Maestro Overview for Departments

June 2020
Maestro Objectives

- *Provide researchers* with timely and accurate information needed to manage their research activities and to establish collaborations.

- *Streamline research administration* processes to minimize inefficiencies and improve turnaround time.

- Publish up to date *research key performance indicators* for all TAMUS departments, institutions and Board of Regents.
Maestro Statistics in FY19

**Access**
- 440,000 logins
- 15,000 different users
- 7,000 researchers

**Accomplishments**
- 15 major releases
- Over 400 improvements/bugs completed
- Over 100 training sessions conducted
- 11 universities and 8 agencies supported
Maestro 8.0 Released on 5/30/2020

- Maestro migration to Oracle Cloud at Customer infrastructure that resulted in improvements in speed and stability
- Updated appearance for a more consistent feel and look
- Content resized and adjusted to support different screen sizes including content rendering on mobile devices
Maestro Training

- Home> About Maestro> Training> Scheduled Classes

Training for Maestro General Overview at 9:30-10:30 on
- June 24, 2020 - Register
- July 20, 2020 - Register
- August 17, 2020 - Register

Training for Researcher Portal Users at 1:30-3:00 on
- June 24, 2020 - Register
- July 15, 2020 - Register
- August 19, 2020 - Register

Training for Executive Portal Users at 9:30-11:30 on
- June 23, 2020 - Register
- July 21, 2020 - Register
- August 18, 2020 - Register

Training for Proposal Administrators at 9:00-12:00 on
- June 24, 2020 - Register
- July 15, 2020 - Register
- August 19, 2020 - Register

Training for Project Administrators at 1:30-4:30
- June 22 and 23, 2020 - Register
- July 19 and 21, 2020 - Register
- August 17 and 18, 2020 - Register

Training for Proposal/Project Viewers at 1:30-3:30 on
- June 25, 2020 - Register
- July 16, 2020 - Register
- August 20, 2020 - Register

Training for Maestro Security/User Administrators at 8:30-9:30 on
- June 25, 2020 - Register
- July 16, 2020 - Register
- August 20, 2020 - Register

Training for Research Compliance Officials at 10:00-11:00 on
- June 25, 2020 - Register
- July 16, 2020 - Register
- August 20, 2020 - Register
Researcher Portal

How can I help researchers?
Researcher Portal Access

- **Researcher Reviewer** role required for either specified PIs or departments.
Researcher Dashboard Alerts

- **Proposal Alerts**
  - Proposals with submission due within 14 days

- **Project Alerts**
  - Authorization for compliance item is missing
  - Compliance item expiring within 30 days
  - Technical Deliverable past due, not completed by the responsible person.
  - Missing FCOI annual disclosure for Investigator on the project.
  - Budget Period ending in 90 days with positive balance without Carry Forward possibility

- **Account Alerts**
  - Active accounts with a negative balance
  - Active accounts with a positive balance ending in 90 days
  - Active accounts frozen for activity
Account Monthly Statements

- Last 12 months displayed
- Only accounts with expenditures for selected month are listed
- Payroll is separated from other expenditures
- Displays details by clicking link on account or expand view icon

### Monthly Statement (David Stelly)

**MAY-2020**

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Member</th>
<th>Name</th>
<th>Sponsor</th>
<th>Expenditure</th>
<th>End Date</th>
<th>Select Rows for Export/Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>121222-70360</td>
<td>AL-RSRCH</td>
<td>Fy20 R&amp;G - Stelly</td>
<td>State of Texas - State Ap...</td>
<td>2,601.97</td>
<td></td>
<td>□</td>
</tr>
<tr>
<td>124208-70360</td>
<td>AL-RSRCH</td>
<td>New Cropping Fov4 - Stelly</td>
<td>State of Texas - State Ap...</td>
<td>975.09</td>
<td></td>
<td>□</td>
</tr>
<tr>
<td>130014-05894</td>
<td>TAMU</td>
<td>Cs -Pi Stelly 06-505894 U...</td>
<td>State of Texas - State Ap...</td>
<td>317.24</td>
<td>5/30/2021</td>
<td>□</td>
</tr>
</tbody>
</table>

