MAESTRO UPDATE: BUDGET FORECASTING PROJECT AND KEYWORD SEARCHES

MAY 2025







RESEARCHER PORTAL ENHANCEMENTS - DEMO



















O Select PI)>

04/21/25 09:16 AM | 🔀 Suppor





*Shaded projects END within three months.

*You can hide an Account from current list using 'Hide Account' link, to add an account back use 'All Accounts' filter option.



nd Lead Org Active Accounts							Filter Mode Export
ixed Price - Tournel Tournel S-Electrical And Computer Engineering itutional Sources	Administrator: Center: Status: Frozen:		Direct Balance 25.41	Indirect Balance 0.00	Total Balance 25.41	Hide Account	Add Favorite
rge Bush China-Us Conference - Kezunovic IU-Electrical And Computer Engineering versity Authorized Tuition-Designated Tuition	Administrator: Center: Status: Frozen:	Active	Direct Balance 9,721.23		Toggles whether an acco Balances" lists Total Balance 9,721.23	unt is hidden on the	"Active Accounts" and "A Add Favorite
Adms Design For Predictive Outage And Asset M art Grid Center nal Sources	Administrator: Center: Status: Frozen:		Direct Balance 541.26	Indirect Balance 0.00	Total Balance 541.26	Hide Account	Add Favorite
sortium - Power Systems Engineering Research (trical And Computer Engineering rivate Profit	Administrator: Center: Status: Frozen:	Active	Direct Balance 244,175.39	Indirect Balance 0.00	Total Balance 244,175.39	Hide Account	Add Favorite
unovic Udp Funding IU-Electrical And Computer Engineering Sponsored	Administrator: Center: Status: Frozen:	Active	Direct Balance 5,000.00	Indirect Balance 0.00	Total Balance 5,000.00	Hide Account	Add Favorite
i Gifts IU-Electrical And Computer Engineering as A&M Foundation	Administrator: Center: Status: Frozen:	Active	Direct Balance 76,892.20	Indirect Balance 0.00	Total Balance 76,892.20	Hide Account	Add Favorite





Active Accounts | Search : Account Number, Account Title, Sponsor and Lead Org

Lead Organization: TEES-Electrical And

Sponsor: Institutional Source

Active Accounts

All Accounts

Account Title: Pi Fixed Price - Kez Active Accounts

Accounts with Balances



Account: 212637-00000

Kezunovic, Mladen Primary PI:

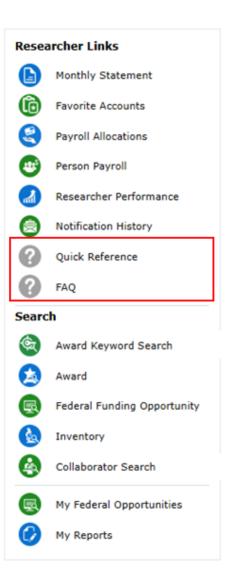
Start Date: 18-Apr-1994

End Date:

Administrator: Tamara Lopez Account Title: Elen-Pi Idc-**Show Account Add Favorite** Center: **Direct Balance Indirect Balance Total Balance** Lead Organization: TAMU-Electrical And Computer Engineering 129.42 Status: Active 0.00 129,42 Sponsor: Designated Funds - F&A Revenues Frozen: No Administrator: Griselda Vazquez Account Title: Pi Incentive -**Show Account** Add Favorite Center: Direct Balance **Indirect Balance** Total Balance Lead Organization: TEES-Electrical And Computer Engineering -15,438.05 = Status: Active -15,438.05 0.00 1 Sponsor: Institutional Sources Frozen: No Administrator: Tamara Lopez Account Title: Residual Funds - Film Communic Center: **Show Account** Add Favorite **Direct Balance Indirect Balance** Total Balance Lead Organization: TAMU-Electrical And Computer Engineering Status: Active 0.00 0.00 0.00 Sponsor: Residual Funds-Grants & Contracts Frozen: No



FAQ AND GETTING STARTED



* A special thanks to the Engineering Research Council for the idea





NEW PI COMPLIANCE ITEM: BIOSAFETY - LIFE SCIENCES



NEW ITEM WITH REQUIRED UPLOAD

Proposal & Project Compliance

- If PI answers Yes to proposal involving Life Sciences upload will be required of the completed Assessment provided in the Related URL Link, and an additional question will populate
 - Click more to expand the definition







RESEARCH SECURITY TRAINING



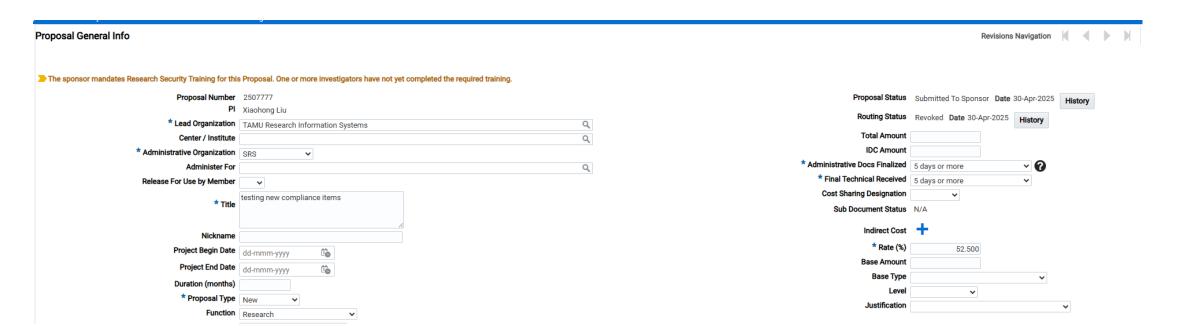
REQUIRED RESEARCH SECURITY TRAINING

- Researchers who will be submitting Department of Energy (DOE) proposals on or after May 1, 2025 are required to complete research security training PRIOR to proposal submission.
- This applies to all Covered Individuals, including any principal investigator (PI); project director (PD); co-principal investigator (Co-PI); co-project director (Co-PD); project manager; and any individual regardless of title that is functionally performing as a PI, PD, Co-PI, Co-PD, or project manager, as well as anyone designated by DOE.
- The Act defines "covered individuals" as those who significantly contribute to a federally funded project's development or execution. This group includes, but is not limited to, Principal Investigators (PIs), Project Directors (PDs), and co-investigators. Additionally, certain technical personnel, such as postdoctoral researchers or graduate students, could fall under this category if their contributions to the research are substantial.
- Communication included in the <u>April CPI Newsletter</u>
- Research Security Training Requirement | Department of Energy



