What Researchers Need to Know about Maestro

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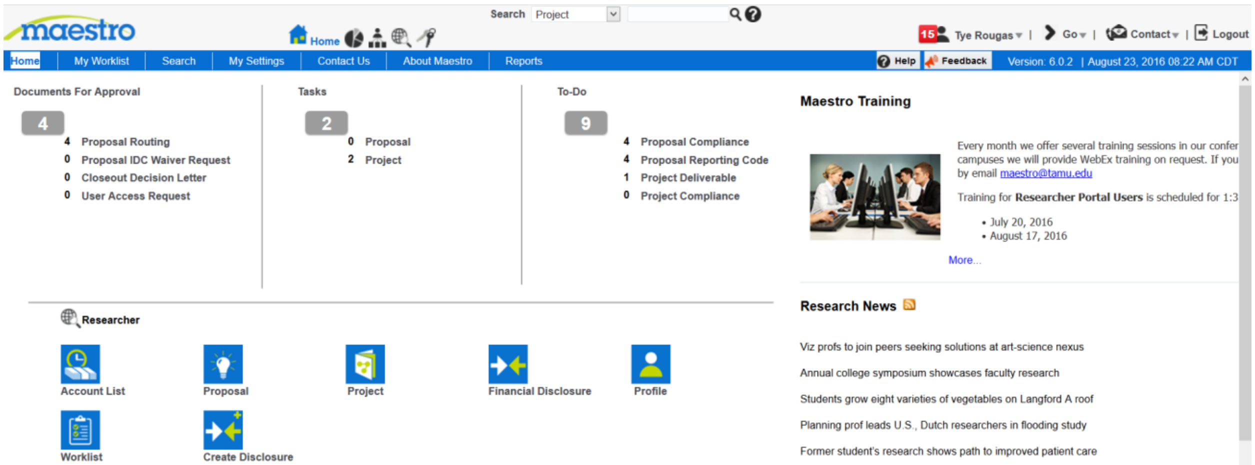
2 Introduction

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

2.2 FEEDBACK

Feedback provides a way for users to:

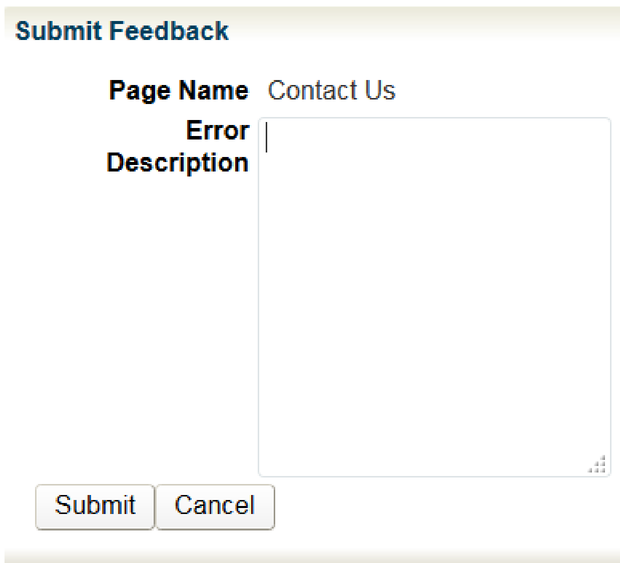
Submit suggestions or report problems with the functionality of the system:

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

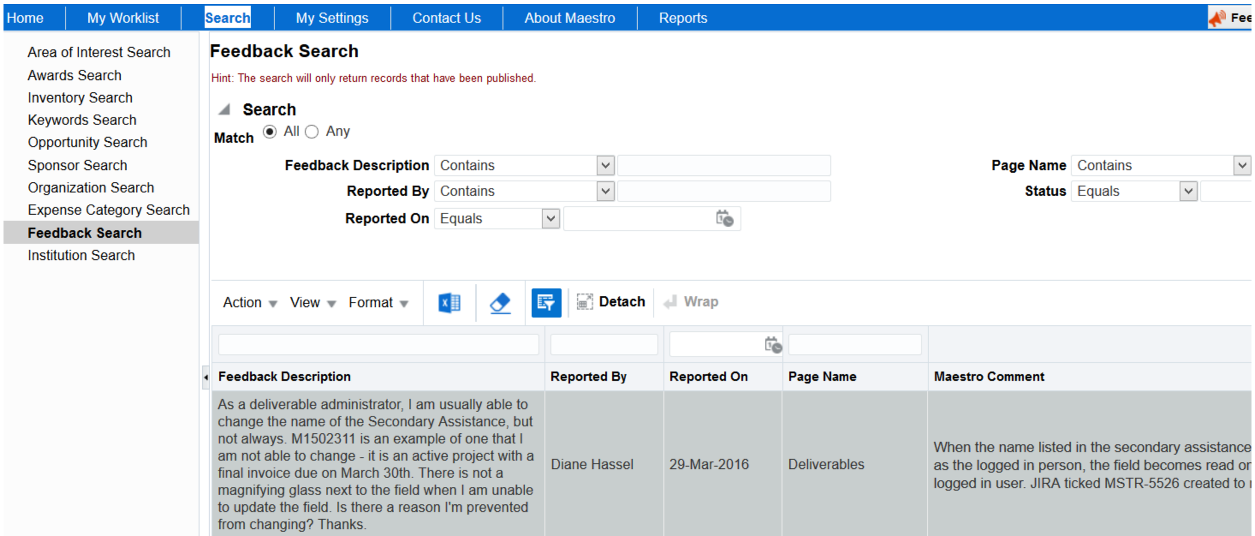
To initiate and submit feedback:

1. Click the **Feedback** button (

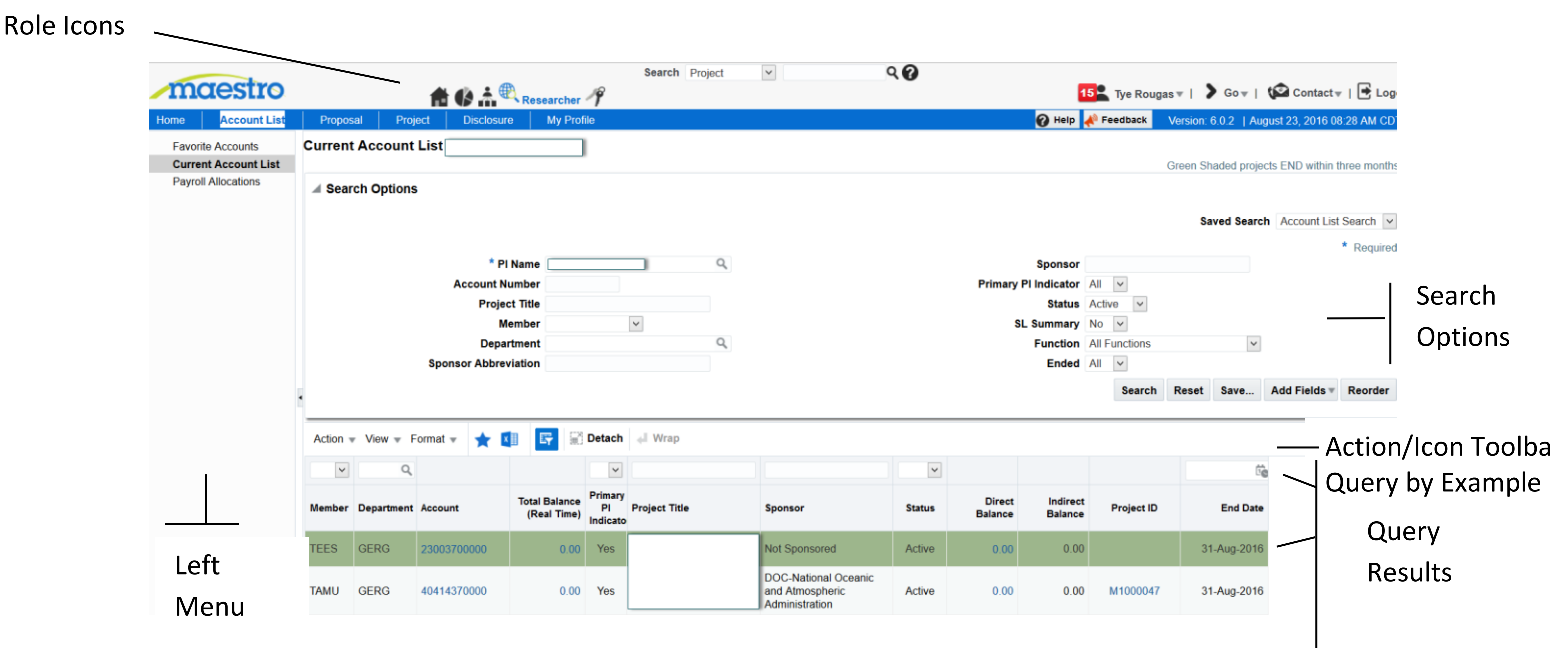
) on the blue bar near the upper right-hand corner of the screen. The screen below is displayed:



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 – 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

- Query by Example
- Search Results

Notes

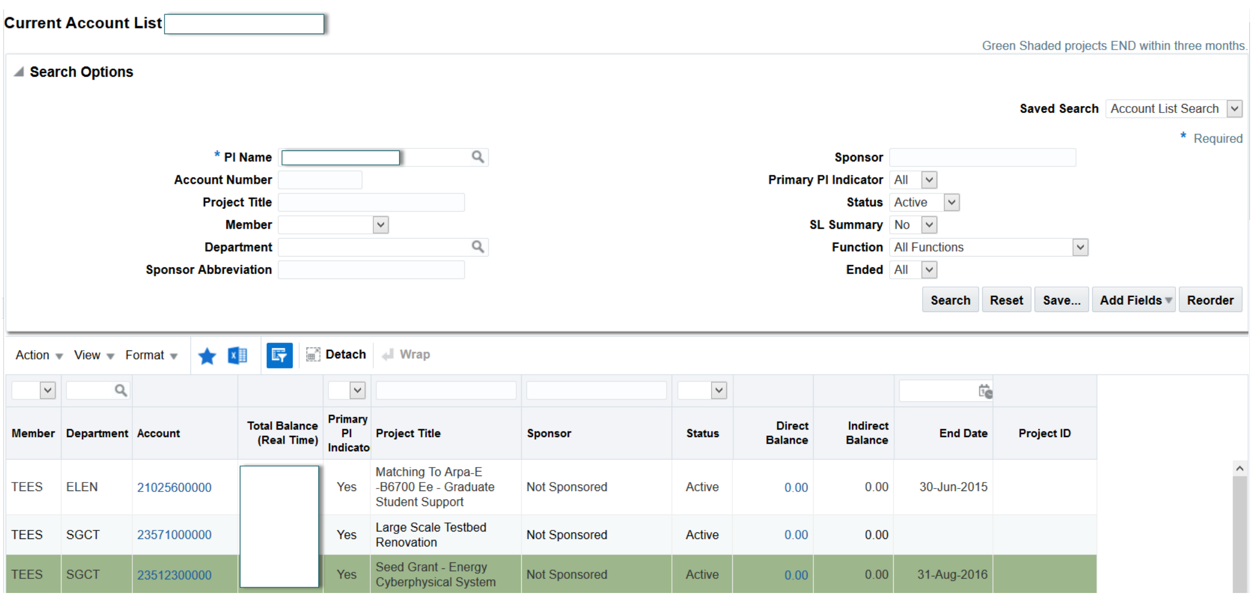
- Search icon
- Items listed in 'blue' are direct links to detailed information.

4 Researcher Module

The Researcher Module represents a doorway to information for research activities relevant to individual researchers. After sign-on, Researchers have access to view Financial Accounts, Projects, or create/view Proposals.

4.1 How Do I View Account Balances and Transactions

4.1.1 Current Account List

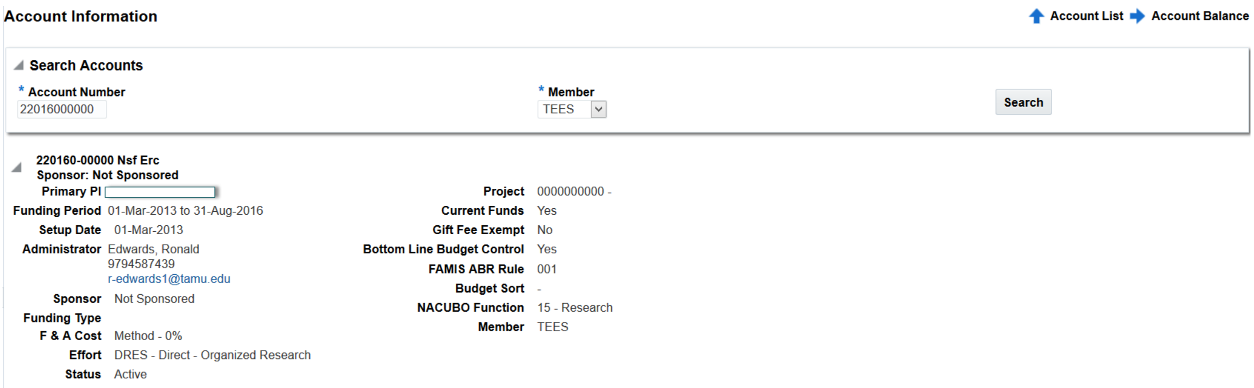


This screen shows researchers all of their accounts and balances, regardless of who is the administering organization. By default, the screen is showing the list of all active SA accounts for the main Principal Investigator (PI) – the logged in user. If the application security permits (Researcher Reviewer role) user can switch to another PI by selecting different name. In case the selection was made to see the list of SL summaries, the balance will show summary of all related SA balances. If the balance column says real time then the balance is real time from FAMIS. Account number link takes users to Account Info screen and Balance link drills down to Account Balance screen. Project ID link takes user to Project Info screen.

Note:

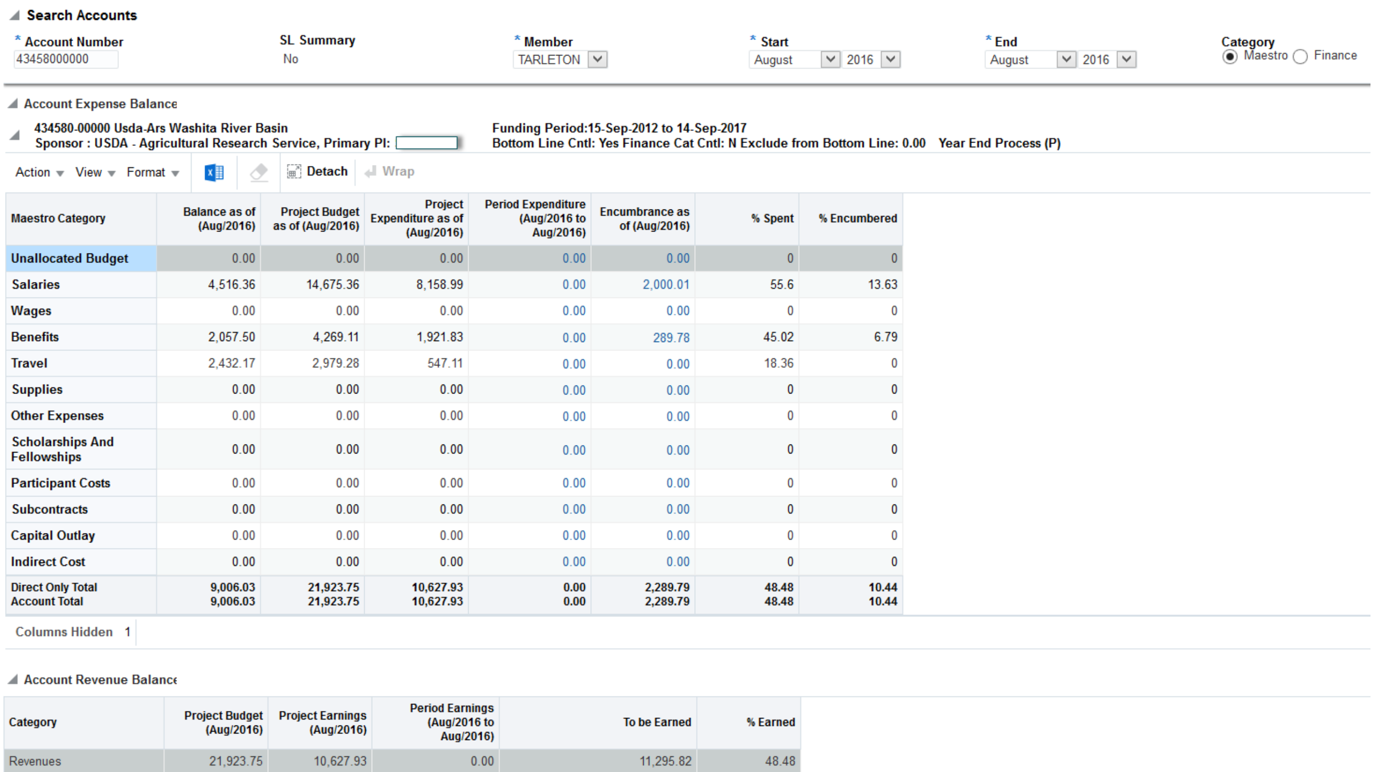
- Researchers have automatic access to all of their accounts if they are listed as responsible person on the account.

4.1.2 Account Information



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.