Total Monthly Expenditure: **19,585.06**
Researcher Delegates

- **Researcher can assign delegate** (in Personal Settings) for technical deliverables upload and completion in Maestro
- Delegates need to have **Research Administrative Assistant** role

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**Delegate Settings**

<table>
<thead>
<tr>
<th>Delegate</th>
<th>Member</th>
<th>Organization</th>
<th>Delegate Access</th>
<th>Certify</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tye Rougas</td>
<td>TAMU</td>
<td>Research Information</td>
<td>Deliverable</td>
<td></td>
</tr>
</tbody>
</table>

I am responsible for all the actions of the delegate performed with this access

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June 18, 2020
Administrative Portal

How to find my department proposal/project data?

June 18, 2020
Proposal Search

- **Proposal Viewer** role required for specified department

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June 18, 2020
Proposal Reports

Departmental Cost Sharing for Proposal

![Proposal Reports](image.png)

<table>
<thead>
<tr>
<th>Proposal Number</th>
<th>Cs Member</th>
<th>Cs Organization</th>
<th>Cs Type Description</th>
<th>Cs Source</th>
<th>Cs Account</th>
<th>Direct Amount</th>
<th>Indirect Amount</th>
<th>Total Amount</th>
<th>Lead Member Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004787</td>
<td>TAMU</td>
<td>Chemistry</td>
<td>Salaries/Fringes</td>
<td></td>
<td>5601</td>
<td>3401</td>
<td></td>
<td>10002</td>
<td>TEES-Civil Engineering</td>
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<tr>
<td>2004739</td>
<td>TAMU</td>
<td>Chemistry</td>
<td>Salaries/Fringes</td>
<td></td>
<td>2323</td>
<td>1196</td>
<td></td>
<td>3519</td>
<td>TAMU-Chemistry</td>
</tr>
</tbody>
</table>
Project/Account Modules

**Project Viewer** role required for specified department

- Project Search
- Billing Project Search
- Terms and Condition Search
- Action Search
- Integrity Check Search
- Deliverable Search
- Award/Modification Search
- Sponsored Invoice Search and Reports
- Account Search and Reports
Project Search

- Search by any field listed and fields displayed when ADD FIELD button is clicked
Billing Project Search

<table>
<thead>
<tr>
<th>Maestro ID</th>
<th>Billing Project Member</th>
<th>Billing Project</th>
<th>PI</th>
<th>Billing Project Sponsor</th>
<th>Billing Project End Date</th>
<th>Billing Project Status</th>
<th>Calculated Average Monthly Expenses</th>
<th>Budget Up To Date</th>
<th>Expenses Up To Date</th>
<th>Revenue Actuals Up To Date</th>
<th>% Money Spent</th>
</tr>
</thead>
<tbody>
<tr>
<td>M1601561</td>
<td>TEES</td>
<td>5052000000</td>
<td>Darren Hartl</td>
<td>Regents of the University</td>
<td>31-Dec-2020</td>
<td>Active</td>
<td>18,473.26</td>
<td>480,000.00</td>
<td>467,155.62</td>
<td>464,830.52</td>
<td>97.32</td>
</tr>
<tr>
<td>M1603064</td>
<td>TEES</td>
<td>5099600000</td>
<td>Diego Donzis</td>
<td>National Science Found.</td>
<td>31-Jan-2021</td>
<td>Active</td>
<td>1,620.42</td>
<td>326,155.00</td>
<td>306,690.96</td>
<td>306,690.96</td>
<td>94.04</td>
</tr>
<tr>
<td>M1603306</td>
<td>TEES</td>
<td>5062800000</td>
<td>Suman Chakrav...</td>
<td>National Science Found...</td>
<td>31-Aug-2020</td>
<td>Active</td>
<td>0.00</td>
<td>499,996.00</td>
<td>499,993.76</td>
<td>499,993.76</td>
<td>100.00</td>
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<tr>
<td>M1701452</td>
<td>TEES</td>
<td>5079200000</td>
<td>Diego Donzis</td>
<td>DOD-Air Force-Office of...</td>
<td>31-Jul-2020</td>
<td>Active</td>
<td>16,240.56</td>
<td>608,705.65</td>
<td>608,705.65</td>
<td>608,705.65</td>
<td>93.00</td>
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</table>
# Terms and Condition Search

