

Maestro Training- General Overview

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TEXAS A&M
AGRILIFE

maestro
Texas A&M University System

What is Maestro?

A newly developed system to support
researchers & specialist and research
administration across the
Texas A&M University System

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Program Objectives

- ⦿ Provide researchers & specialist with timely and accurate information needed to manage their research & extension activities and to establish collaborations
- ⦿ Publish up to date research key performance indicators for all TAMUS institutions and Board of Regents.
- ⦿ Streamline research administration processes to minimize inefficiencies and improve turnaround time

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Phase I Research Portals

- ⦿ Creates a Research Data Warehouse By combining FAMIS, B/P/P, Canopy, Epik
- ⦿ Gives researchers & specialist easy access to all their projects & accounts and associated documents
- ⦿ Administration and executives will be able to monitor and analyze proposal, award and research expenditure activity

Currently Available

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Phase II Pre-Award and Post-Award

- ⦿ Pre-Award: Will allow for the creation, routing, verification, validation, and submission of proposals electronically.

Currently Available

- ⦿ Post-Award: Will expedite award acceptance, minimize budget and cost sharing data entry, improve project compliance and simplify the project close-out process.

Currently Available

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Phase III Research Finance

- ⦿ Will consists of systems such as research sponsor billing, receivable reconciliation, indirect cost calculation and distribution, payroll certification and internal/external reporting

Development Expected to start 2015.

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Getting Started

- Maestro Website:
 - <https://maestro.tamus.edu>
- Account Request Form:
 - All Accounts are now set up Electronically
 - PIs automatically get an account once they are added to an account in Famis, a proposal, or contract.
 - Supervisor have log in access to approve an account

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How does it work?

The screenshot shows the Maestro website interface. On the left, there is a login section with fields for 'USER' and 'PASSWORD', and a 'Log In' button. Below the login section is a bar chart titled 'AM System Awards' showing data for the years 2010, 2009, 2008, and 2007. A callout box points to the login section with the text 'Use your SSO Log-In info'. On the right side of the page, there is a 'NEWS' section and an 'OPPORTUNITY' section. A callout box points to the 'OPPORTUNITY' section with the text 'Gives funding opportunities'. The website header includes the 'maestro' logo and navigation links like 'HOME' and 'FOR RESEARCHERS'. The footer includes 'The Texas A&M University SYSTEM' and 'Information Systems'.

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The screenshot shows the 'maestro' interface for 'Current Account List(sandner, Tribbie)'. The top navigation bar includes 'General', 'Executive', 'Administrator', and 'Researcher'. A sidebar on the left lists 'Favorite Accounts', 'Account Info', 'Account Balance', etc. The main area contains a search form with fields for 'PI Name', 'Account Number', 'Project Title', 'Member', and 'Department'. Below the form is a table with columns: 'Member', 'Project Title', 'Department', 'Total Balance (Real Time)', 'Direct Balance', 'Priority', and 'Status'. The table lists several entries with negative balance values.

Callout boxes provide the following information:

- Change between Accounts & Projects**: Points to the 'Current Account List' header.
- Help, Gives more information about screens.**: Points to the 'Help' icon in the top right.
- If you are having an issue with a screen, use Feedback to help us improve**: Points to the 'Feedback' icon in the top right.

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General Tab

The screenshot shows the 'maestro' interface for the 'General Tab'. The top navigation bar includes 'Home', 'Executive', 'Administrator', and 'Researcher'. A sidebar on the left lists 'Area of Interest Search', 'Awards Search', 'Keywords Search', etc. The main area contains a search form with fields for 'Name', 'Area of Interest', 'Intellectual Property', and 'Project Title'. Below the form is a table with columns: 'Name', 'Organization', 'Email', and 'Job'.

Callout boxes provide the following information:

- Search Features**: Points to the search form.
- Approve Worklist Items**: Points to the 'WorkList' link in the top navigation bar.
- FAQs**: Points to the 'FAQs' link in the top navigation bar.