4.1.3 Account Balance – (Real Time Balances)



Search Accounts

* Account Number 43458000000 | SL Summary No | * Member TARLETON | * Start August 2016 | * End August 2016 | Category Maestro Finance

Account Expense Balance

434580-00000 Usda-Ars Washita River Basin
Sponsor : USDA - Agricultural Research Service, Primary PI:

Funding Period:15-Sep-2012 to 14-Sep-2017
Bottom Line Cntl: Yes Finance Cat Cntl: N Exclude from Bottom Line: 0.00 Year End Process (P)

Action View Format Detach Wrap

Maestro Category	Balance as of (Aug/2016)	Project Budget as of (Aug/2016)	Project Expenditure as of (Aug/2016)	Period Expenditure (Aug/2016 to Aug/2016)	Encumbrance as of (Aug/2016)	% Spent	% Encumbered
Unallocated Budget	0.00	0.00	0.00	0.00	0.00	0	0
Salaries	4,516.36	14,675.36	8,158.99	0.00	2,000.01	55.6	13.63
Wages	0.00	0.00	0.00	0.00	0.00	0	0
Benefits	2,057.50	4,269.11	1,921.83	0.00	289.78	45.02	6.79
Travel	2,432.17	2,979.28	547.11	0.00	0.00	18.36	0
Supplies	0.00	0.00	0.00	0.00	0.00	0	0
Other Expenses	0.00	0.00	0.00	0.00	0.00	0	0
Scholarships And Fellowships	0.00	0.00	0.00	0.00	0.00	0	0
Participant Costs	0.00	0.00	0.00	0.00	0.00	0	0
Subcontracts	0.00	0.00	0.00	0.00	0.00	0	0
Capital Outlay	0.00	0.00	0.00	0.00	0.00	0	0
Indirect Cost	0.00	0.00	0.00	0.00	0.00	0	0
Direct Only Total Account Total	9,006.03 9,006.03	21,923.75 21,923.75	10,627.93 10,627.93	0.00 0.00	2,289.79 2,289.79	48.48 48.48	10.44 10.44

Columns Hidden 1

Account Revenue Balance

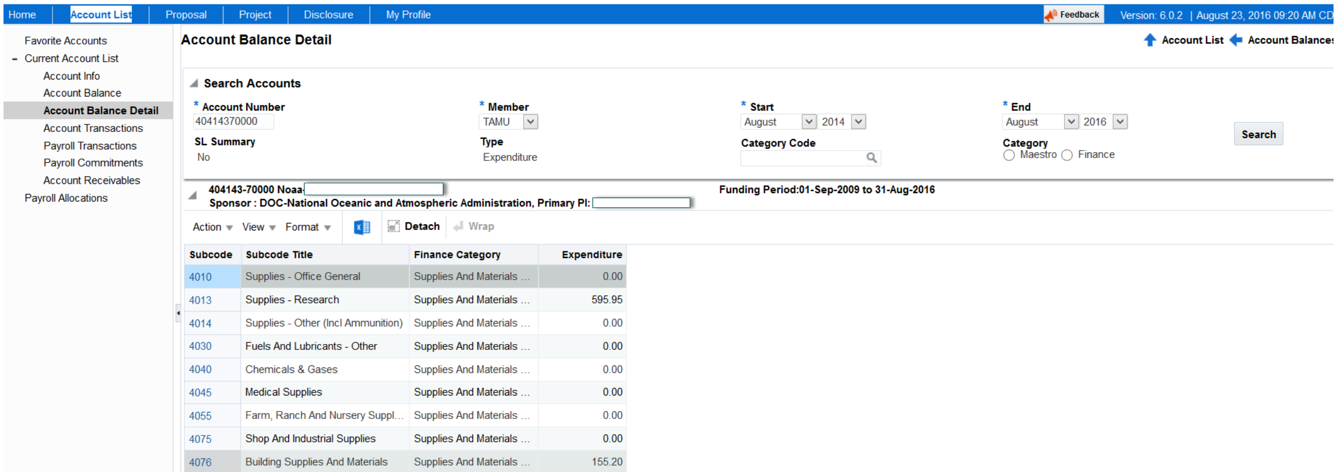
Category	Project Budget (Aug/2016)	Project Earnings (Aug/2016)	Period Earnings (Aug/2016 to Aug/2016)	To be Earned	% Earned
Revenues	21,923.75	10,627.93	0.00	11,295.82	48.48

Screen displays account balances by category and account revenue balance. Maestro Category is the default selection but the category can be changed to Finance. If title says (Real Time Balance) then the balances displayed are real time from FAMIS. Screen can be accessed from Account List screen or a direct menu click. Period Expenditure drills down to Account Balance Detail screen. Encumbrance drill down takes us to Accounts transaction screen and displays all documents that make the encumbrance (documents that are currently in routing are excluded).

If salary, wages and fringe (category code = 1100, 1700, 1800, 1101, 2000, 2500, 9600) encumbrances are requested, drill-down will take you to Payroll Commitment screen unless the account belongs to TAMRF. In that case you will look at Account Transactions because these encumbrances are made through the regular accounting encumbrance process.

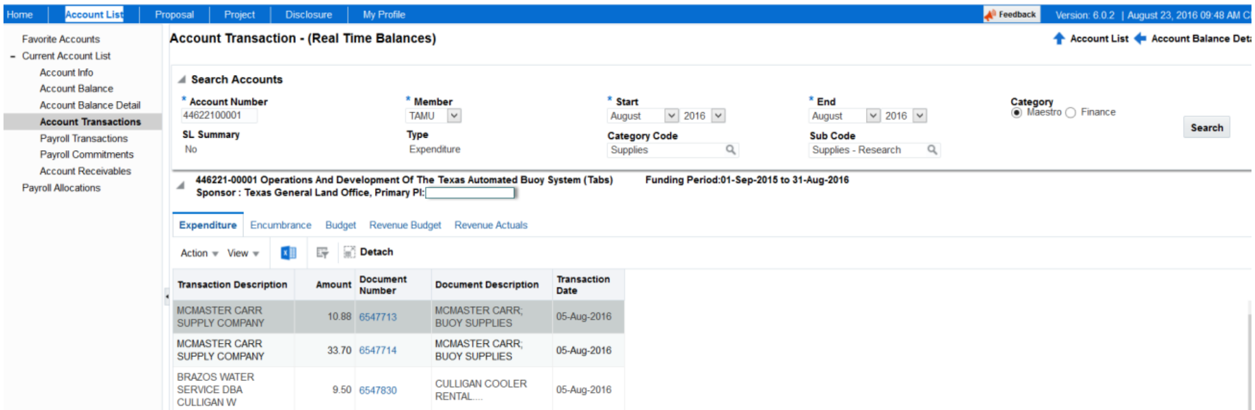
Columns Budget as of, Expenditure as of display budget and expenditures for project inception to specified End date for research projects. Year based projects have only current year values. Column Encumbrance displays value for encumbrance as of End date. Column Period Expenditure can display cumulative expenditure for the selected period (Start Date – End Date).

4.1.4 Account Balance Detail



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.

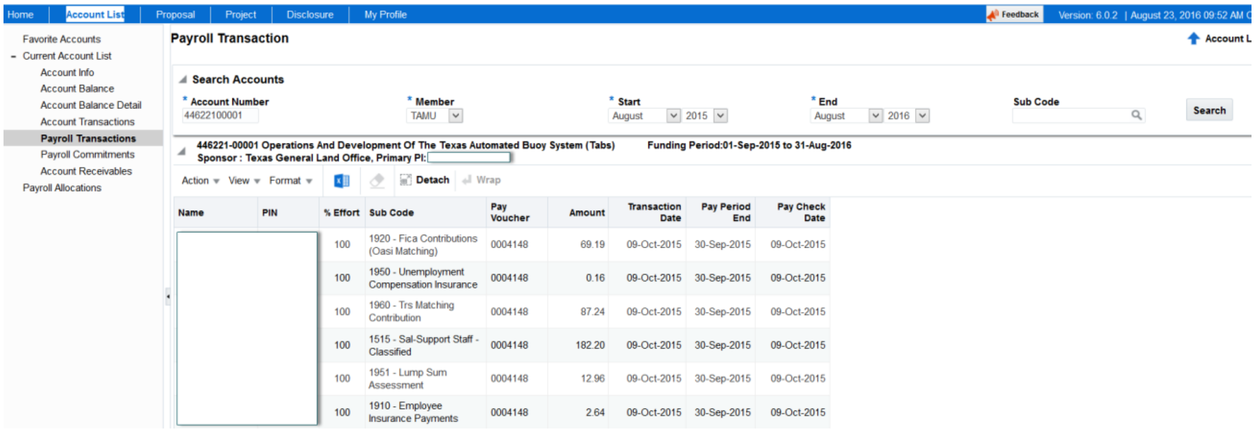
For expense document(s), click on:

- 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:

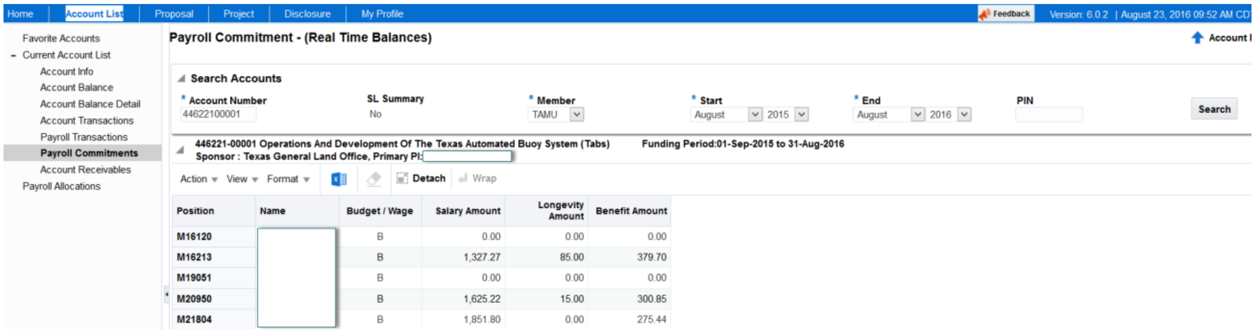
- Document number link displays purchase document report for FAMIS accounts
- Document number link displays purchase requisition for TEES accounts with activity before September 1, 2015 and image related to the transaction

4.1.6 Payroll Transactions



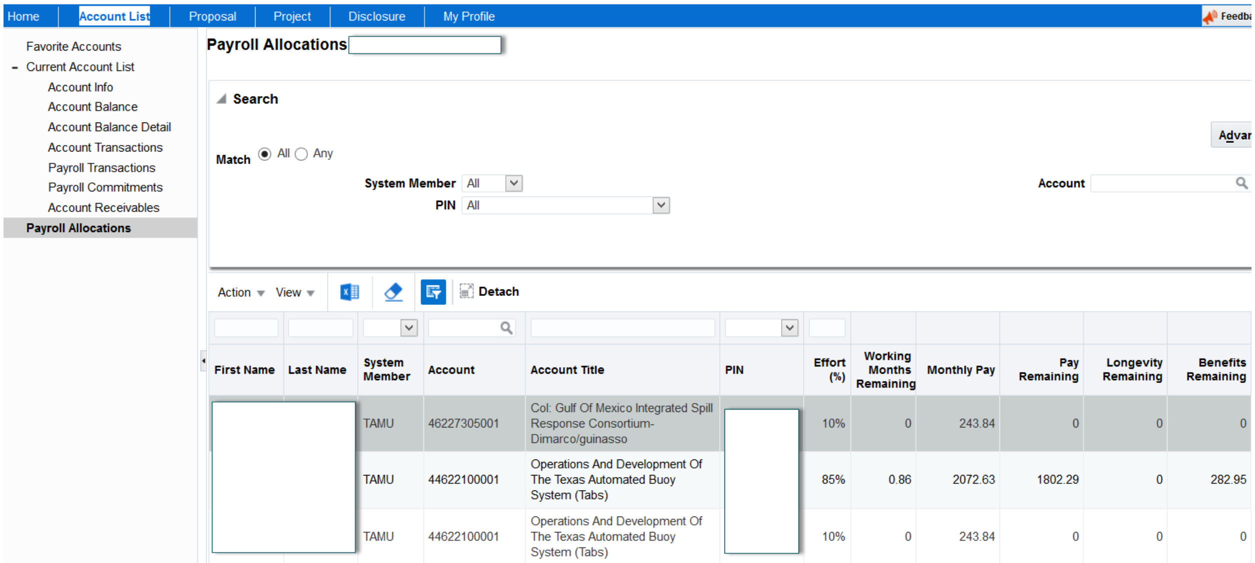
This screen displays detail payroll transaction at individual position pin level. No web services involved. Navigation to this screen is only through direct menu access.

4.1.7 Payroll Commitments



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



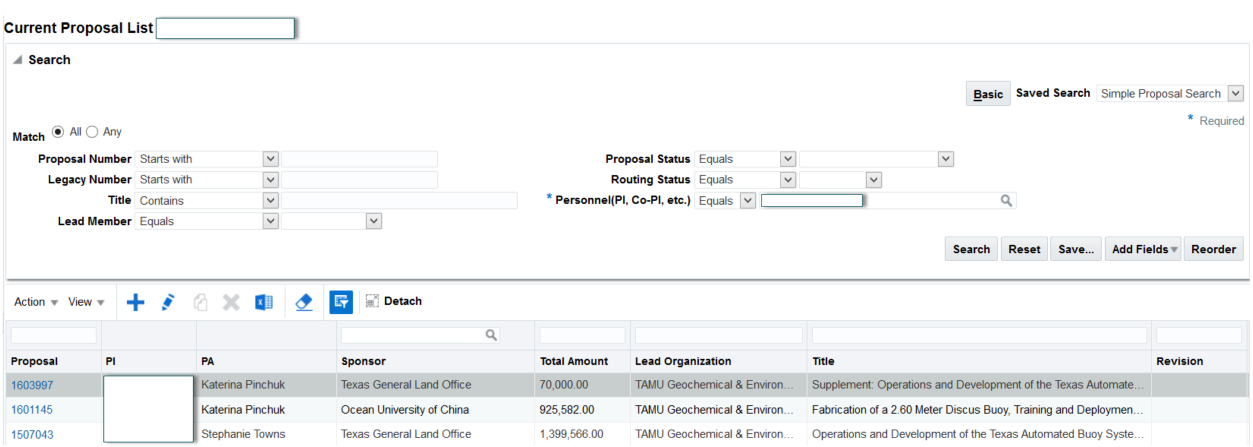
The purpose of this screen is to provide the account owners with information about projected payroll yet to be paid. The data for this screen comes from BPP Active Budget. The active budget is scanned for currently active and future iterations for a single fiscal year. A line is written to the extract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



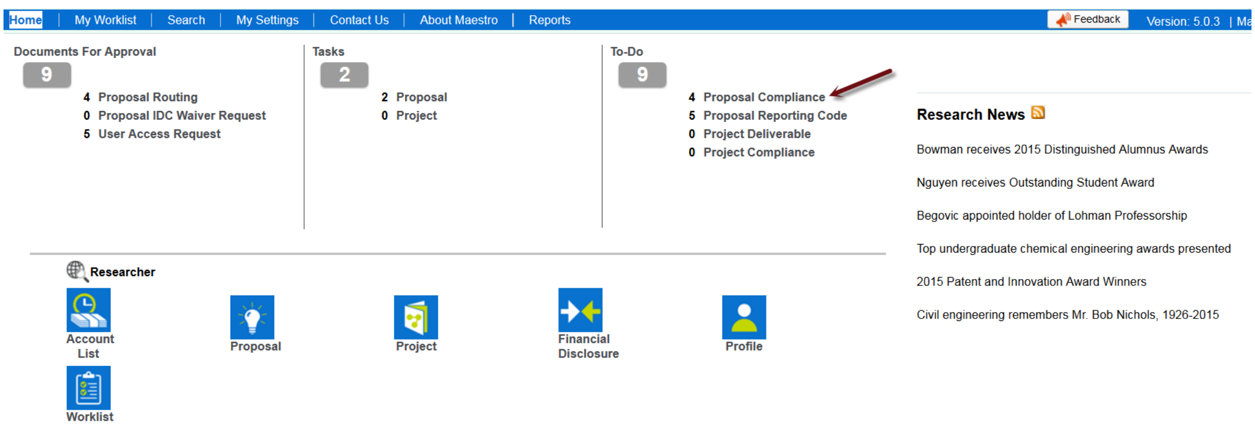
This screen allows researchers to search for proposals or create official proposals (blank or copy). Search results are filtered based on security settings and only displays proposals that the current user has access to.

The current user must be one of the following cases:

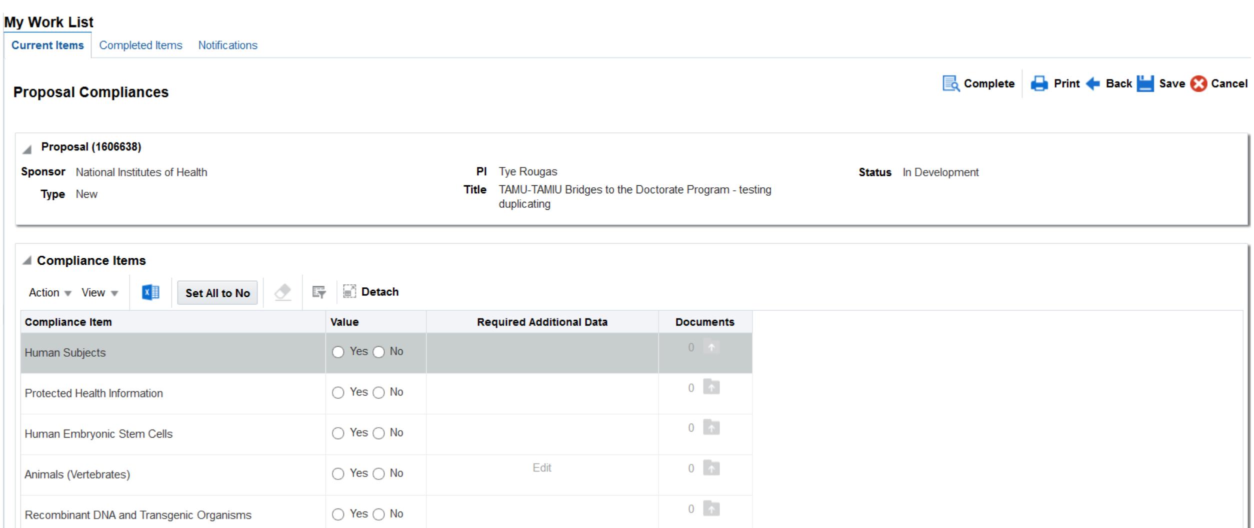
1. Is Principal Investigator (PI) of the proposal.
2. Has “Researcher Administrative Assistant” role and is designated as PI delegate in PI’s “My Settings”.
3. Has “Researcher Reviewer” role and is granted access to the proposal’s lead organization/center/admin organization or its ancestor organization.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