## Terms And Condition Search Criteria

<table>
<thead>
<tr>
<th>Terms and Condition Item</th>
<th>Value</th>
<th>Comment</th>
</tr>
</thead>
</table>

## Project Search Criteria

<table>
<thead>
<tr>
<th>Match</th>
<th>Project Status</th>
<th>Lead Member</th>
<th>Lead Organization</th>
<th>Administrative Organization</th>
<th>Instrument Type</th>
<th>Function</th>
<th>Sponsor</th>
<th>Sponsor Type</th>
<th>Prime Sponsor</th>
<th>Prime Type</th>
<th>Negotiator</th>
<th>Administrator</th>
<th>Sponsor Type</th>
<th>Project Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Equals</td>
<td>TAMSU</td>
<td>Mechanical Engineering</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>Active</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>X</td>
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<td></td>
</tr>
</tbody>
</table>

## Project Search Table

<table>
<thead>
<tr>
<th>ID</th>
<th>Lead Member</th>
<th>Lead Organization</th>
<th>Sponsor</th>
<th>PI</th>
<th>Negotiator</th>
<th>Administrator</th>
<th>Sponsor Type</th>
<th>Project Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>M2001537</td>
<td>TAMU</td>
<td>Mechanical Engineer</td>
<td>Office of the Governor</td>
<td>Ali Erdemir</td>
<td></td>
<td>Katherine Temple</td>
<td>State Agency</td>
<td>Active</td>
</tr>
<tr>
<td>M2001051</td>
<td>TAMU</td>
<td>Mechanical Engineer</td>
<td>Interio Integrity Services</td>
<td>Joanna Tsann</td>
<td>Matthew Hilgen</td>
<td>Katherine Temple</td>
<td>Private</td>
<td>Active</td>
</tr>
</tbody>
</table>
### Action Search

#### Search

- **Maestro Id**: Starts with
- **Administrator**: Equals
- **Project Status**: Equals
- **Lead Member**: Equals
- **Lead Organization**: Equals
- **PI**: Equals
- **Instrument Type**: Equals
- **Administrative Organization**: Equals
- **Action Type**: Equals
- **Sponsor**: Equals
- **Sponsor Award Number**: Equals
- **Action Amount**: Greater than
- **Awarded Amount**: Equals
- **Action Completed on**: After
- **Status**: Starts with
- **Status Date**: Equals