NOTICE - REQUIRED TRAINING IS INCOMPLETE

- 1. Real Time API from TrainTraq to update the training completion status in real time
- 2. Indicator on Proposal and Project General screen and Proposal Routing Document



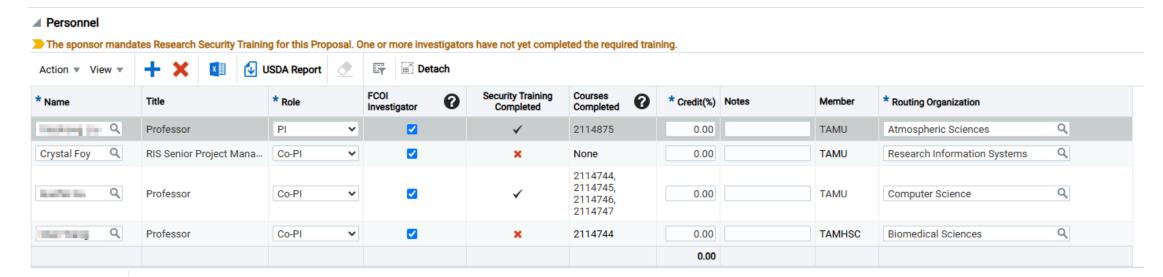


NOTICE - CONTINUED

3. Sponsor Indicator on Proposal and Project General screen to note that training is required based on sponsor setting



4. Training Completion on Proposal and Project Personnel screen – new columns will show for applicable sponsor / prime sponsor





MAESTRO VALIDATION ON PROPOSAL STATUS

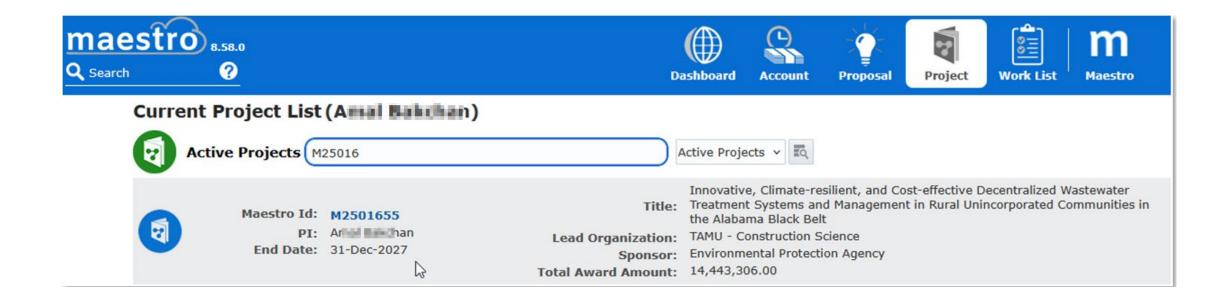
- 1. When required by the sponsor, and training is incomplete by a PI, Co-PI or Co-I on the personnel screen, Maestro will validate in the following ways:
 - Banner notification on Proposal General screen and Proposal Routing document so it is easy to see that required training is incomplete
 - Proposal Routing will not be affected, proposal can complete the routing process for approvals
 - Proposal status cannot be changed to Submitted to Sponsor until required training is completed by PI, Co-PI & CO-I roles on personnel screen
 - If this becomes an annual requirement, additional validations will be defined on the Project side.



