Maestro Overview for Departments
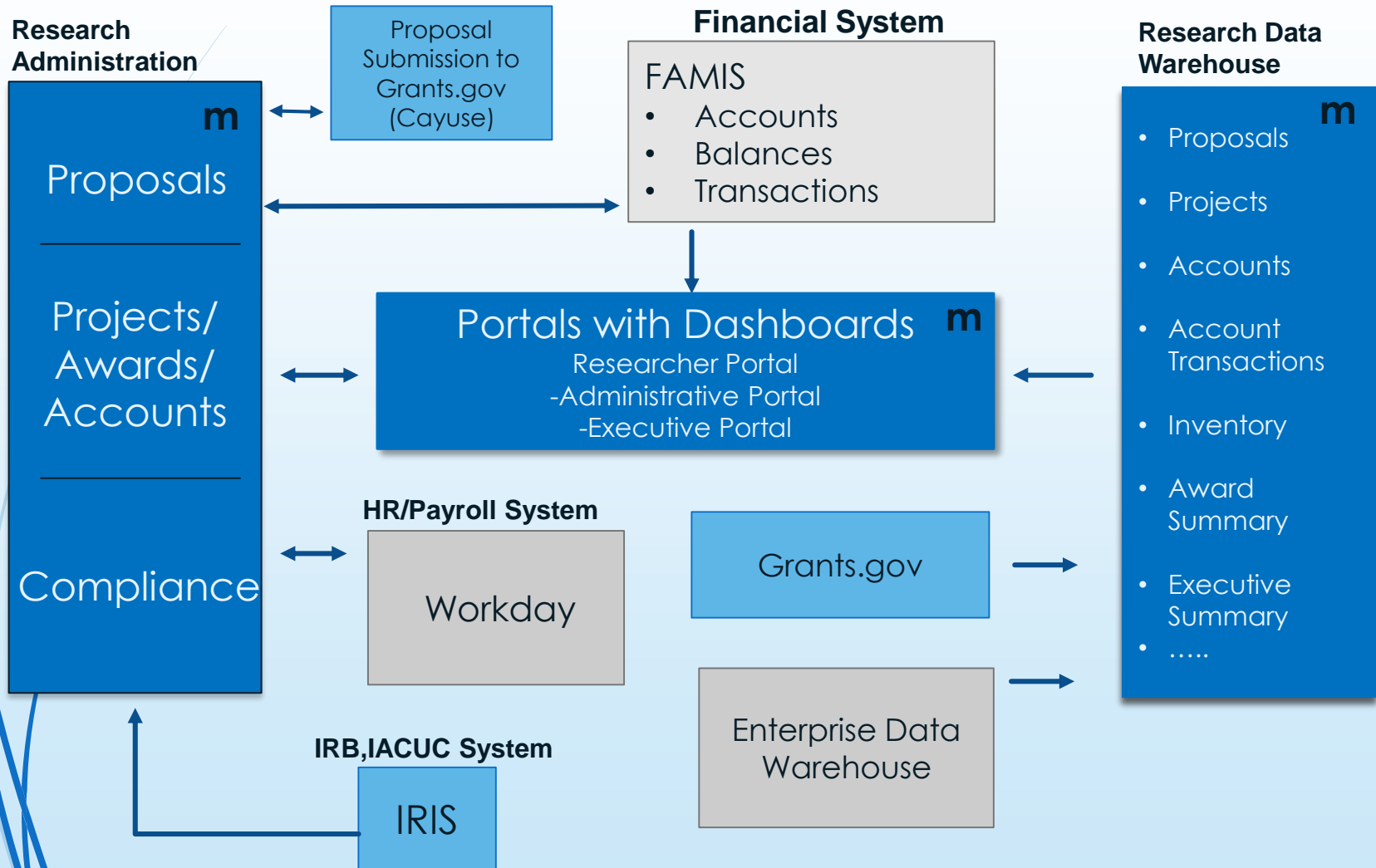
June 2020

maestro

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

Maestro Modules & Interfaces

Research Administration

m

Proposals

Projects/ Awards/ Accounts

Compliance

Proposal Submission to Grants.gov (Cayuse)

Financial System

FAMIS
- Accounts
- Balances
- Transactions

Research Data Warehouse

m

- Proposals
- Projects
- Accounts
- Account Transactions
- Inventory
- Award Summary
- Executive Summary
- …..