#### Table

<table>
<thead>
<tr>
<th>Maestro Id</th>
<th>Seq</th>
<th>Action Type</th>
<th>Title</th>
<th>Sponsor</th>
<th>Action Amount</th>
<th>Awarded Amount</th>
<th>Project Status</th>
<th>Status Date</th>
<th>Action Start Date</th>
<th>PI</th>
</tr>
</thead>
<tbody>
<tr>
<td>M1803915</td>
<td>3</td>
<td>Continuation</td>
<td>Lattice-Confin...</td>
<td>DOE-Office Of Science</td>
<td>150,000.00</td>
<td></td>
<td>Active</td>
<td>17-Jun-2020</td>
<td>01-Sep-2020</td>
<td></td>
</tr>
<tr>
<td>M2002079</td>
<td>1</td>
<td>New Award</td>
<td>Collaborative Research</td>
<td>National Science Foundation</td>
<td>345,000.00</td>
<td>345,000.00</td>
<td>Active</td>
<td>05-May-2020</td>
<td>01-Sep-2020</td>
<td>James Batteas</td>
</tr>
<tr>
<td>M2002189</td>
<td>1</td>
<td>New Award</td>
<td>CAS: Synthetic Methodol...</td>
<td>National Science Foundation</td>
<td>700,000.00</td>
<td>700,000.00</td>
<td>Active</td>
<td>18-May-2020</td>
<td>01-Aug-2020</td>
<td>Karen Wooley</td>
</tr>
<tr>
<td>M1401761</td>
<td>13</td>
<td>Renewal</td>
<td>Elucidation of Enzyme Re...</td>
<td>Robert A. Welch Foundation, the</td>
<td>240,000.00</td>
<td>240,000.00</td>
<td>Active</td>
<td>27-May-2020</td>
<td>01-Jun-2020</td>
<td>Frank Rausch</td>
</tr>
<tr>
<td>M1401769</td>
<td>12</td>
<td>Renewal</td>
<td>Tellurium(V) Lewis Acids</td>
<td>Robert A. Welch Foundation, the</td>
<td>240,000.00</td>
<td>240,000.00</td>
<td>Active</td>
<td>20-May-2020</td>
<td>01-Jun-2020</td>
<td>Francois Gabbi</td>
</tr>
<tr>
<td>M20022235</td>
<td>1</td>
<td>New Award</td>
<td>Mapping the Structure an...</td>
<td>Robert A. Welch Foundation, the</td>
<td>240,000.00</td>
<td>240,000.00</td>
<td>Active</td>
<td>22-May-2020</td>
<td>01-Jun-2020</td>
<td>Daniel Tabor</td>
</tr>
<tr>
<td>M1901891</td>
<td>2</td>
<td>Continuation</td>
<td>Determination of Fundam...</td>
<td>National Science Foundation</td>
<td>150,000.00</td>
<td></td>
<td>Active</td>
<td>29-May-2020</td>
<td>01-Aug-2019</td>
<td>Karen Wooley</td>
</tr>
<tr>
<td>M1901891</td>
<td>3</td>
<td>Continuation</td>
<td>Determination of Fundam...</td>
<td>National Science Foundation</td>
<td>450,000.00</td>
<td></td>
<td>Active</td>
<td>11-Jun-2020</td>
<td>01-Aug-2019</td>
<td>Karen Wooley</td>
</tr>
</tbody>
</table>
Integrity Check Search

June 18, 2020
Deliverable Search

### Deliverable Search

**Search**

- **Match**: All
- **Lead Member**: Equals
- **Lead Organization**: Equals
- **Category**: equals Technical Report
- **Type**: equals Project Summary Report
- **Recipient**: Starts with
- **Status**: Equals Pending

**Results**

<table>
<thead>
<tr>
<th>Category</th>
<th>Type</th>
<th>Recipient</th>
<th>Recipient Due Date</th>
<th>Status</th>
<th>Responsible Person</th>
<th>Modification Pending</th>
<th>Maestro Id</th>
<th>Lead Member</th>
<th>Administrator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical Report</td>
<td>Project Summary Report</td>
<td>Department of Transportation-Feder...</td>
<td>22-May-2020</td>
<td>Pending</td>
<td>Beverly Kuhn</td>
<td></td>
<td>M1900376</td>
<td>TTI</td>
<td>Victoria Henry</td>
</tr>
<tr>
<td>Technical Report</td>
<td>Project Summary Report</td>
<td>Department of Transportation-Feder...</td>
<td>14-Sep-2020</td>
<td>Pending</td>
<td>Beverly Kuhn</td>
<td></td>
<td>M1900376</td>
<td>TTI</td>
<td>Victoria Henry</td>
</tr>
<tr>
<td>Technical Report</td>
<td>Project Summary Report</td>
<td>Department of Transportation-Feder...</td>
<td>30-Sep-2020</td>
<td>Pending</td>
<td>Beverly Kuhn</td>
<td></td>
<td>M1900451</td>
<td>TTI</td>
<td>Victoria Henry</td>
</tr>
<tr>
<td>Technical Report</td>
<td>Project Summary Report</td>
<td>Department of Transportation-Feder...</td>
<td>31-Dec-2020</td>
<td>Pending</td>
<td>Beverly Kuhn</td>
<td></td>
<td>M1900376</td>
<td>TTI</td>
<td>Victoria Henry</td>
</tr>
</tbody>
</table>
Award/Modification Search (Negotiation History)