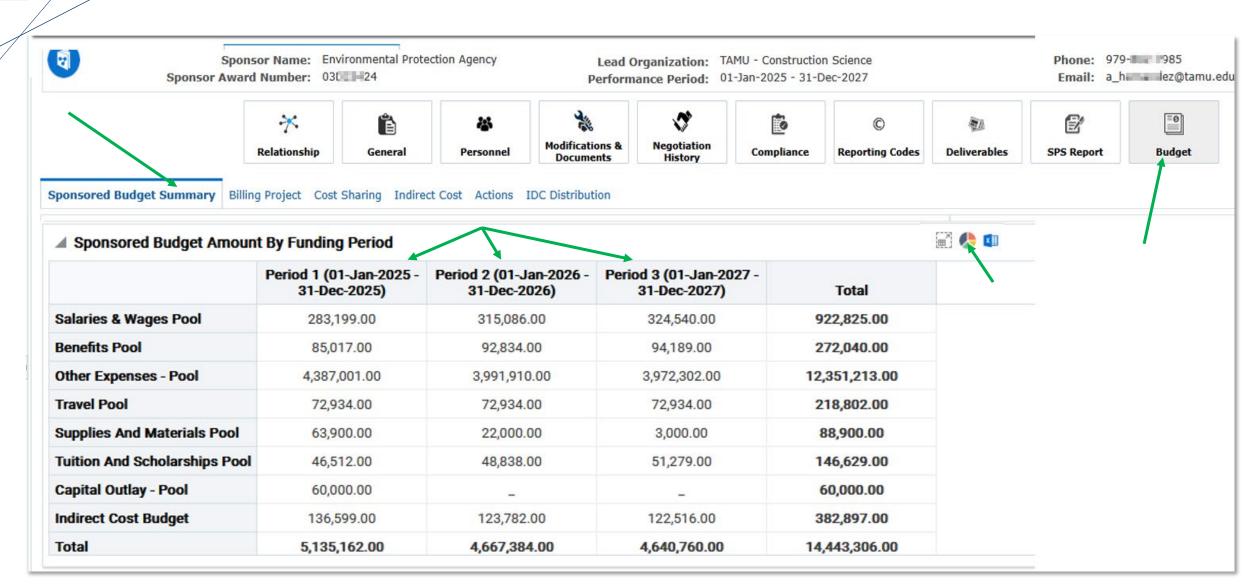


DEMO BUDGET ENTRY

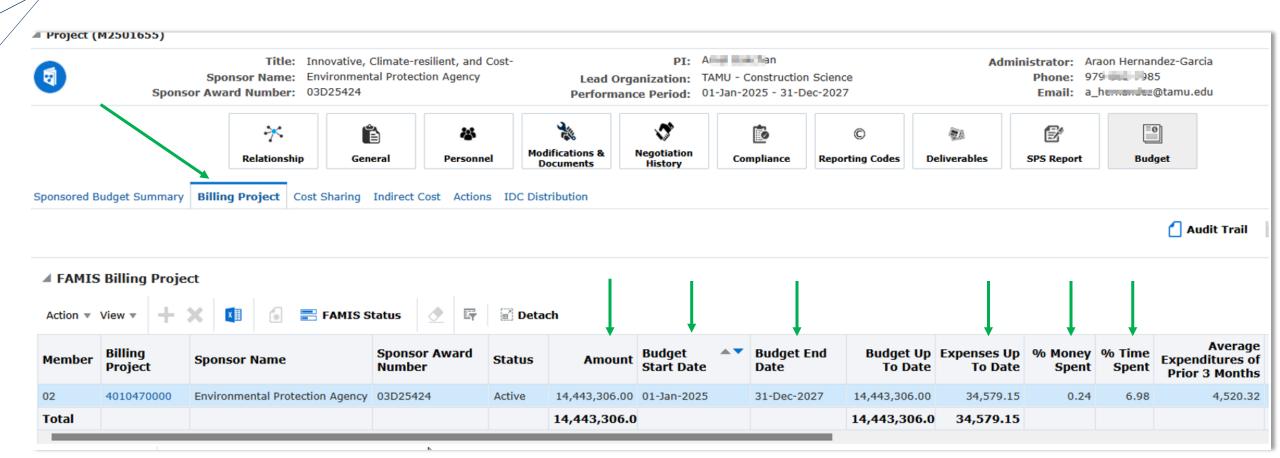
















BUDGET FORECASTING



BUDGET FORECASTING PI FOCUS GROUP

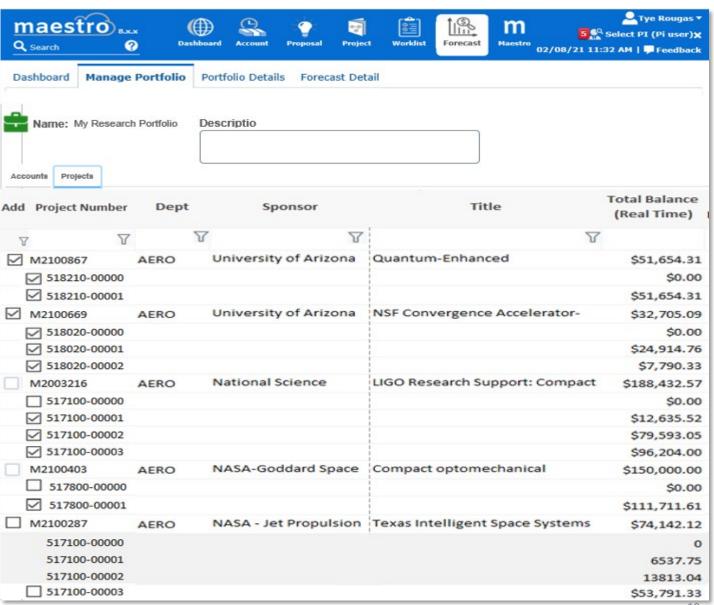
- Need PI focus group volunteers to
 - a. Define the problem
 - b. Brainstorm solutions
 - c. Discuss the solution ideas and usability
- Plan implementation strategy
- Contact: maestro@tamu.edu if you know anyone who would like to participate or you think would add value





Manage Portfolio

 Build a new account portfolio that would group several accounts based on function or an award

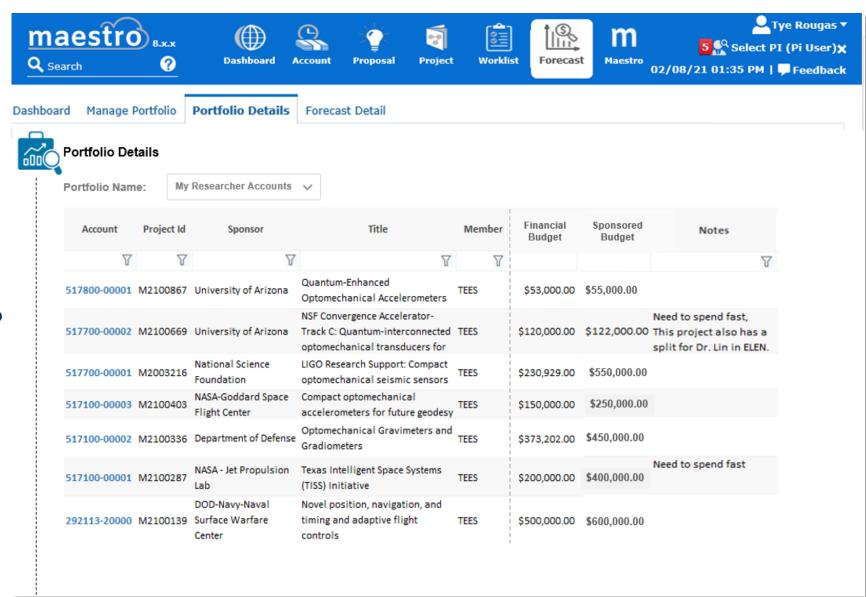


Τ2



Portfolio Details

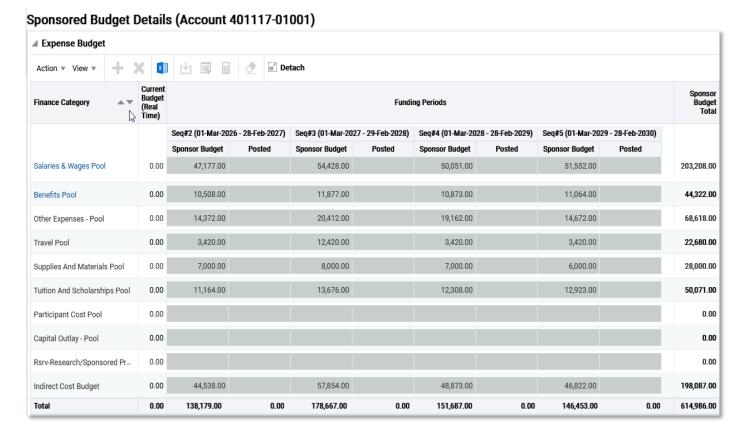
 Add account sponsored budget entered by SRS to forecasting portal





