Maestro Training-
General Overview

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What is Maestro?

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

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
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

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.
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

How does it work?

Use your SSO Log-in info

Gives funding opportunities
Change between Accounts & Projects

Help, Gives more information about screens.

If you are having an issue with a screen, use Feedback to help us improve

General Tab

Approve Worklist Items

FAQs

Search Features

Administrative Services
Researchers Tab - My Profile

- Provides Specific performance measures

My Settings - Step By Step Instructions provided separately.

- Add your website
- Change where you land when you log in
- Add alternate approver
- Add Delegate
**Add Keywords for Funding Opportunities and Keyword Searches**

Administrative Services

**Researcher Tab-**

**Area of Interest**

Administrative Services

**Researcher Tab-**

**Account Search**

Administrative Services
Searching for PI’s accounts - step 1 of 2

(Use to find someone else’s account only)

Search for PI

Type in last name and hit search

Select PI and hit OK

Step 1 of 2

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

PI’s name appears

Hit Search

Step 2 of 2
Adding accounts to Favorites

Select the account you want to add to your list of favorites.

Click on the Star to add to favorites.

Favorite Account Screen

You can select any account you have access to.

To remove the account, select the line and hit delete.
Ways to get to account information:
2 options: Account # or Account Balance

After you click on Account #.

Once you select a specific account, you can access general and specific information.
After you click on Account Balance.

Drilling down on transactions

Administrative Services

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

Administrative Services

Allows you to drill down to sub codes

Note: Viewing Encumbrances is the same process.
Drilling down on transactions con’t.

Administrative Services

Allows you to see each charge for the categories and sub codes.

FAMIS charges have PO and Document #s. Pro Card are X transactions.

Drilling down on transactions con’t.

Administrative Services

Can be exported to excel.

Clear out the category and sub code, you can see ALL transactions for specific period of time.
Viewing Famis entry for a specific transaction

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

Seeing Payroll transactions for the account.

Allows you to see payroll charges.
Seeing Payroll encumbrances for the project for budgeted positions only.

Allows you to see payroll commitments on this account.

Seeing Payroll Allocations for all accounts
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