June 18, 2020
## Sponsored Invoice Search

### Search

- **Invoice Number**: Equals
- **Invoice Status**: Equals
- **Maestro Id**: Starts with
- **Billing Project**: Starts with
- **Sponsor Name**: Equals
- **Administrative Organization**: Equals

### Basic Criteria

- **Lead Member**: Equals
- **AR Accountant**: Equals
- **Project Administrator**: Equals
- **Net Amount**: Greater than
- **Number Of Days Late**: Between

### Data Table

<table>
<thead>
<tr>
<th>Invoice Number</th>
<th>Invoice Status</th>
<th>Lead Member</th>
<th>Maestro Id</th>
<th>Billing Project</th>
<th>Period Due</th>
<th>Total</th>
<th>Net Amount</th>
<th>Retained Amount</th>
<th>Original Bill Date</th>
<th>Current Due Date</th>
<th>Sponsor Name</th>
<th>AR Accountant</th>
</tr>
</thead>
<tbody>
<tr>
<td>R030045</td>
<td>Sent to sponsor</td>
<td>TAMU</td>
<td>M1901928</td>
<td>4236620000</td>
<td>Current</td>
<td>2,889.45</td>
<td>2,889.45</td>
<td>0.00</td>
<td>31-Mar-2020</td>
<td>17-Jun-2020</td>
<td>American Heart...</td>
<td>Jessica Daniels</td>
</tr>
<tr>
<td>R030245</td>
<td>Sent to sponsor</td>
<td>TAMU</td>
<td>M1901928</td>
<td>4236620000</td>
<td>Current</td>
<td>3,229.74</td>
<td>3,229.74</td>
<td>0.00</td>
<td>30-Apr-2020</td>
<td>17-Jun-2020</td>
<td>American Heart...</td>
<td>Jessica Daniels</td>
</tr>
<tr>
<td>R029834</td>
<td>Sent to sponsor</td>
<td>TAMU</td>
<td>M1901928</td>
<td>4236620000</td>
<td>31-60 Days Over...</td>
<td>2,013.57</td>
<td>2,013.57</td>
<td>0.00</td>
<td>29-Feb-2020</td>
<td>25-Apr-2020</td>
<td>American Heart...</td>
<td>Jessica Daniels</td>
</tr>
<tr>
<td>R030437</td>
<td>Pending</td>
<td>TAMU</td>
<td>M1901928</td>
<td>4236620000</td>
<td>Current</td>
<td>10,207.28</td>
<td>10,207.28</td>
<td>0.00</td>
<td>31-May-2020</td>
<td>30-Jun-2020</td>
<td>American Heart...</td>
<td>Jessica Daniels</td>
</tr>
</tbody>
</table>
Sponsored Invoice Reports

Invoice Collection Log
# Sponsored Invoice Reports

Pending Expenditure Adjustments

<table>
<thead>
<tr>
<th>Member</th>
<th>Lead Organization</th>
<th>Admin Organization</th>
<th>Maestro Id</th>
<th>Project Number</th>
<th>Title</th>
<th>Lead Pi</th>
<th>Billing Project Status</th>
<th>Sponsor Name</th>
<th>Ar Accountant Name</th>
<th>Pending Adjustments</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAMU</td>
<td>Chemistry</td>
<td>SRS</td>
<td>M20000...</td>
<td>4206910000</td>
<td>Resource for N...</td>
<td>David Russell</td>
<td>Active</td>
<td>Ohio State Univ...</td>
<td>Jessica Daniels</td>
<td>-6783.41</td>
</tr>
</tbody>
</table>
### Active Sponsored Accounts Search