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Researcher Tab- My Profile

My Performance

Fiscal Year From: 2015 Fiscal Year To: 2015

Researcher Performance : Proposal

Report Year	Submitter Count	Submitted Amount	Withdraw Pending Count	Award Count	Average Submitted Count
No data to display.					

Researcher Performance : Awards

Year	Amount	Award Count
No data to display.		

Provides Specific performance measures

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My Settings- Step By Step Instructions provided separately.

MySettings (Tribbie Sandner)

Profile Picture: Tribbie Sandner

Personal Settings: Select Skin, Font Size, Select (General -> Worklist)

Executive Portal Settings: Organization, Executive View Type

Personal Info: First Name, Last Name, Middle Initial, Suffix, Email, Street Address, Mail Stop, City, State, Zip Code, Work Phone

Work Department: Directors Office

Routing Setting: Document Type, Backup Path User, Approve Once

Delegate Setting: Delegate, Member, Organization, Delegate Access, Certify

Add your website

Change where you land when you log in

Add alternate approver

Add Delegate

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Researcher Tab- Area of Interest

E.g. for Keyword search are: 'Bio%' or '%med%' or '%Engineering'

Keyword Description	Is Primary Interest ?
2D Active Contours	<input type="checkbox"/>
3D Active Contours	<input type="checkbox"/>
3D Graphics	<input type="checkbox"/>
3D Microneuplications	<input type="checkbox"/>
3D Modeling	<input type="checkbox"/>
3D Nanostructures	<input type="checkbox"/>
ABA	<input type="checkbox"/>
A2	<input type="checkbox"/>
AIDS	<input type="checkbox"/>
AIDS Counseling	<input type="checkbox"/>
AIDS Mental Health	<input type="checkbox"/>
AIDS Mouse Model	<input type="checkbox"/>
AIDS Perinatal/Pediatric	<input type="checkbox"/>
AIDS Sexually Transmitted	<input type="checkbox"/>
AIDS Substance Abuse	<input type="checkbox"/>
APEX Model	<input type="checkbox"/>
AP1 1114	<input type="checkbox"/>

Is Primary Interest ?	Keyword Description
<input type="checkbox"/>	Poultry
<input type="checkbox"/>	Poultry Industry
<input type="checkbox"/>	Poultry Processing
<input type="checkbox"/>	Poultry Science

Add Keywords for Funding Opportunities and Keyword Searches

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Researcher Tab- Account Search

Export to Excel

View accounts that you are Co-PI on.