Forecasting Portal

 Add new projections based on existing sponsored budget







Forecasting Portal

 Dashboard to visualize spending and forecasted data



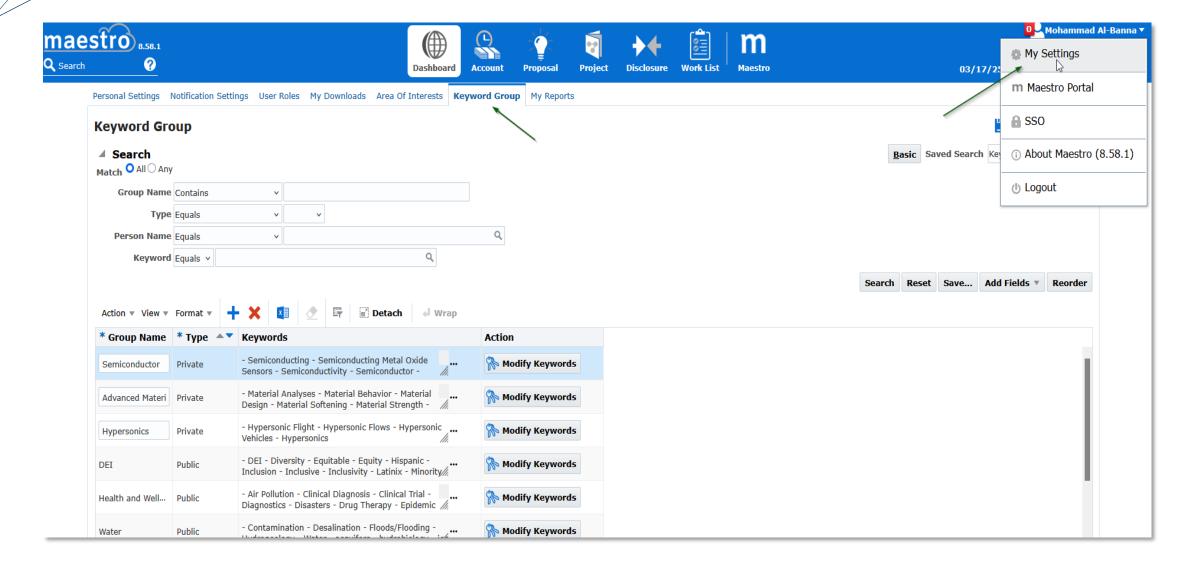




AVAILABLE KEYWORD
ACTIONS AND SEARCHES DEMO

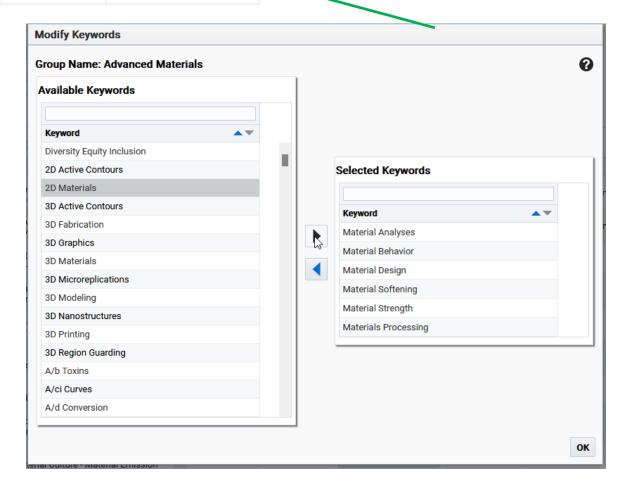


View and create Keyword Groups





* Group Name	Keywords	* Type ▲▼	Action
Animal	- Animal - Animal Agriculture - Animal Amp - Animal Behavior - Animal Behavior/Ethology -	Private	Modify Keywords
DEI	- DEI - Diversity - Equitable - Equity - Hispanic - Inclusion - Inclusive - Inclusivity - Latinix - Minority//	Public	Modify Keywords
Health and Wellne	- Air Pollution - Clinical Diagnosis - Clinical Trial - Diagnostics - Disasters - Drug Therapy - Epidemic //	Public	Modify Keywords





Proposal Routing Action

ATTN. INVESTIGATORS:

By clicking Approve button, you certify, to the best of your knowledge and belief, that ...

- a) You are not delinquent on any Federal debt, such as student loans, etc. (this does not include income taxes): (applies to fellowships, sch
- b) You are not currently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from current transaction
- c) You agree to accept responsibility for the scientific conduct of the project and to provide the required progress reports if an award is made
- d) You understand that any false, fictitious, or fraudulent statements or claims may subject you to criminal, civil, or administrative penaltie
- e) You agree to comply with TAMUS Regulation #15.01.03, Financial Conflicts of Interest in Sponsored Research, and you understand your training.
- f) You agree to comply with the TAMUS Policy on Ethics in Research and Scholarship, TAMUS #15.99.03.
- g) You agree to comply with the TAMUS regulations on Intellectual Property Management and Commercialization, TAMUS #17.01.
- h) You certify that the information submitted within the application is true, complete and accurate to the best of your knowledge.
- i) I agree to disclose any nepotism issues and agree to follow TAMUS policy #07.05 Nepotism.
- j) You have reviewed applicable subawardee documents, if any, including the subawardee's statement of work and budget and both appear

ATTN. DEPT. HEADS, DIRECTORS, DEANS:

By clicking Approve button, you certify that you have received this proposal and all accompanying documents, you are aware of all requirer

