received by the Investigator or a Covered Family Member during the preceding 12 months if the aggregate value of the item(s) held or received exceeds \$5,000.

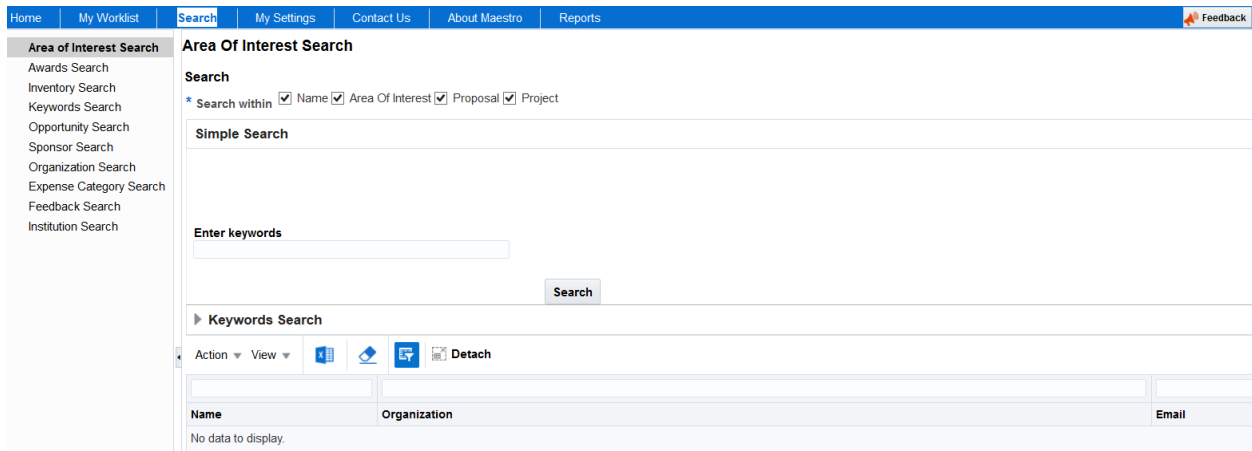
Examples of an SFI include: stock; stock options; bonds; other equity or ownership interests; consulting fees; honoraria; paid authorships; intellectual property; royalty interests; sponsored travel (unless such travel is reimbursed by a local, state or federal government agency or an institution of higher education); gifts in excess of \$250, including multiple gifts from one entity that total \$250 or more; and any fiduciary position in a for-profit or non-profit entity held by an Investigator or Covered Family Member.

An SFI does NOT include: the salary you receive from a member of The Texas A&M University System; any intellectual property rights assigned to a member of the A&M System and agreements to share in royalties related to such rights; income received from investment vehicles such as mutual funds or retirement accounts (unless the Investigator or Covered Family Member directly controls the investment decisions made in these vehicles); income from service on an advisory committee or review panel for a local, state or federal government agency or an institution of higher education; or sponsored travel if sponsored or reimbursed by a local, state or federal government agency or an institution of higher education.

5 SEARCH

5.1 FIND COLLABORATORS

5.1.1 AREA OF INTEREST SEARCH



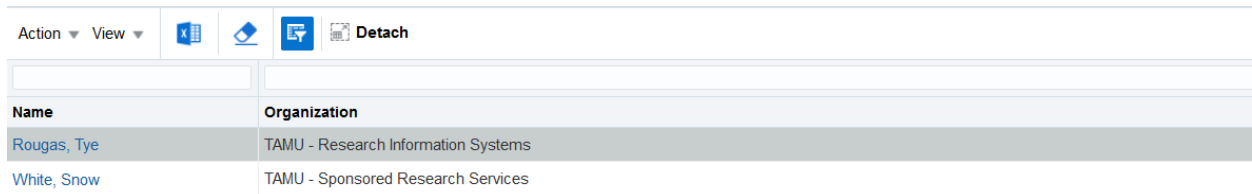
This search allows the user to find researchers with interest in certain research disciplines. It can be used to find collaborators/researchers throughout The Texas A&M University System.

By specifying a term to be searched and not selecting where to search, the system will go through all currently available sources:

- People file (names)
- Researcher selected keywords
- Intellectual Property / Technology Abstracts
- Research Project titles

With development of the remaining Maestro modules, this search will expand to proposal abstracts, publications, etc.

The results of the search will display a list of researchers with contact information. By drilling down on researcher name, the researcher profile information will be displayed.