**Search**
- **Match**: All or Any
- **Member**: Equals TAMU
- **Admin Org**: Equals
- **SL Account**: Starts with
- **SA Account**: Starts with
- **Old Account**: Starts with
- **Account Title**: Contains
- **Fiscal Year**: Equals 2020
- **Primary Organization**: Equals Chemistry

**Sponsor Name**: Contains
- **Maestro Project**: Starts with
- **Billing Project**: Starts with
- **Billing Project Status**: Equals
- **Responsible Person**: Equals
- **Accountant Name**: Contains
- **Freeze Account Flag**: Equals Yes
- **Transferred To FAMIS**: Equals

**Action**
- Search
- Reset
- Save...
- Add Fields

### Table

<table>
<thead>
<tr>
<th>SL Account</th>
<th>SA Account</th>
<th>Member Abbreviation</th>
<th>Fiscal Year</th>
<th>Account Title</th>
<th>Sponsor Name</th>
<th>Maestro Project</th>
<th>Billing Project</th>
<th>Primary Organization</th>
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<tbody>
<tr>
<td>401051</td>
<td>00000</td>
<td>TAMU</td>
<td>2020</td>
<td>Nsf-Gyroscope Like Metal Complexes</td>
<td>National Science Foundation</td>
<td>M1603034</td>
<td>4010510000</td>
<td>Chemistry</td>
</tr>
<tr>
<td>401051</td>
<td>00001</td>
<td>TAMU</td>
<td>2020</td>
<td>Nsf - Gyroscope Like Metal Complex</td>
<td>National Science Foundation</td>
<td>M1603034</td>
<td>4010510000</td>
<td>Chemistry</td>
</tr>
<tr>
<td>401051</td>
<td>00002</td>
<td>TAMU</td>
<td>2020</td>
<td>Nsf - Grad Support - Gyroscope Like</td>
<td>National Science Foundation</td>
<td>M1603034</td>
<td>4010510000</td>
<td>Chemistry</td>
</tr>
<tr>
<td>401081</td>
<td>00000</td>
<td>TAMU</td>
<td>2020</td>
<td>Nsf-Unveiling Enigmatic Biosynthetic</td>
<td>National Science Foundation</td>
<td>M1603050</td>
<td>4010810000</td>
<td>Chemistry</td>
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</tbody>
</table>
### List of Sponsored Research Accounts in Department