Portals with Dashboards **m**
Researcher Portal
-Administrative Portal
-Executive Portal

HR/Payroll System

Workday

Grants.gov

Enterprise Data Warehouse

IRB,IACUC System

IRIS

maestro

6/18/2020

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

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

June 18, 2020

maestro

Maestro Training

June 18, 2020

Researcher Portal

How can I help researchers?
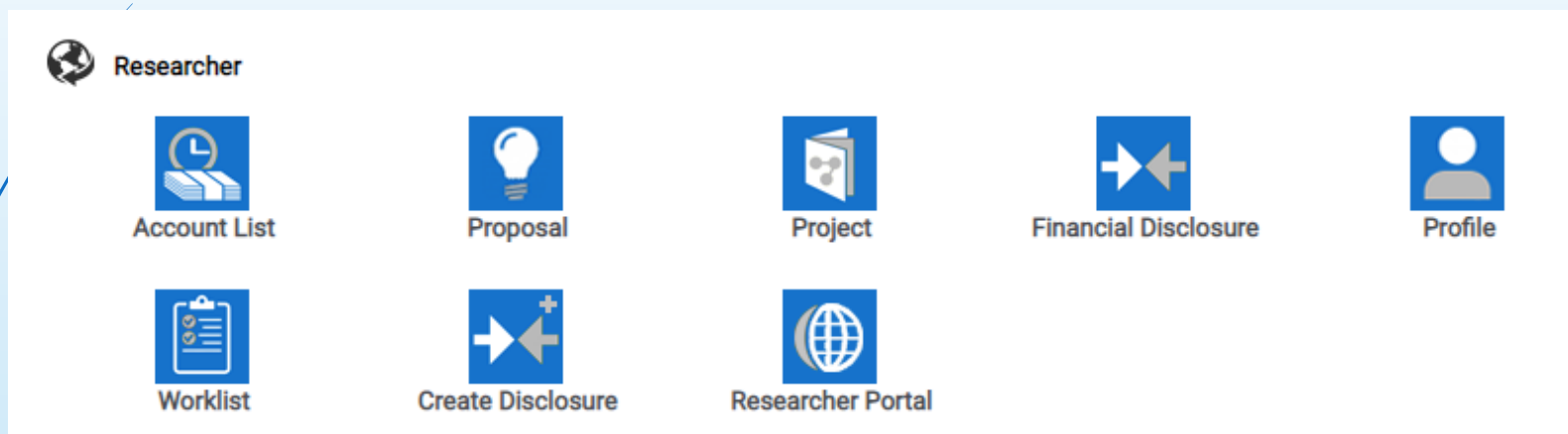
Researcher Portal Access

➡ **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

June 18, 2020

maestro

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)   ☒ Export to Excel   ▼ Show Selected Rows

| MAY-2020 | APR-2020 | MAR-2020 | FEB-2020 | JAN-2020 | DEC-2019 | NOV-2019 | OCT-2019 | SEP-2019 | AUG-2019 | ❯ ▾ |

Total Monthly Expenditure: 19,585.06

	Account Number	Member	Name	Sponsor	Expenditu	End Date	Select Rows for Export/Review
▸	121222-70360	AL-RSRCH	Fy20 R&G - Stelly	State of Texas - State Ap...	2,601.97		☐
▸	124208-70360	AL-RSRCH	New Cropping Fov4 - Stelly	State of Texas - State Ap...	975.09		☐
▸	130014-05894	TAMU	Cs -Pi Stelly 06-505894 U...	State of Texas - State Ap...	317.24	5/30/2021	☐

maestro

2020

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

▲ **Delegate Settings**

Action ▼ View ▼ ✚ ✖ 📄 🧽 📑 ⬚ Detach

Delegate	Member	Organization	Delegate Access	Certify
Tye Rougas 🔍	TAMU	Research Informatio...	Deliverable ▼	☑ I am responsible for all the actions of the delegate performed with this access