Notes or Reason For Rejection

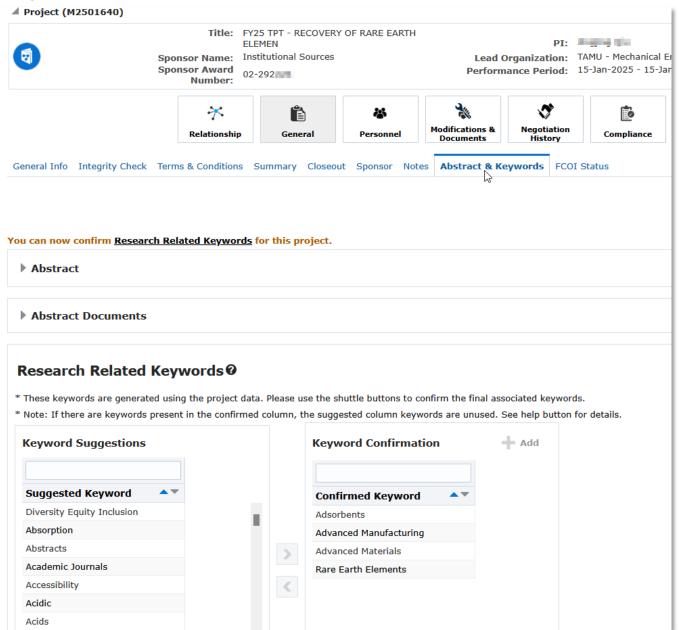
To find this proposal more easily, confirm Keywords to categorize it with similar proposals.