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 “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:

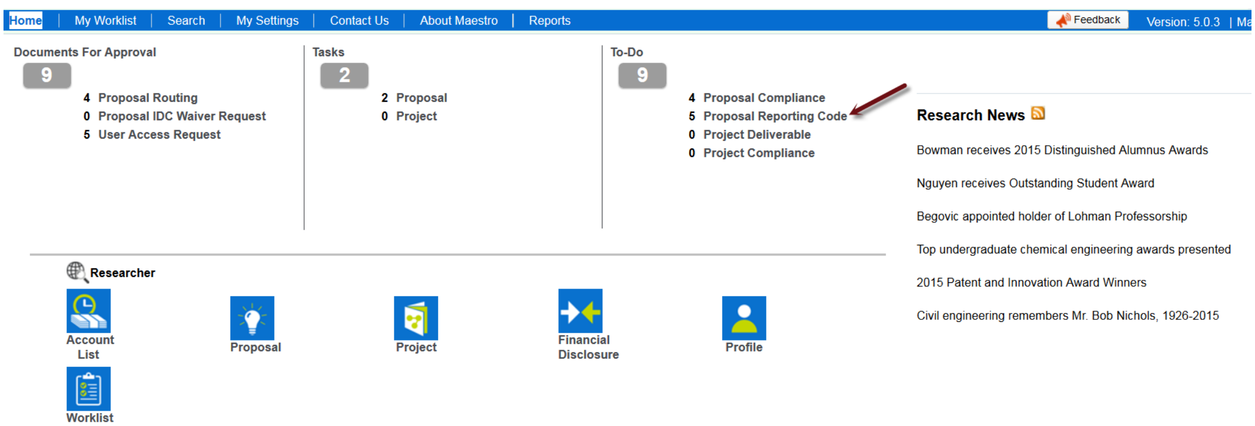
- Yes – this compliance item applies to this proposal
- No – this compliance items does not apply to this proposal

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.

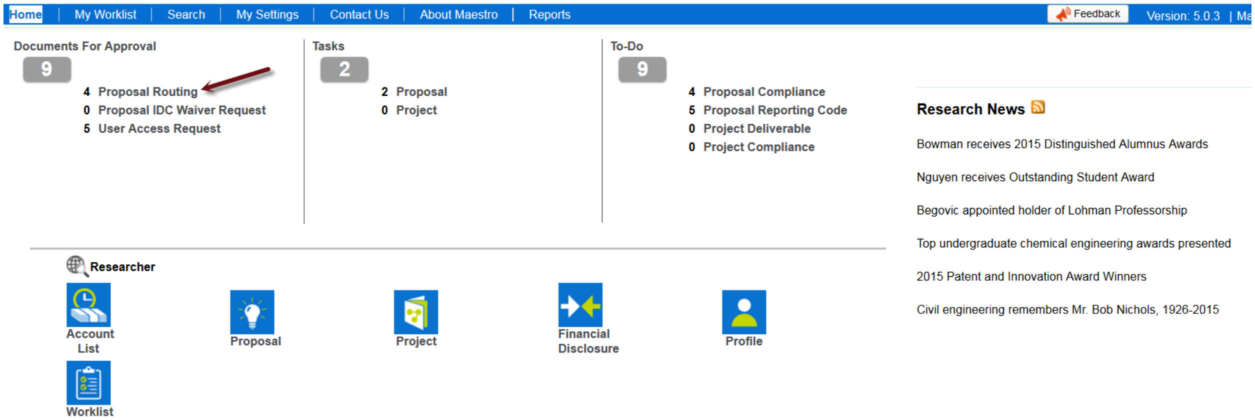
a) 5A = COMPETITIVE, PEER-REVIEWED – Proposal is submitted to sponsor and will be competitively reviewed and evaluated with other submissions before an award is made.
b) 5B = NEGOTIATED OR OTHER – Funding or contract has been awarded to PI without competitive submission of proposal and review by the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

Click the complete icon 

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.



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

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

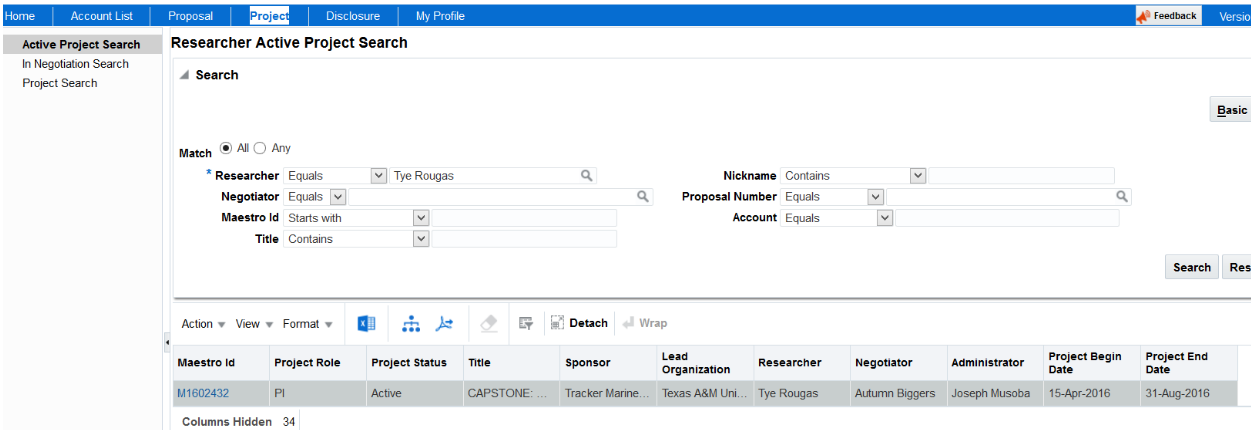
Display all notes associated with the proposal. Any user who has security access to the proposal may create a note. Notes are viewable by all users who have view security access to the proposal.

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.

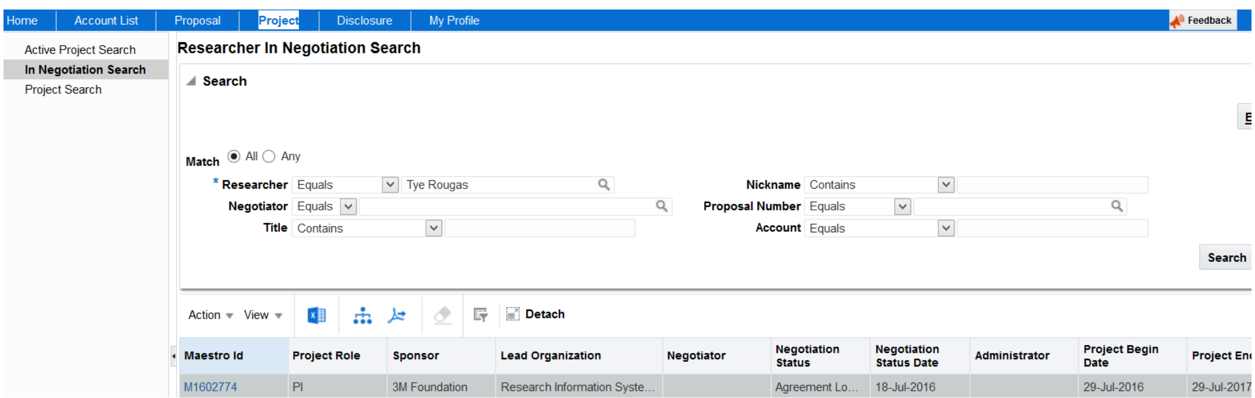
4.3 How Do I View Projects and Upload Project Deliverables