maestro

Administrative Portal

How to find my department proposal/project data?
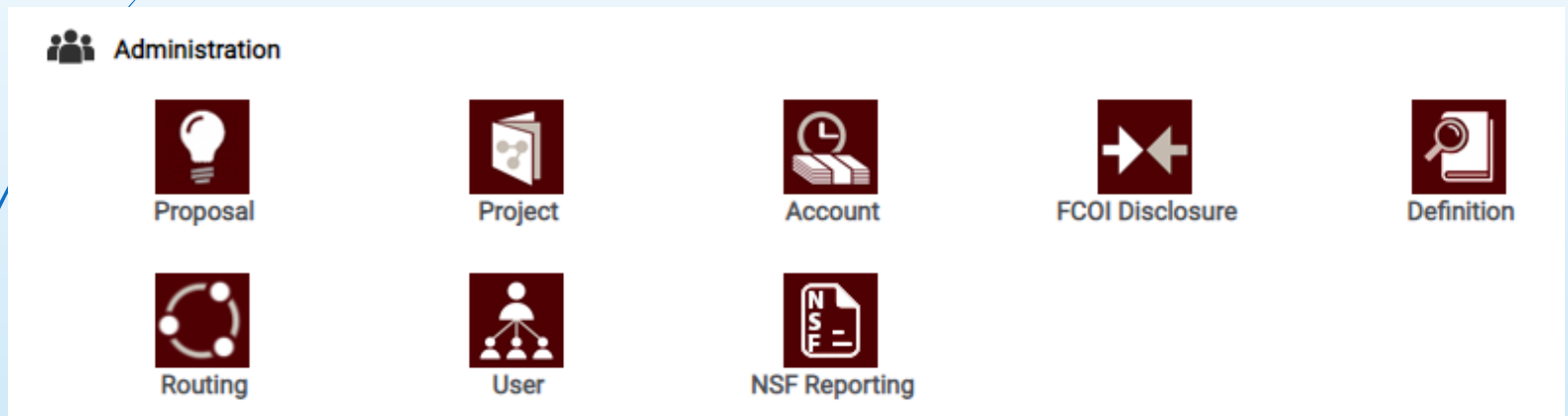
Proposal Search

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

Proposal Reports

Departmental Cost Sharing for Proposal

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

maestro

Project Search

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

Billing Project Search

Terms and Condition Search

Action Search

Integrity Check Search

Deliverable Search

Award/Modification Search (Negotiation History)

Sponsored Invoice Search

Sponsored Invoice Reports

Invoice Collection Log

Sponsored Invoice Reports

Pending Expenditure Adjustments

Account Search

Account Reports

List of Sponsored Research Accounts in Department

◢ Report Parameters

Department 8464

Show accounts in closing (N/Y) N

List Of Sponsored Research Accounts In Department

Action ▼ View ▼ [x] Detach

Responsible Person	Account Number	Sa Short Title	End Date	Billing Project	Billing Project Status	Project Administrator	Lead Pi	Maestro Id	Account Balance Direct	Account Balance Indirect	Account Balance Total
Hongcai Zhou	446292-00001	Cash Matching ...	30-Sep-2018	4462920000	Active	Shelly Grassinger	Hongcai Zhou	M1700168	0.00	0.00	0.00
Lisa Perez	420021-00001	Biophysical Co...	30-Apr-2020	4200210000	Active	Shelly Grassinger	Lisa Perez	M1900438	0.59	0.10	0.69
Sarbajit Banerjee	424601-00001	Super-Slick Coa...	31-May-2020	4246010000	Active	Shelly Grassinger	Sarbajit Banerjee	M1902584	3,054.79	339.40	3,394.19
Peng Zhang	413271-00001	A Novel Metal-...	30-Jun-2020	4132710000	Active	Shelly Grassinger	Peng Zhang	M1700754	649.37	670.92	1,320.29
Peng Zhang	413271-01001	50% Idc - A Nov...	30-Jun-2020	4132710000	Active	Shelly Grassinger	Peng Zhang	M1700754	10,803.53	5,034.89	15,838.42
Arthur Lagano...	414591-00001	Development O...	30-Jun-2020	4145910000	Active	Shelly Grassinger	Arthur Lagano...	M1800195	30,435.64	19,717.35	50,152.99
David Russell	414601-00001	Development O...	30-Jun-2020	4146010000	Active	Shelly Grassinger	David Russell	M1800196	28,462.39	18,455.86	46,918.25
David Russell	419902-00001	Resource For N...	30-Jun-2020	4199020000	Active	Shelly Grassinger	David Russell	M1900321	408.78	395.16	803.94
David Russell	419912-00001	Resource For N...	30-Jun-2020	4199120000	Active	Shelly Grassinger	David Russell	M1900322	23.08	562.15	585.23