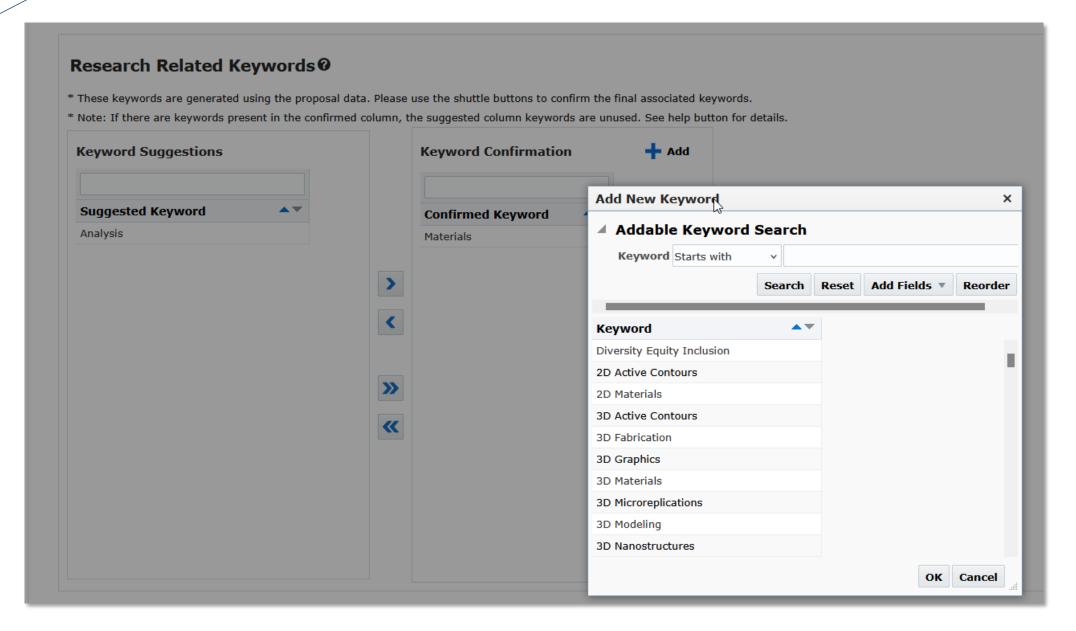




Confirming Keywords





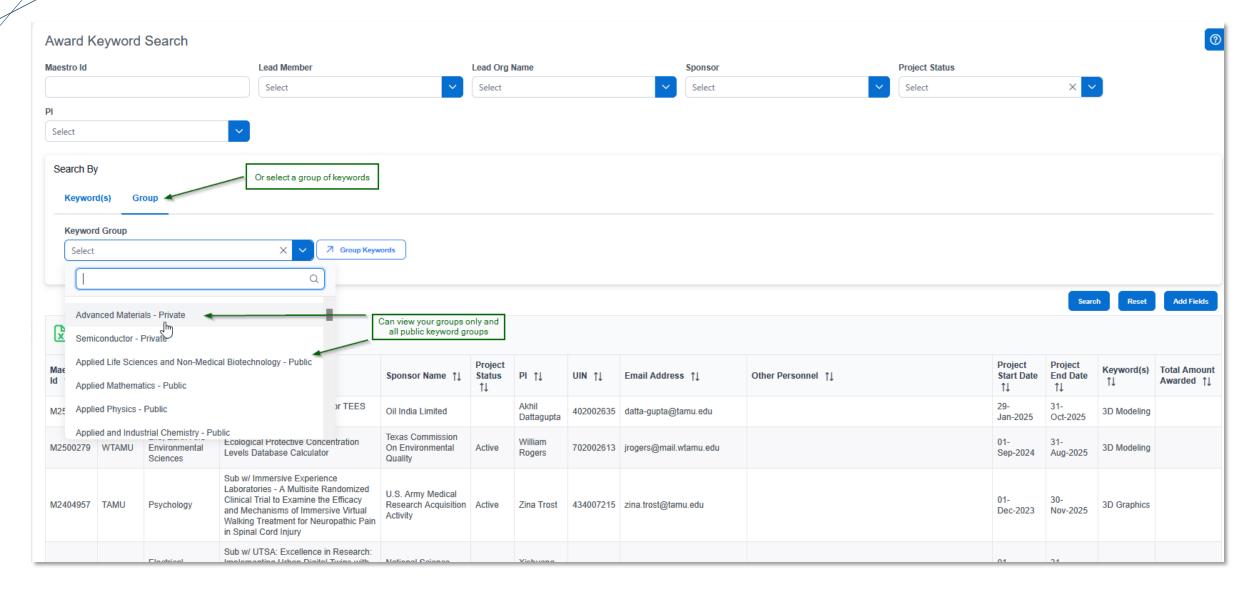




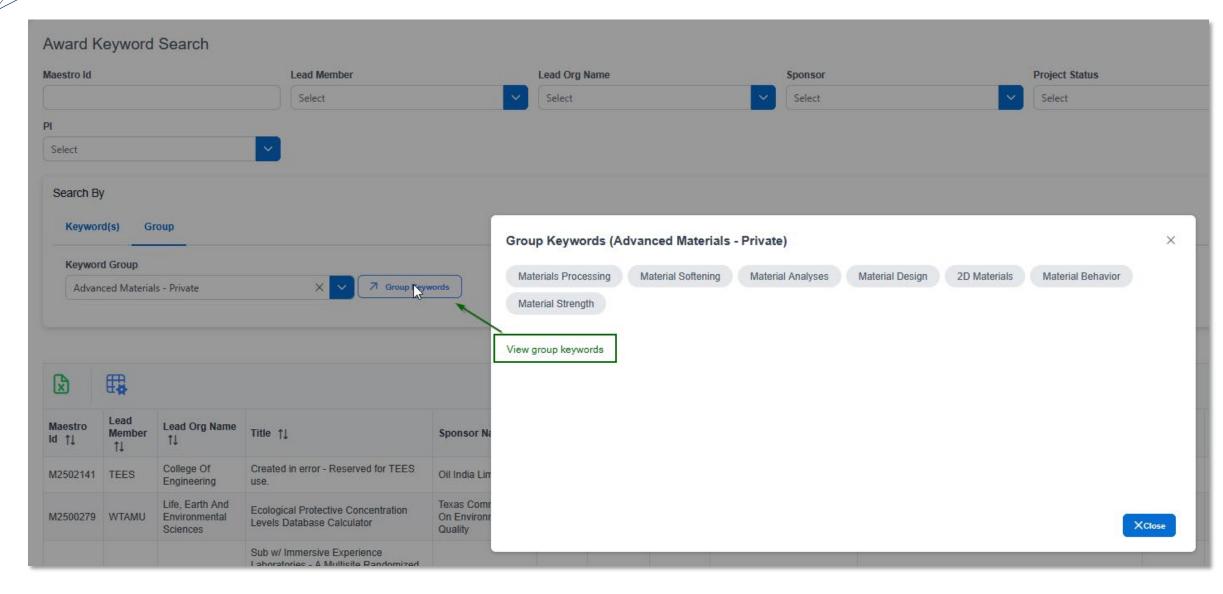
Available Keyword Searches

Researcher Links Monthly Statement Favorite Accounts Payroll Allocations Person Payroll Researcher Performance Notification History Quick Reference FAQ Search Award Keyword Search Award Federal Funding Opportunity Inventory Collaborator Search My Federal Opportunities My Reports