Account balances with all SAs rolled up

View can be customized to needs

Add accounts to Favorites

Sort Account Type

Sort by End Date

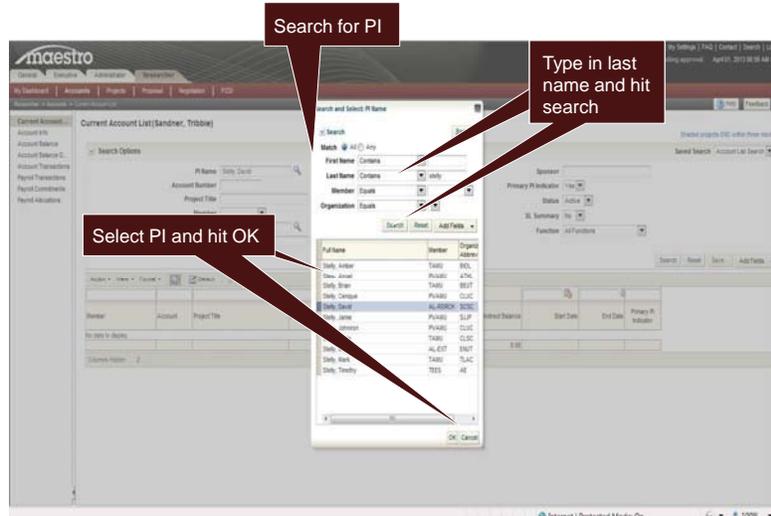
Sort by Sponsor

Account	Member	Project Title	Department	Total Balance (Real Time)	Direct Balance	Primary PI Indicator	Start Date	End Date	Sponsor	Status
1100000	100	AL-RSRFy15 Vice Chancellor Ag R&G	DPCH	-816,679.75	-816,679.75	No			Not Sponsored	Active
1100000	100	AL-RSRFy15	DPCH	-21,177.09	-21,177.09	No			Not Sponsored	Active
1120000	180	AL-RSRFy15	VDEN	-72,004.00	-72,004.00	No			Not Sponsored	Active
1120000	150	AL-RSRFy15	VPAT	0.00	0.00	No			Not Sponsored	Active
1200000	100	AL-RSRFy14	TAES	0.00	0.00	No			Not Sponsored	Active
				-909,860.84	-909,860.84					

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Searching for PI's accounts - step 1 of 2

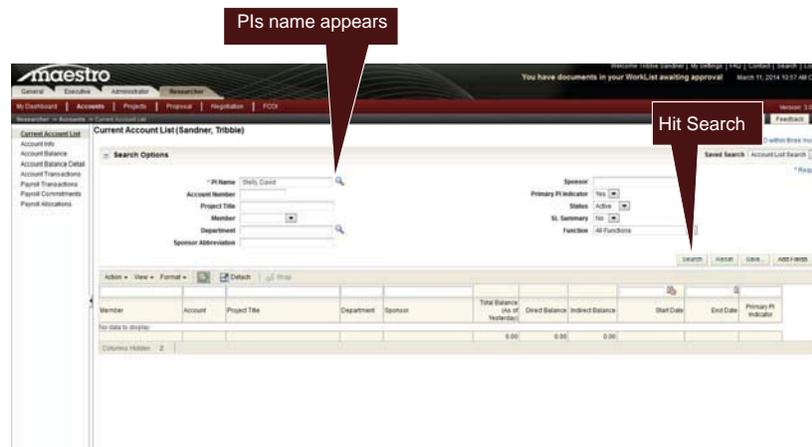
(use to find someone else's account only)



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Step 1 of 2

Searching for PI's accounts- step 2 of 2.



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Step 2 of 2

Adding accounts to Favorites

Current Account List (sandner, tribbie)

Search Options

PI Name: Sandner, Tribbie

Account Number

Project Title

Member

Department

Sponsor Abbreviation

Sponsor

Primary PI Indicator: All

Status: Active

SL Summary: No

Function: All Functions

Account	Member	Project Title	Department	Total Balance (Real Time)	Direct Balance	Primary PI Indicator	Start Date	End Date	Sponsor	Status
11000007000	AL-RS	Fy15 Vice Chancellor Ag R&G	DPCH	-816,679.75	-816,679.75	No			Not Sponsored	Active
11000020510	AL-RSR	Fy15	DPCH	-21,177.09	-21,177.09	No			Not Sponsored	Active
11200007180	AL-RSR	Fy15	VGEN	-72,004.00	-72,004.00	No			Not Sponsored	Active
11200066850	AL-RSR	Fy15	VPAT	0.00	0.00	No			Not Sponsored	Active
12000107000	AL-RS	Fy15	TAES	0.00	0.00	No			Not Sponsored	Active
				-909,860.84	-909,860.84					