<table>
<thead>
<tr>
<th>Responsible Person</th>
<th>Account Number</th>
<th>SS Short Title</th>
<th>End Date</th>
<th>Billing Project</th>
<th>Billing Project Status</th>
<th>Project Administrator</th>
<th>Lead PI</th>
<th>Maestro Id</th>
<th>Account Balance Direct</th>
<th>Account Balance Indirect</th>
<th>Account Balance Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Honguai Zhou</td>
<td>446292-00001</td>
<td>Cash Matching...</td>
<td>30-Sep-2018</td>
<td>4462920000</td>
<td>Active</td>
<td>Shelly Grassinger</td>
<td>Honguai Zhou</td>
<td>M1700168</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
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<tr>
<td>Lisa Perez</td>
<td>420021-00001</td>
<td>Biophysical Co...</td>
<td>30-Apr-2020</td>
<td>4200210000</td>
<td>Active</td>
<td>Shelly Grassinger</td>
<td>Lisa Perez</td>
<td>M1000458</td>
<td>0.59</td>
<td>0.10</td>
<td>0.69</td>
</tr>
<tr>
<td>Sarbajit Banerjee</td>
<td>454601-00001</td>
<td>Super-Slick Co...</td>
<td>31-May-2020</td>
<td>4546010000</td>
<td>Active</td>
<td>Shelly Grassinger</td>
<td>Sarbajit Banerjee</td>
<td>M1002584</td>
<td>3,054.79</td>
<td>339.40</td>
<td>3,394.19</td>
</tr>
<tr>
<td>Peng Zhang</td>
<td>413271-00001</td>
<td>A Novel Metal...</td>
<td>30-Jun-2020</td>
<td>4132710000</td>
<td>Active</td>
<td>Shelly Grassinger</td>
<td>Peng Zhang</td>
<td>M1700754</td>
<td>649.37</td>
<td>670.92</td>
<td>1,320.29</td>
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<tr>
<td>Peng Zhang</td>
<td>413271-01001</td>
<td>50% Wt - A Nov...</td>
<td>30-Jun-2020</td>
<td>4132710000</td>
<td>Active</td>
<td>Shelly Grassinger</td>
<td>Peng Zhang</td>
<td>M1700754</td>
<td>10,803.58</td>
<td>5,034.89</td>
<td>15,838.42</td>
</tr>
<tr>
<td>Arthur Lagano...</td>
<td>414591-00001</td>
<td>Development G...</td>
<td>30-Jun-2020</td>
<td>4145910000</td>
<td>Active</td>
<td>Shelly Grassinger</td>
<td>Arthur Lagano..</td>
<td>M1800195</td>
<td>30,485.64</td>
<td>19,717.35</td>
<td>50,152.99</td>
</tr>
<tr>
<td>David Russell</td>
<td>414601-00001</td>
<td>Development G...</td>
<td>30-Jun-2020</td>
<td>4146010000</td>
<td>Active</td>
<td>Shelly Grassinger</td>
<td>David Russell</td>
<td>M1800196</td>
<td>28,452.39</td>
<td>18,455.86</td>
<td>46,908.25</td>
</tr>
<tr>
<td>David Russell</td>
<td>419992-00001</td>
<td>Resource For N...</td>
<td>20-Jun-2020</td>
<td>4199920000</td>
<td>Active</td>
<td>Shelly Grassinger</td>
<td>David Russell</td>
<td>M1900321</td>
<td>408.78</td>
<td>395.16</td>
<td>803.94</td>
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<tr>
<td>David Russell</td>
<td>419912-00001</td>
<td>Resource For N...</td>
<td>20-Jun-2020</td>
<td>4199120000</td>
<td>Active</td>
<td>Shelly Grassinger</td>
<td>David Russell</td>
<td>M1900322</td>
<td>23.06</td>
<td>502.15</td>
<td>525.21</td>
</tr>
</tbody>
</table>
Account Reports

Accounts with Direct or Indirect Deficit
Executive Portal

How to find my department performance data?

Required Role: Executive for Department
How is Proposal Credit granted to Departments in Maestro?

- **Department Credit** - The credit is given 100% to lead member, but split between that member departments based on personnel credit. If personnel department is part of different member that portion is given to lead department.

- **Center Credit** – “Center” as well as “Lead Organization” or “Administer For” organizations are given center credit if those department codes are classified as center/institute

- **Association Credit** - Departments listed in Personnel that do not match lead member can be seen under “Association”. PI ADLOC Departments if different that listed department can also see data through “Association”.

June 18, 2020
How is Award Credit granted to Departments in Maestro?

- **Department Credit** – Departments are given credit for the awards they are directly tied to ("Lead Organization")

- **Center Credit** – “Center” as well as “Lead Organization” or “Administer For” organizations are given center credit if those department codes are classified as center/institute.

- **Association Credit** - Departments listed in Personnel that do not match lead member can be seen under “Association”. PI ADLOC Departments if different that lead member can also see data through “Association”.

June 18, 2020
How is Expenditure Credit granted to Departments in Maestro?