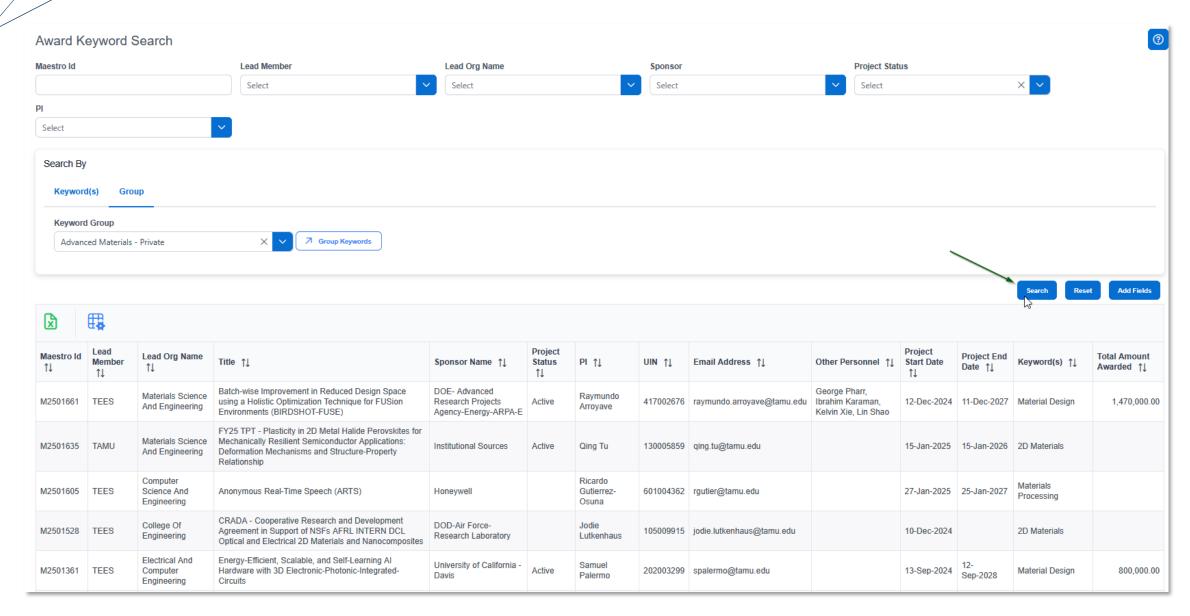




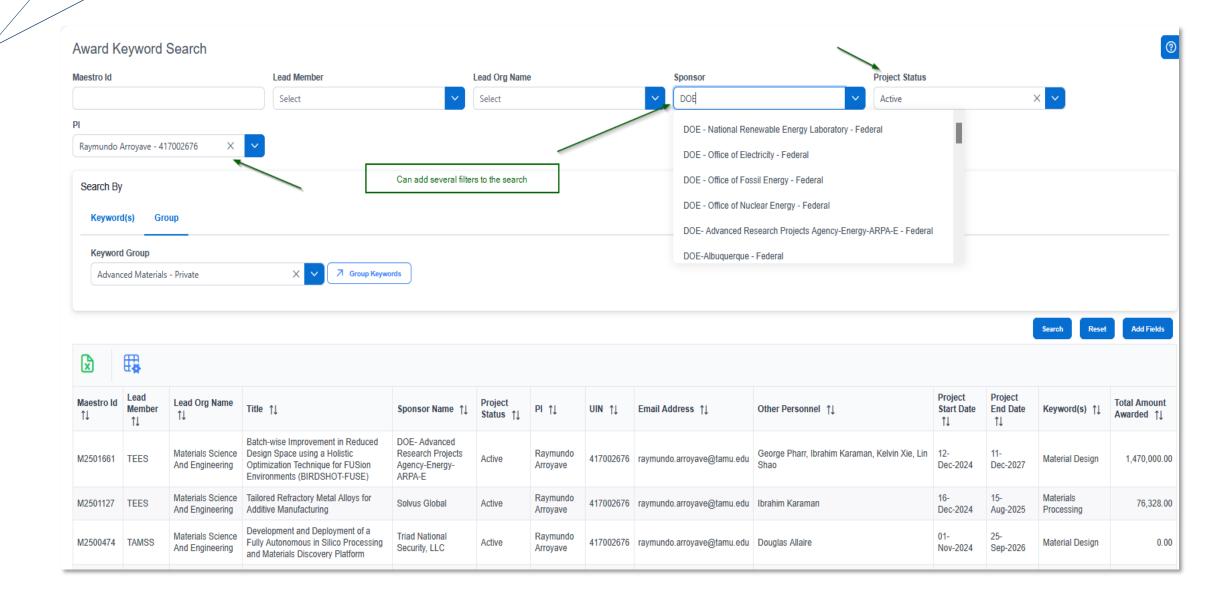




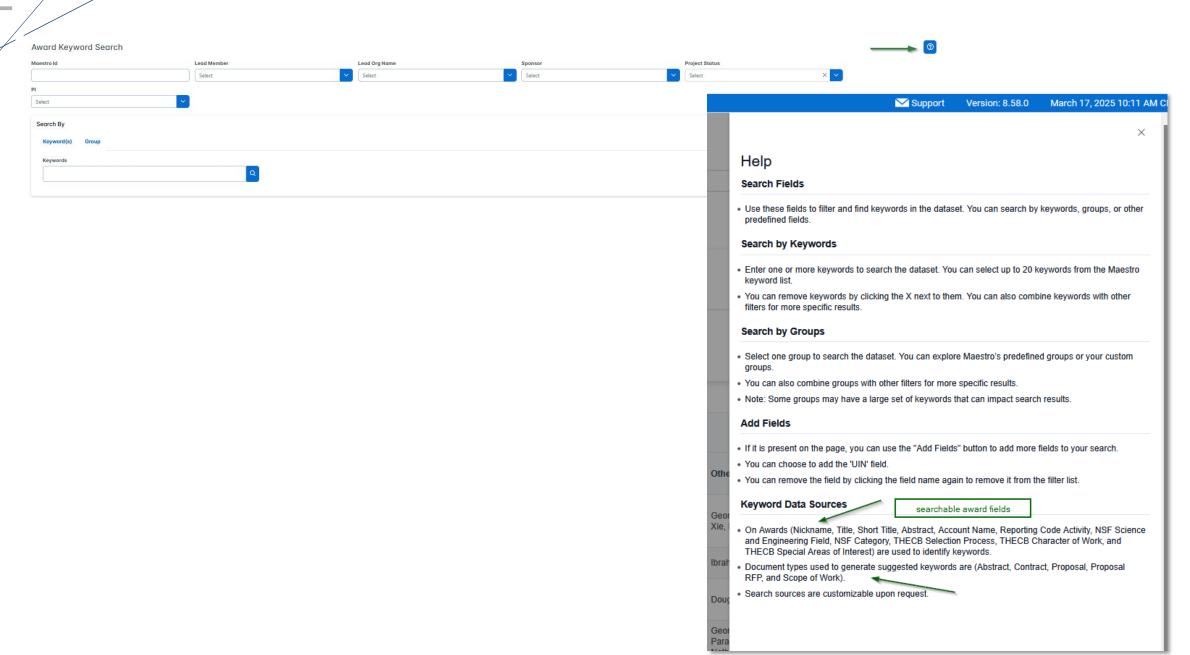




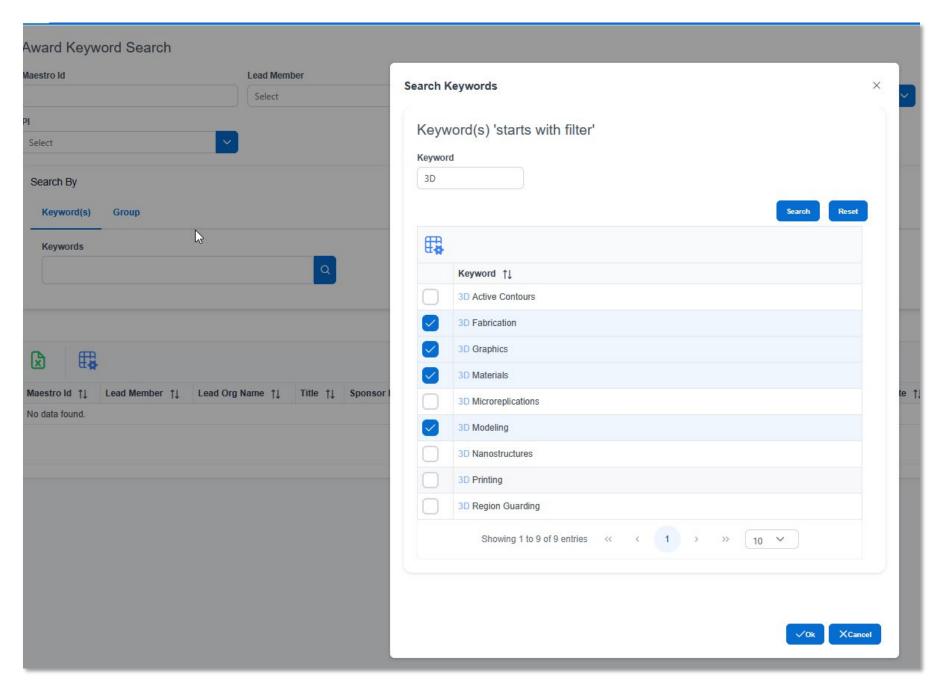




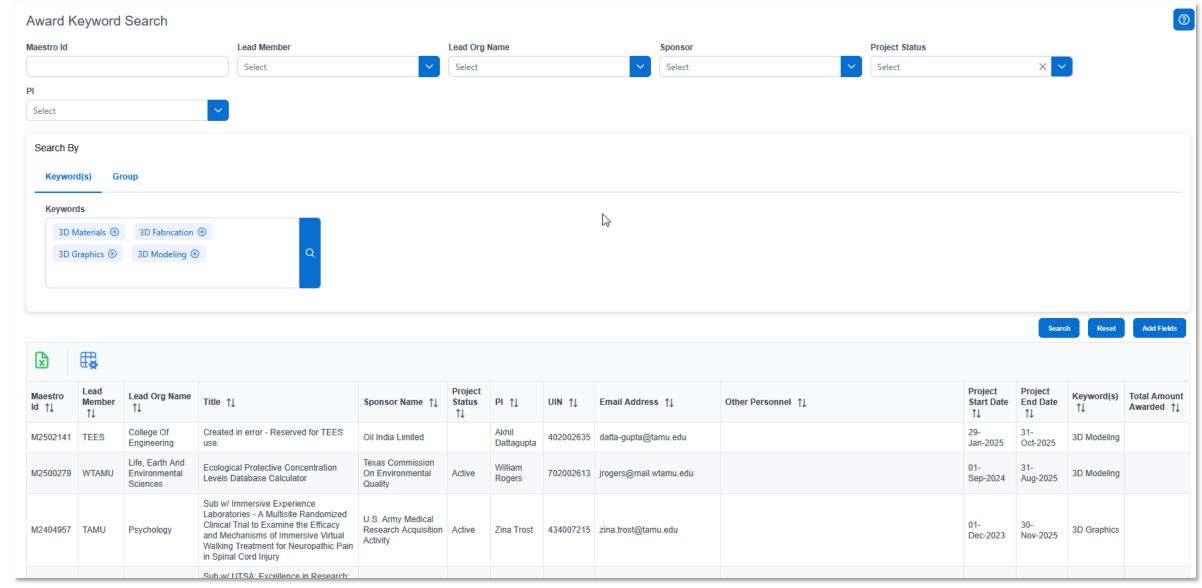




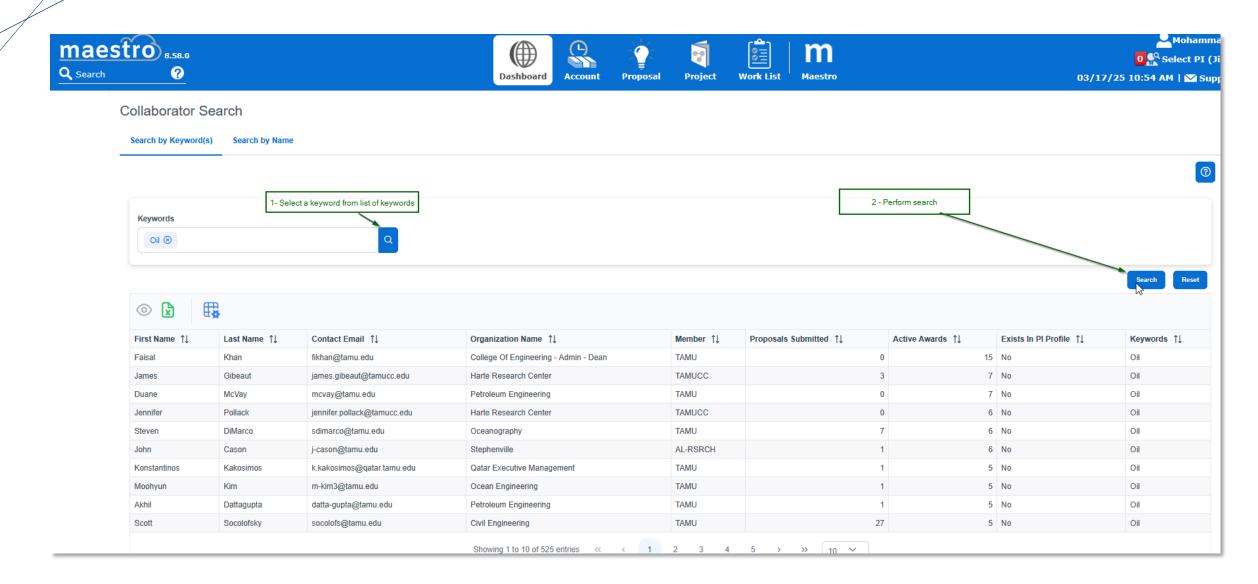




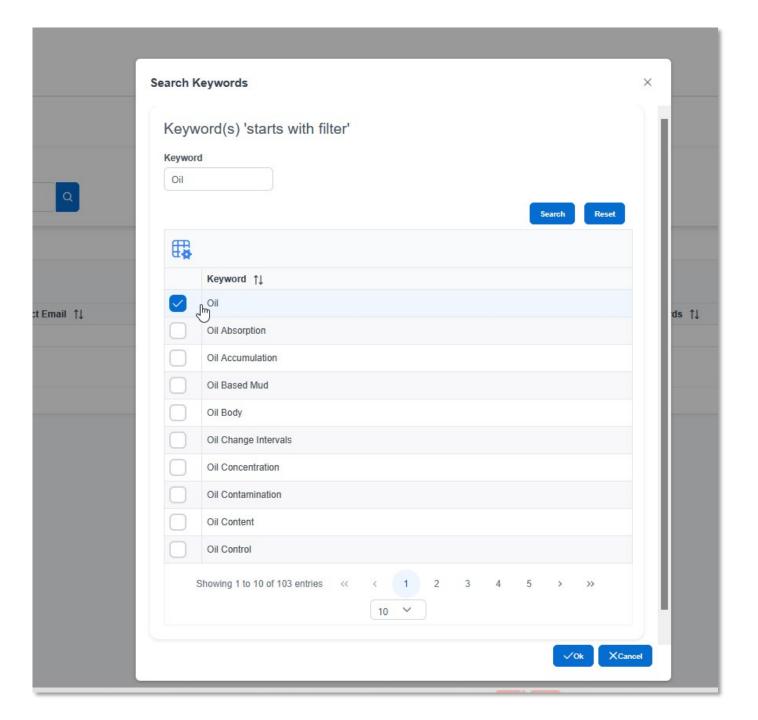


















Name Steven DiMarco Work Phone (979) 862-4168 Email Address sdimarco@tamu.edu Member TAMU Organization Geochemical & Environmental Research Gro Area of Interest Keywords lackKeyword ↑↓ Gulf of Mexico Tidal Heights Tidal Currents Nonlinear Surface Wave Interaction Mixed-Layer Dynamics Large-Scale Ocean Transport Regional Climate Prediction Dynamical/Statistical Models Continental Shelf Oceanography

Active Research Projects

Oceanographic Database Management