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Favorite Account Screen

Current Account List

Favorites

Shaded projects END within three months

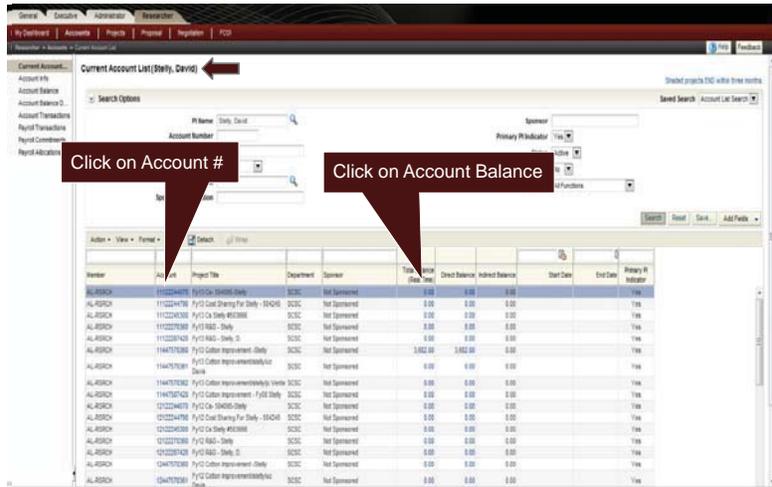
PI Name	Member	Department	Account	Total Balance (Real Time)	Primary PI Indicator	End Date	Project Title	Sponsor	Status	Direct Balance	Indirect Balance
Stelly, David	AL-RSR	SCSC	110000374	0.00	Yes		Fy15 R&G - Stelly, D.	Not Sponsored	Active	0.00	0.00
Sandner, Tribbie	AL-RSR	VPAT	112000098	0.00	No		Fy15	Not Sponsored	Active	0.00	0.00
Sandner, Tribbie	AL-RSR	DPCH	110000098	-21,177.09	No		Fy15	Not Sponsored	Active	-21,177.09	0.00
				-21,177.09						-21,177.09	0.00

You can select any account you have access to.

To remove the account, select the line and hit delete.

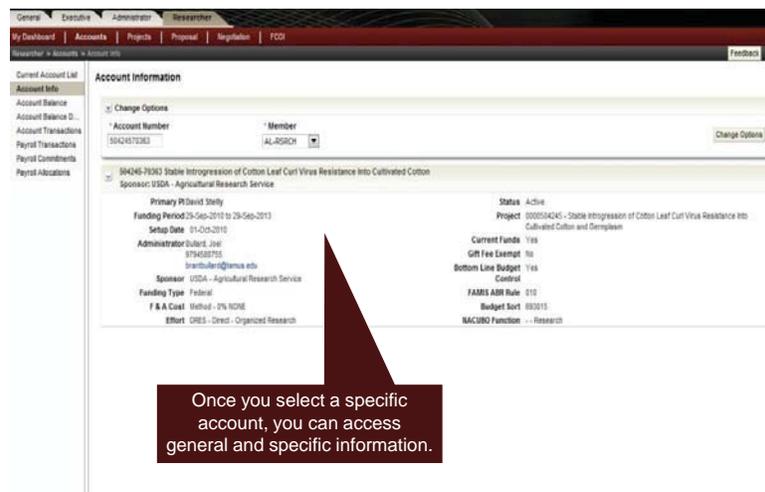
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Ways to get to account information:
2 options: Account # or Account Balance



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After you click on Account #.



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After you click on Account Balance.

Allows you to change dates of information.

Allows you to drill down to specific expense categories and see related charges.

Maestro Category	Budget as of (Apr2013)	Expenditures as of (Apr2013)	Period Expenditure (Jan2013 to Apr2013)	Encumbrance as of (Apr2013)	Balance as of (Apr2013)
Unallocated Budget	0.00	0.00	0.00	0.00	0.00
Salaries	64,339.78	29,707.06	9,794.87	28,232.78	6,308.96
Wages	10,287.54	10,287.54	0.00	0.00	0.00
Benefits	27,675.19	7,440.81	0.00	6,450.98	23,779.58
Trent	18,784.08	8,074.08	0.00	0.00	4,118.58
Reimburs	21,877.07	2,887.29	0.00	8,263.00	19,902.96
Other Expenses	18,202.22	8,838.48	0.00	102.81	7,373.13
Scholarships and Fellowships	0.00	0.00	0.00	0.00	0.00
Participant Costs	0.00	0.00	0.00	0.00	0.00
Subcontracts	0.00	0.00	0.00	0.00	0.00
Capital Outlay	1,187.00	0.00	0.00	0.00	0.00
Budget Reserves	0.00	0.00	0.00	0.00	0.00
Revised Cost	0.00	0.00	0.00	0.00	0.00
Direct Only Total	172,332.46	66,811.9			
Account Total	172,332.46	66,811.9			

Note: Viewing Encumbrances is the same process.