5.1.2 AWARDS SEARCH

Award Title	Organization	Sponsor
Determining Value of Dried Distiller's Grains As A Supplement for ... Award Number: 0000570008	TAMUK-Caesar Kleberg Wildlife Institute	Adm - Alliance Nutrition
The Impact of Optigen II On Nitrogen Balance and Performance o... Award Number: 0000405269	AL-RSRCH-Animal Science	Alltech Incorporated
The Impact of Optigen II On Nitrogen Balance and Performance o... Award Number: 0000405269	AL-RSRCH-Animal Science	Alltech Incorporated

Awards search is designed for all researchers to find existing awards for sponsor, member, principal investigator, etc. Restricted awards are not included.

5.1.3 INVENTORY SEARCH

Description	Manufacturer	Model	Serial Num	Asset ID	Organization	Custodian	City	State	Acquisiti Date
Microscope Olympus Bx43f With Camera Adapter	Olympus	BX43F	5E43726	0000134193	AL-RSRCH-Vet - Pathobiology	Karkoska, Tina tkarkoska@cvm.tamu.edu	College Station	TX	19-Aug-2
Microscope Lens, Nikon Lambda_60x	Nikon	CFI PLAN APO LA...		1500536679	TAMHSC Molecular And Cellular Medicine	Eubanks, Lisa leubanks@medicine.tamhs...	College Station	TX	14-Aug-2
KNIFE-EDGE SCANNING MICROSCOPE FABRICATION	3SCAN	CUSTOM	TBD	2018703	---	-			12-Aug-2
Microscope Inverted Axio Vert A1	Zeiss	AXIO VERT A1	3847001485	0000134448	AL-RSRCH-Nutrition And Food Science	Mata, Lisa lmata@tamu.edu	College Station	TX	28-Jul-20
Microscope, Leica S6 E			104462945928...	1500039723	TAMU Department Of Biology & Chemistry	Mott, Daniel dmott@tamu.edu	Laredo	TX	27-Jul-20

Inventory Search gives Maestro users view into all research equipment that is kept in FAMIS and EPIK assets modules. They can find out where the equipment resides, when it was purchased and who is custodian.

5.1.4 KEYWORD SEARCH

Available Keywords

Search: All Any

Match: All Any

Keyword Id: Equals []

Keyword Desc: Contains [nano]

Desc Source: Starts with []

Keyword Id	Keyword Desc	Desc Source
12605	3D Nanostructures	EPIK (5/15/2009)
15242	Active Polymer Nanocomposites	EPIK (5/15/2009)
14175	Bio-Nano Hybrid Devices	EPIK (5/15/2009)
12885	Bio-Nano Packaging	EPIK (5/15/2009)
12618	Bio-Nanomachining	EPIK (5/15/2009)
13944	Bionano Hybrid Devices	EPIK (5/15/2009)
12621	Bionanotechnology	EPIK (5/15/2009)
14762	Bulk Nanostructured Metals	EPIK (5/15/2009)
12389	Carbon Nanotubes	EPIK (5/15/2009)

This screen gives researchers the ability to explore all available research keywords that exists in Maestro. The keywords are used to create associations with researcher expertise, area of interest, funding opportunities, etc.

5.2 FIND AVAILABLE FUNDING OPPORTUNITIES

Funding Opportunity Search

Search: All Any

RFP# Contains []

Title Contains [cattle]

Sponsor Equals []

Purpose Contains []

Keyword Contains []

Category Equals []

Ltd. Sub. Date: On or after []

Pre-proposal Date: On or after []

Deadline Date: On or after []

RFP Expire Date: On or after []

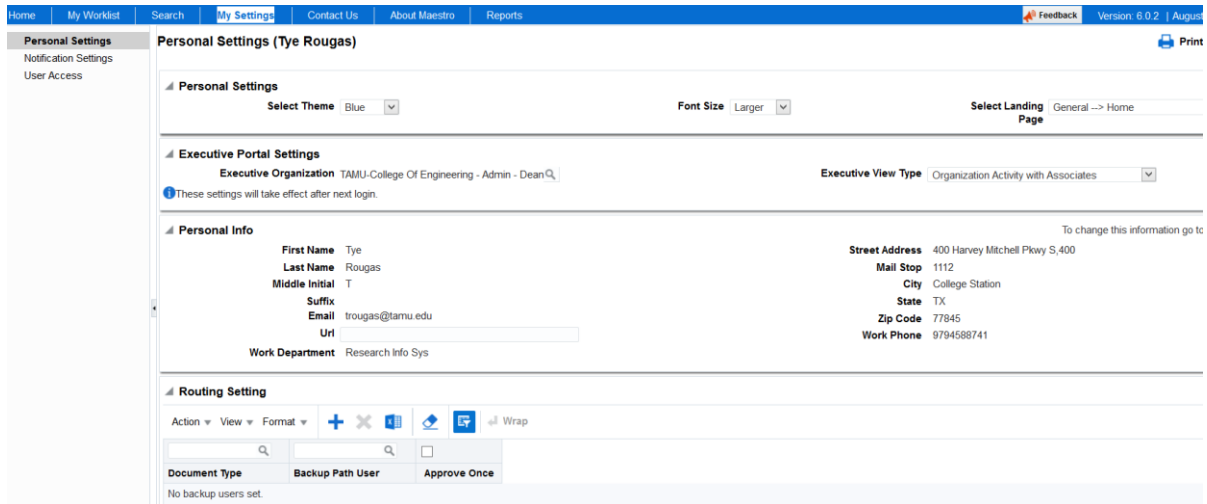
Title	Sponsor	RFP#	Review by OSRS	Ltd. Sub.	Ltd. Sub. Date	Pre-proposal Date	Deadline Date
National Park Service-Historic Resource Study: Cattle Rancing and Agricultural Practices and Updated National Register of Historic Places Nomination	Department of Interior	NPS-NOIP...	No	No			
Understanding Ecological Interactions between Free-Ranging Tule Elk and Cattle in the Pastoral Regions of Point Reyes National Seashore	Department of Interior	P14AS00374	No	No			
Walker River Restoration and Cattle Exclusion Pilot Project	Department of Interior	F14AS00396	No	No			