- **Department Credit** – Departments are given credit for the expenditure they are directly tied to (“Primary Organization”)

- **Center Credit** – “Center” as well as “Primary Organization” or “Administer For” organizations are given center credit if those department codes are classified as center/institute

- **Association Credit** - Departments listed in Personnel that do not match lead member can be seen under “Association”. PI ADLOC Departments if different that listed department can also see data through “Association”
Organization Activity

Activity
Comparison
Detail
Sponsor Comparison
Researcher Comparison
Expenditure Categories
Month By Month
Reports
Groups Management

Search Activity
Single Selection
Group Selection
Quick Select
Org Units in My Profile

- CHEM-TAMU-Chemistry
  - BNMR-TAMU-Center For Biological Nuclear Magnetism
  - CCCA-TAMU-Center For Chemical Characterization & Analysis
  - CYCL-TAMU-Cyclotron Institute
  - IAMCS-TAMU-Institute For Applied And Computational Mathematics
  - AMCS-TAMU-Institute For Applied Mathematics And Computation
  - IQS-TAMU-Institute For Quantum Studies
  - ISG-TAMU-Institute For Scientific Computation
  - IITEC-TAMU-Internet 2 Technology Evaluation Center
  - MATH-TAMU-Mathematics

All: CHEM-Chemistry, Organization Activity With Associates

<table>
<thead>
<tr>
<th>Year</th>
<th>Proposal Amount</th>
<th>Award Amount</th>
<th>Action Amount</th>
<th>Direct Expenditures</th>
<th>Indirect Expenditures</th>
<th>Total Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>64,804,319.55</td>
<td>12,450,243.31</td>
<td>9,855,240.67</td>
<td>32,902,677.83</td>
<td>2,199,405.64</td>
<td>35,102,083.47</td>
</tr>
<tr>
<td>2017</td>
<td>70,484,072.53</td>
<td>13,624,110.93</td>
<td>10,515,984.45</td>
<td>29,559,403.23</td>
<td>2,342,478.79</td>
<td>31,901,882.02</td>
</tr>
</tbody>
</table>
Organization Sponsors

**Sponsor Comparison**

- **Search Sponsor**
  - **Single Selection**: Group Selection
  - **Quick Select**
    - Org Units in My Profile
      - CHEM-TAMU-Chemistry
      - BMR-BioChemCenter For Biological Nuclear Medicine
      - CCCA-TAMU-Chemistry Center For Chemical Characterization And Analysis
      - CYCL-TAMU-Cyclotron Institute
      - IAMCS-TAMU-Institute For Applied Computational Mathematics
      - AMCS-TAMU-Institute For Applied Mathematics And Statistics
      - IQS-TAMU-Institute For Quantum Studies
      - ISO-TAMU-Institute For Scientific Computation
      - ITEC-TAMU-Institute For Internet 2 Technology Evaluation Center
      - MATH-TAMU-Mathematics

- **Sponsor Awards Comparison**: CHEM-Chemistry, Organization Activity With Associates
  - **Action**: View
  - **Export To Excel**: Detach

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Sponsor Type</th>
<th>Amount</th>
<th>Amount %</th>
<th>Award Count</th>
<th>Count %</th>
<th>Amount Comparison</th>
<th>Count Comparison</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Science Foundation</td>
<td>Federal</td>
<td>16,762,469</td>
<td>27.32%</td>
<td>51</td>
<td>22.08%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NIH-ETI-NIH-National Institute of</td>
<td>Federal</td>
<td>11,377,934</td>
<td>18.61%</td>
<td>13</td>
<td>5.63%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>General Medical Sciences</td>
<td></td>
<td>8,729,313</td>
<td>14.28%</td>
<td>53</td>
<td>22.94%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Potential Future Project–Departmental Dashboard

- **Current Status**
- **Statistics**

(similar to Administrative Dashboard, reports/tables based on common departmental needs)
Contact Info

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**Maestro Project Director:** Leonarda Horvat, [l-horvat@tamu.edu](mailto:l-horvat@tamu.edu), 979-458-8740