4.3.1 Viewing Active Projects



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

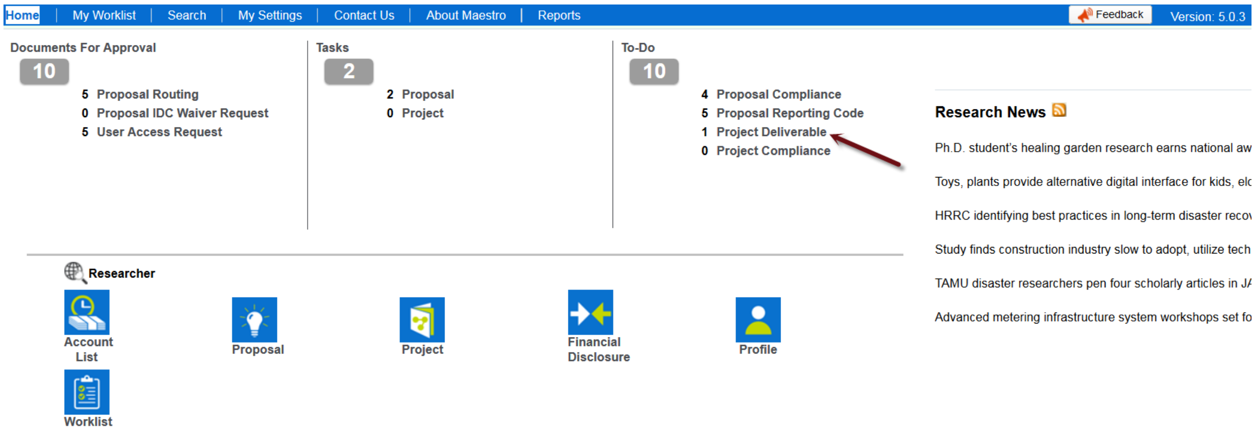
4.3.2 Viewing Projects in Negotiation



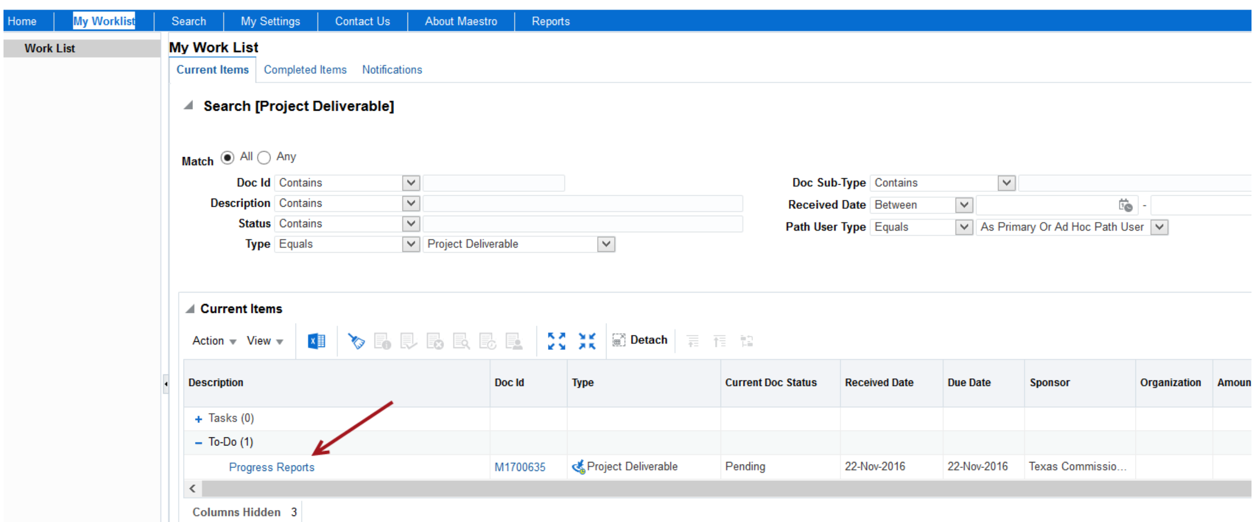
This screen shows researchers all of their projects in negotiation (all projects with a status of not ‘Fully Executed’), regardless of who is the administering organization.

4.4 Uploading Project Deliverable

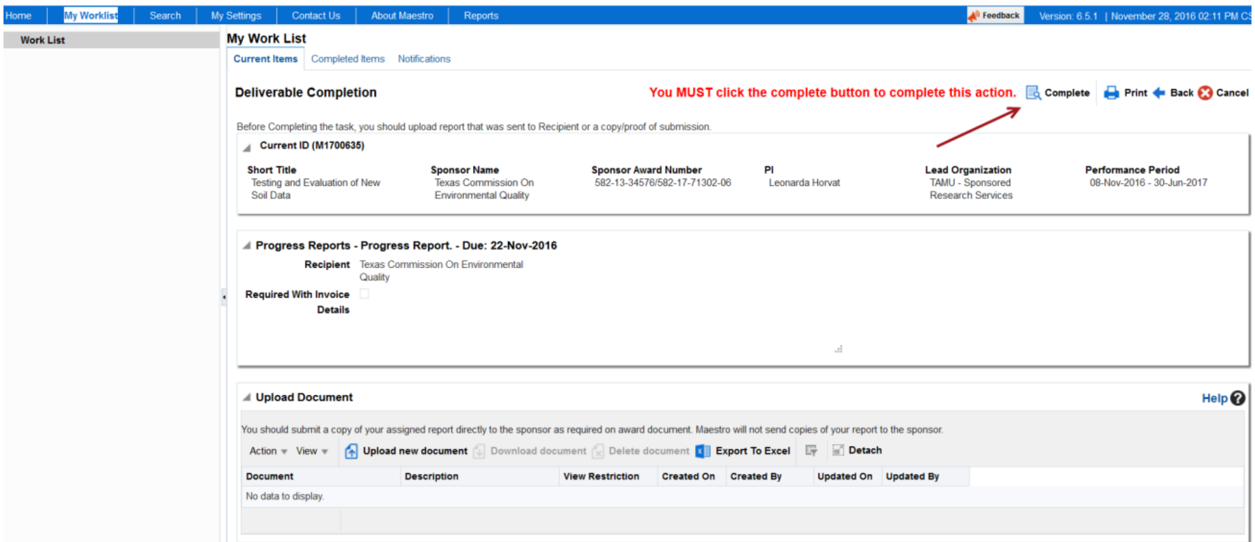
Project deliverables that need to be completed in the next two weeks will appear in the Principal Investigator’s To-Do listing on the home page.



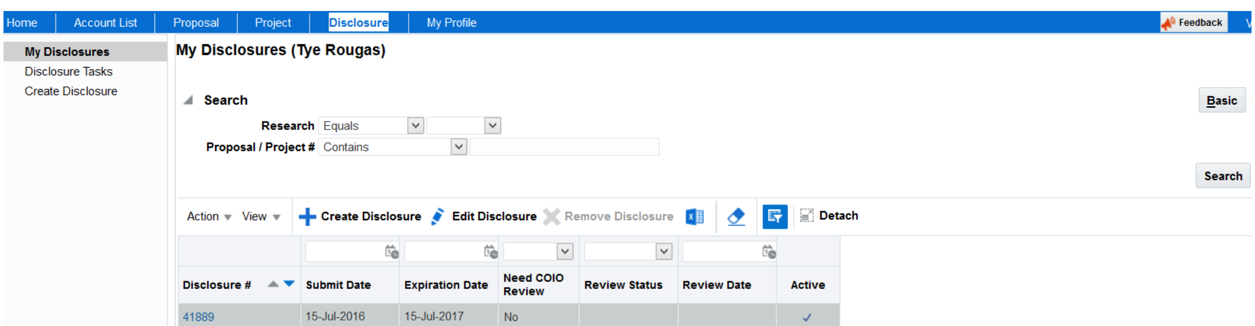
Click the ‘Project Deliverable’ hyperlink to navigate to your work list to view the associated deliverables that need to be completed. Click the description hyperlink to open the deliverable details screen.



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.



4.5 Submitting Financial Conflict of Interest Disclosures



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 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.