Maestro has nightly process in place to load Grants.gov funding opportunities. The opportunities are reviewed by Funding Opportunity administrator who can assign research keywords to it, or enter some additional opportunities. Searching can be done by sponsor, deadline, category, etc.

5.3 MY SETTINGS CONFIGURATION SETTINGS

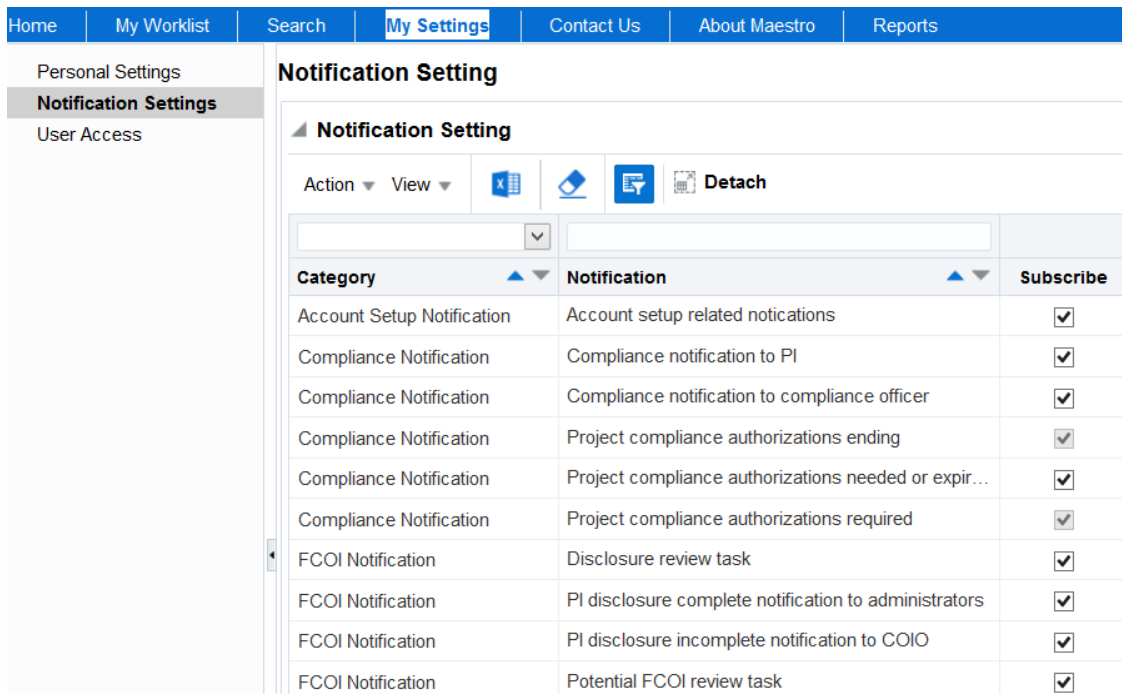
This screen displays settings for the person logged into Maestro.

5.3.1 PERSONAL SETTINGS



- Logged in user can add their work website in the 'URL' field.
- Define backup approvers for approving proposals and IDC waivers
- Upload a profile picture

5.3.2 NOTIFICATION SETTINGS



- Change notification settings for various system generated notifications

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5.3.3 USER ACCESS

Role Name	Access Type	Access Value
General Maestro User		
Researcher		
Researcher Reviewer	ORGANIZATION	TAMU-Geochemical & E...

- Displays maestro access/current permissions