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Drilling down on transactions

Allows you to drill down to sub codes

Subcode	Subcode Title	Maestro Category	Expenditure
8020	Supplies-Prof	Supplies	0.00
8010	Supplies - Office General	Supplies	112.09
8011	Supplies - Paper Goods & Janitorial	Supplies	47.32
8013	Supplies - Office	Supplies	1,912.38
8020	Fuels and Lubricants	Supplies	88.87
8040	Chemicals & Glass	Supplies	0.80
8025	Farm, Ranch and Nursery	Supplies	104.76
8068	Parts - Machinery and Equipment	Supplies	97.46
8079	Shop and Industrial	Supplies	
8080	Furniture & Fixtures	Supplies	
8700	Office Furn and Eq	Supplies	
8703	Shop and Indust Eq	Supplies	
8705	Uniforms and Cost	Supplies	
			2,392.83

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Viewing Famis entry for a specific transaction

File Download

Do you want to open or save this file?

Name: FAMIS_PurchReport_L118901.pdf
Type: Adobe Acrobat Document
From: maestro.tamusc.edu

Open Save Cancel

While files from the Internet can be downloaded to your computer, some files can potentially harm your computer. If you do not trust the source, do not open or save this file.

Click on document #, allows you to view specific documentation for a charge.

Transaction Date	Transaction Description	Debit	Credit	Balance	Category
07-Mar-2013	TEXAS AGRICULTURE RESEA				
07-Mar-2013	TEXAS AGRICULTURE RESEA				
07-Mar-2013	BUSINESS				
13-Mar-2013	TEXAS AGRICULTURE RESEA				
29-Mar-2013	PHENIX RESEARCH PROC				
29-Mar-2013	PHENIX RESEARCH PROC	14.87	1142274		Supplies - Research
29-Mar-2013	PHENIX RESEARCH PROC	400.00	1146274		Supplies - Research
29-Mar-2013	PHENIX RESEARCH PROC	1,812.30			

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Seeing Payroll transactions for the account.

Payroll Transaction

Change Options

Account Number: 55424572363 Member: ALPSCA Start: January 2013 End: March 2013 Sub Code: [blank]

Sponsor: USDA - Agricultural Research Service - Priority PI: Stelly, David

Name	PIN	% ETRN	Sub Code	Pay Year/End	Amount	Transaction Date	Pay Period	Pay Check
From, Sandra N.	A3811	100	1000 - Tax Withholding	2000/14	-88.00	1/8/2013	10/31/2012	1/8/2013
Payroll, Reagan C.	A80000722	100	1000 - Unemployment Compensation Insurance	2000/14	2.4	1/8/2013	10/31/2012	1/8/2013
Halley, Dawn B.	A80000000	100	1140 - Wages - Student	2000/14	-470	1/8/2013	12/12/2012	1/8/2013
Payroll, Reagan C.	A80000722	100	1000 - FICA Contributions (Class)	2000/14	-10.81	1/8/2013	10/31/2012	1/8/2013
From, Sandra N.	A3811	100	1010 - Self-Insured - Professional	2000/14	-258.40	1/8/2013	10/31/2012	1/8/2013
Payroll, Reagan C.	A80000722	100	1000 - FICA Contributions (Class)	2000/14	-42.52	1/8/2013	11/4/2012	1/8/2013
From, Sandra N.	A3811	100	1000 - FICA Contributions (Class)	2000/14	-103.06	1/8/2013	10/31/2012	1/8/2013
Payroll, Reagan C.	A80000722	100	1000 - Withholders Compensation Assessments	2000/14	-1.00	1/8/2013	10/31/2012	1/8/2013
From, Sandra N.	A3811	100	1000 - Withholders Compensation Assessments	2000/14	-3.96	1/8/2013	8/30/2012	1/8/2013
Halley, Dawn B.	A80000000	100	1000 - Unemployment Compensation Insurance	2000/12	1.40	1/8/2013	1/8/2013	1/8/2013
Total					-819.20			

Allows you to see payroll charges

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Seeing Payroll encumbrances for the project for budgeted positions only.