maestro

Account Reports

Accounts with Direct or Indirect Deficit

◢ Report Parameters

Administrative Organization

Member TAMU

Organization 8464

Project administrator

Accounts With Direct Or Indirect Deficit

Action ▾ View ▾ [x] Detach

| Member	Org Name	Maestro Id	Project Number	Billing Project Status	Account Number	Responsible Person	Administrator	Account Balance Direct	Account Balance Indirect	Account Balance Total
TAMU	Chemistry	M1703237	4140310000	A	414031-00001	Darensbourg, M...	Shelly Grassinger	1233.18	-52.39	1180.79
TAMU	Chemistry	M1803265	4187110000	A	418711-01001	Akimov, Alexey	Shelly Grassinger	-0.06	13.33	13.27
TAMU	Chemistry	M1901376	4231210000	A	423121-00001	Liu, Wenshe	Shelly Grassinger	-5852.54	6425.68	573.14
TAMU	Chemistry	M1901454	4231910000	A	423191-00001	Zhou, Hongcai	Shelly Grassinger	-13612.86	26261.8	12648.94
TAMU	Chemistry	M1902620	4246510000	A	424651-00001	Batteas, James	Shelly Grassinger	-979.69	2893.03	1913.34
TAMU	Chemistry	M1903337	4276910000	A	427691-00001	Gladysz, John	Shelly Grassinger	-8257.12	6944.87	-1312.25
TAMU	Chemistry	M1903528	4279310000	A	427931-00001	Sczepanski, Jo...	Shelly Grassinger	-2047.41	452	-1595.41
TAMU	Chemistry	M1501181	4843710000	C	484371-10811	Bergbreiter, Dav...	Scott Kilburn	0	-0.01	-0.01

June 18, 2020

Executive Portal

How to find my department performance data?
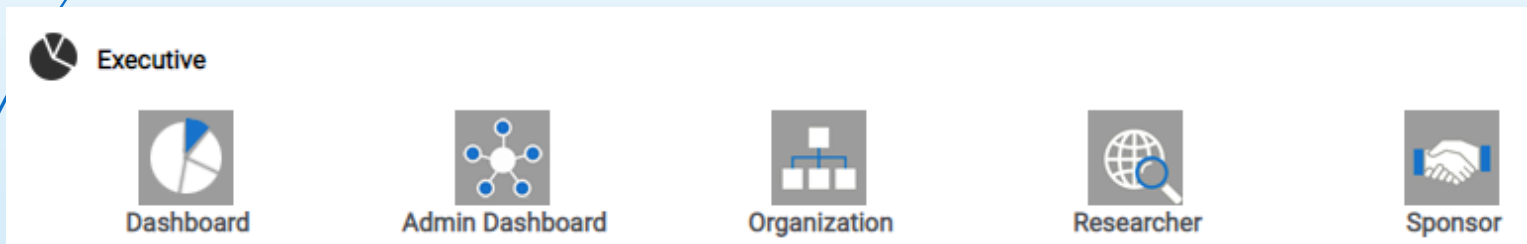
Required Role: **Executive** for Department

maestro

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".

maestro

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".

maestro

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"

June 18, 2020

maestro

Organization Activity

Organization Sponsors

Departmental Dashboard

Potential Future Project–Departmental Dashboard

- Current Status

- Statistics

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

Contact Info

Central Support: maestro@tamu.edu 979-458-8745, Tye Rougas 979-458-8741 and Catherine Yancy 979-458-8742

Maestro Project Director: Leonarda Horvat, l-horvat@tamu.edu, 979-458-8740

maestro