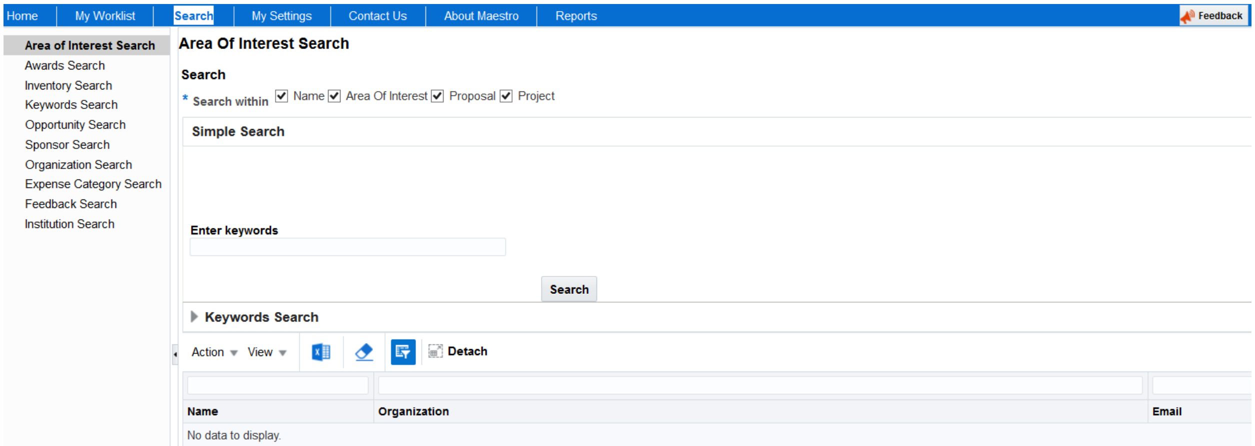
Examples of an SFI include: stock; stock options; bonds; other equity or ownership interests; consulting fees; honoraria; paid authorships; intellectual property; royalty interests; sponsored travel (unless such travel is reimbursed by a local, state or federal government agency or an institution of 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 of 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



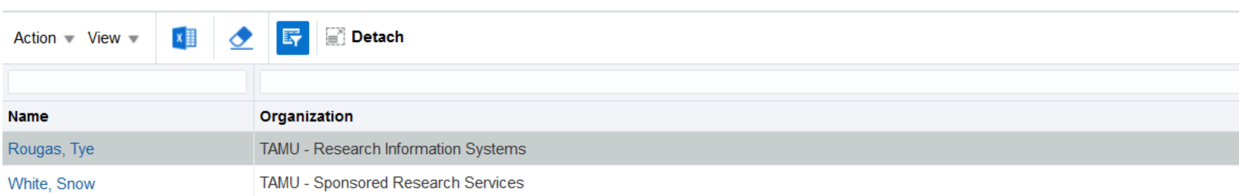
This search allows the user to find researchers with interest in certain research disciplines. It can be used to find collaborators/researchers throughout The Texas A&M University System.

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

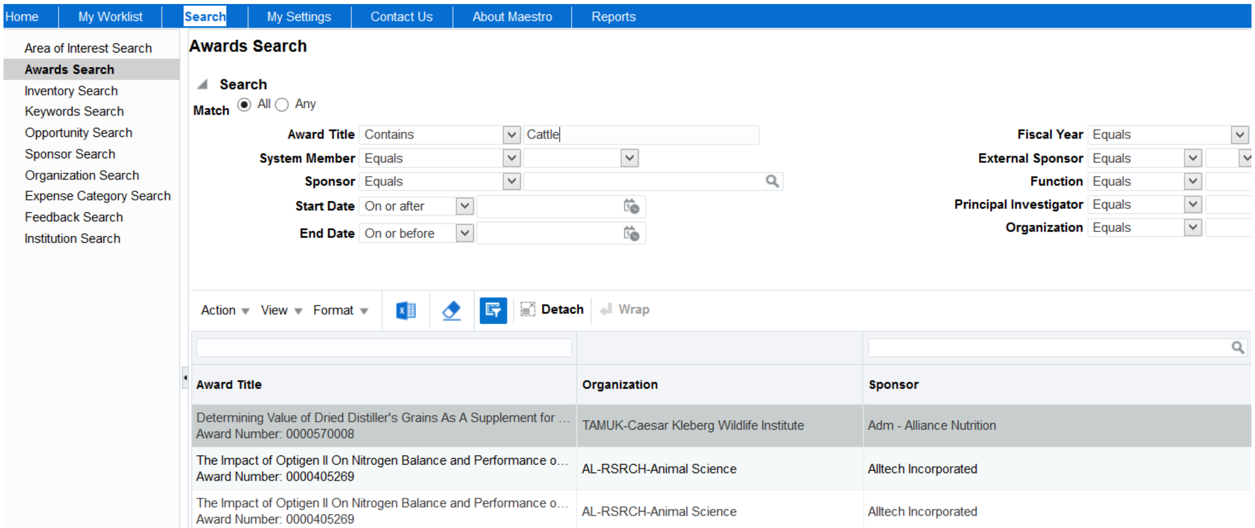
- People file (names)
- Researcher selected keywords
- Intellectual Property / Technology Abstracts
- Research Project titles

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.

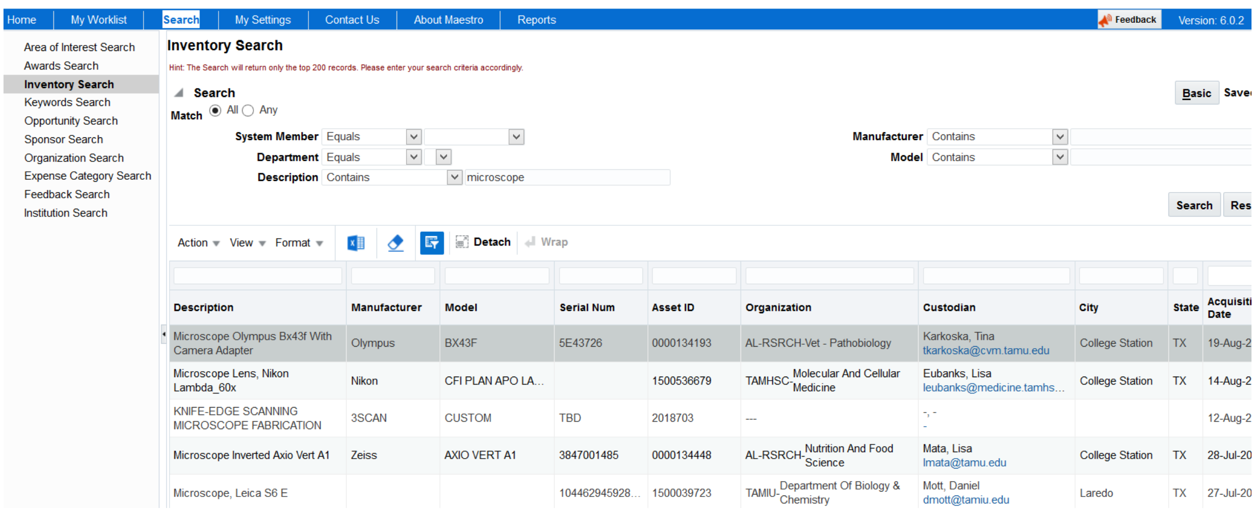


5.1.2 Awards Search



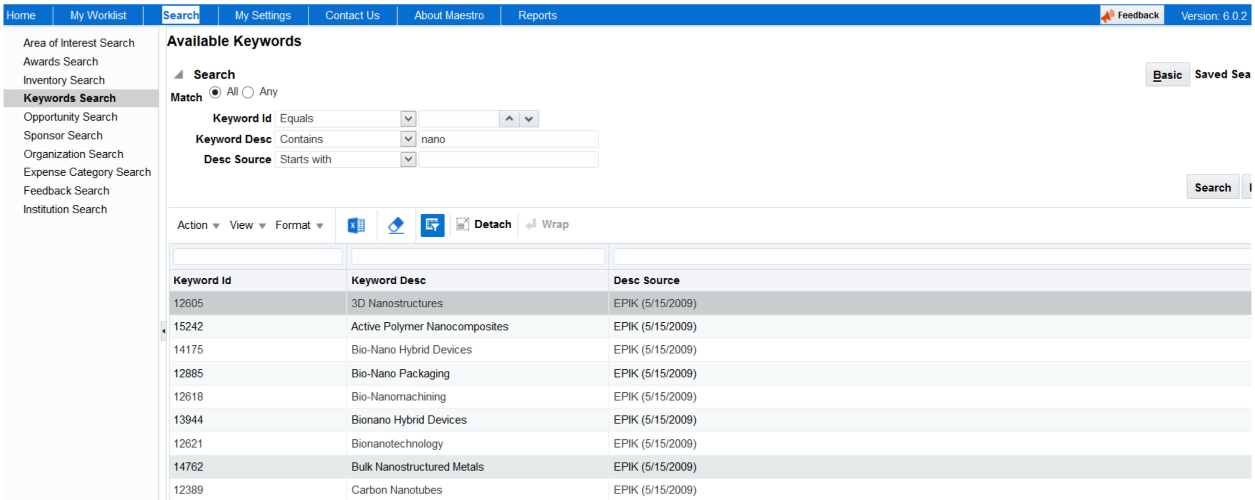
Awards search is designed for all researchers to find existing awards for sponsor, member, principal investigator, etc. Restricted awards are not included.