Payroll Commitment - (Real Time Balances)

Change Options: Account Number: 5542457330, Member: AL-RSCH, Start: March 2013, End: April 2013, PW: []

SI Summary: No

Project: 554245-7330 Stable Integration of Cotton Leaf Curl Virus Resistance into Cultivated Cotton
Sponsor: USDA - Agricultural Research Service - Primary PI: Stelly, David

Position	Name	Budget / Wage	Salary Amount	Longevity Amount	Benefit Amount
A00111	Sandra Poon	0	12,692.78	540.00	2,170.55
A01962	Bo Liu	0	15,000.00	0.00	4,278.44
A01977	Kevin Hoegemauer	0	0.00	0.00	0.00
A01977	Kevin Hoegemauer	0	37,692.78	540.00	6,450.99

Allows you to see payroll commitments on this account.

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Seeing Payroll Allocations for all accounts

Payroll Allocations (Stelly, David)

Search: [] Advanced Saved Search Payroll

Match: All Atty System Member: All Account: []

Action: View Format Detach Wipe

First Name	Last Name	System Member	Account	Account Title	PI#	Effort (%)	Working Months Remaining	Monthly Pay	Pay Remaining	Longevity Remaining	Benefits Remaining	Effective Date
Andrea	Borges Val.	AL-RSCH	5542457330	Stable Integration of Cotton Leaf Curl Virus Resistance into Cultivated Cotton	A0011855	100%	5.31	502.32	2,790.04	0.00	12.00	05/14/13
Bo	Liu	AL-RSCH	5542457330	Stable Integration of Cotton Leaf Curl Virus Resistance into Cultivated Cotton	A01962	100%	0.00	3,000.00	15,000.00	0.00	4,287.23	01/14/13
David	Stelly	AL-RSCH	1112224330	Fy13 Ca Stelly #10396	A01363	1%	0.00	94.25	471.26	0.00	94.48	01/14/13
David	Stelly	AL-RSCH	1112227930	Fy13 R&D - Stelly	A01363	19%	0.00	1,760.74	0.00	0.00	0.00	01/14/13
David	Stelly	AL-RSCH	11122244790	Fy13 Cost Sharing For Stelly - 554245	A01363	20%	5.00	1,804.99	9,424.95	0.00	1,809.78	01/14/13
David	Stelly	AL-RSCH	11122244790	Fy13 Ca - 554245 - Stelly	A01363	10%	0.00	942.80	0.00	0.00	0.00	01/14/13
David	Stelly	AL-RSCH	1112227930	Fy13 R&D - Stelly	A01363	29%	0.00	2,733.24	13,666.20	0.00	2,740.14	01/14/13
Dwain	Kelley	AL-RSCH	5542457330	Stable Integration of Cotton Leaf Curl Virus Resistance into Cultivated Cotton	A00100353	100%	5.33	420.00	2,340.00	0.00	10.53	01/14/13
Dwain	Kelley	AL-RSCH	4983372930	Integration of Genes from Arabidopsis thaliana to Increase Genetic Diversity for Cotton	A00100353	100%	0.00	420.00	0.00	0.00	0.00	01/14/13
Dwayne	Rasala	AL-RSCH	1112227930	Fy13 R&D - Stelly	A01413	38%	5.00	1,813.32	8,068.00	870.00	2,675.17	01/14/13
TOTAL								94,008.90	2,940.00		19,231.12	

Payroll Allocations-

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