5.1.3 Inventory Search



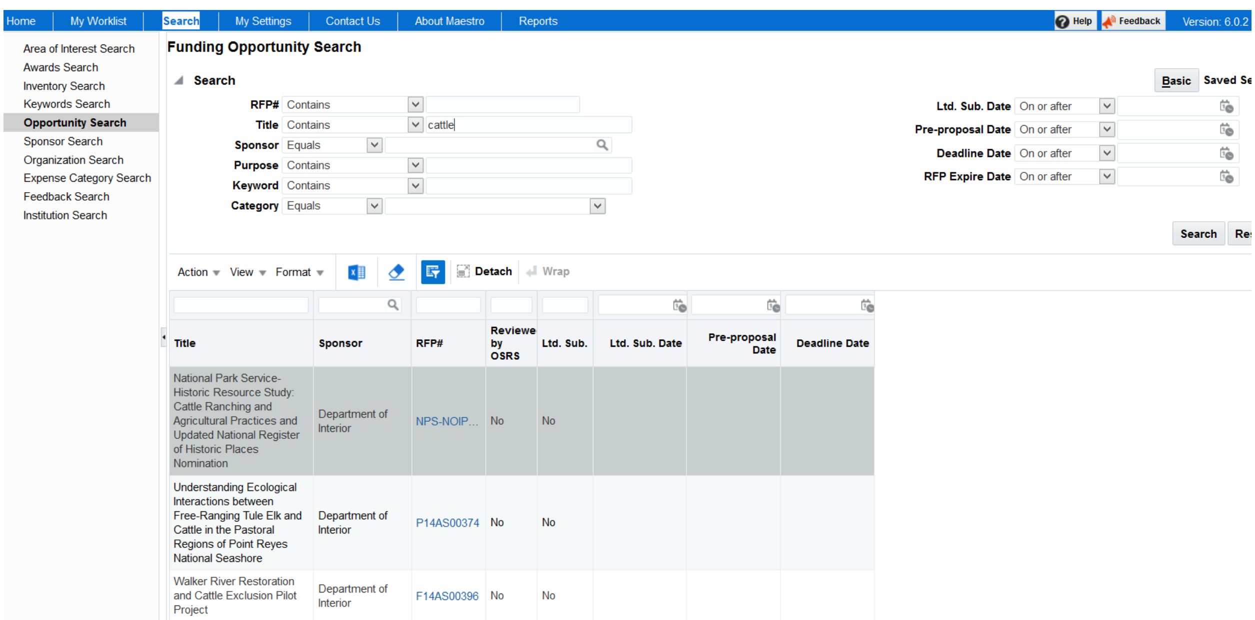
Inventory Search gives Maestro users view into all research equipment that is kept in FAMIS and EPIK assets modules. They can find out where the equipment resides, when it was purchased and who is custodian.

5.1.4 Keyword Search



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

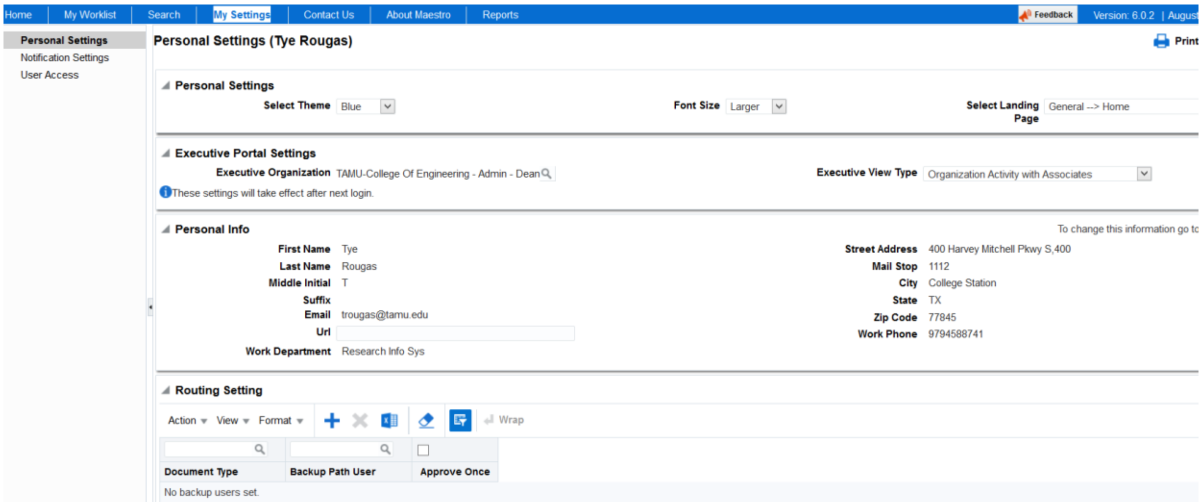


Maestro has nightly process in place to load Grants.gov funding opportunities. The opportunities are reviewed by Funding Opportunity administrator who can assign research keywords to it, or enter some additional opportunities. Searching can be done by sponsor, deadline, category, etc.

5.3 My Settings Configuration Settings

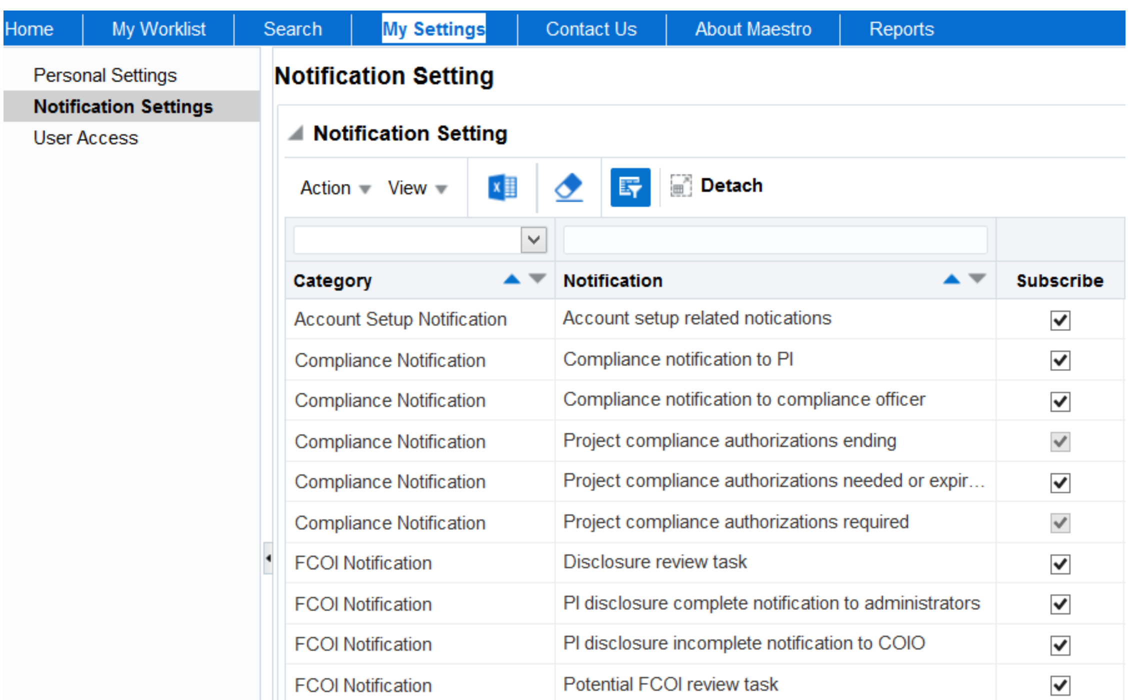
This screen displays settings for the person logged into Maestro.

5.3.1 Personal Settings



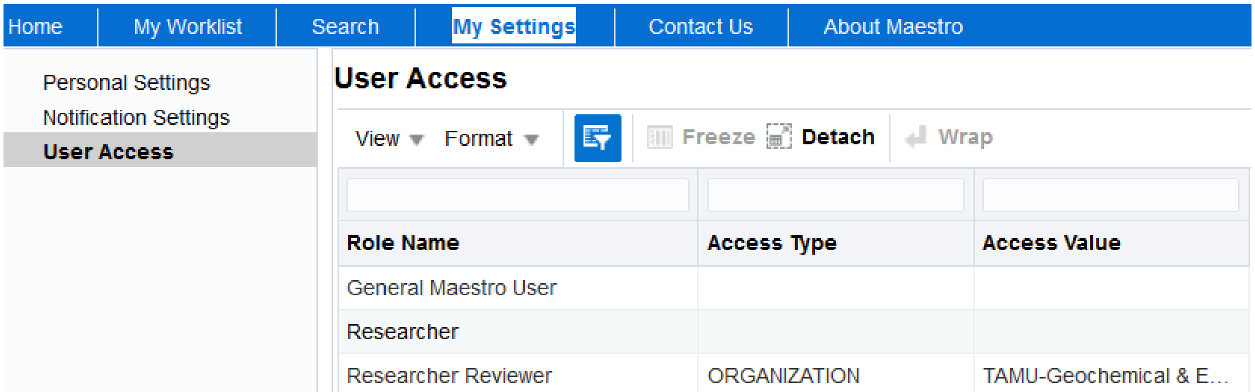
- Logged in user can add their work website in the ‘URL’ field.
- Define backup approvers for approving proposals and IDC waivers
- Upload a profile picture

5.3.2 Notification Settings



- Change notification settings for various system generated notifications

5.3.3 User Access



- Displays maestro access/current permissions