

Meeting Notes

Thursday, April 8, 2021

12:30pm-2:00pm – Zoom Meeting

Members Present	Members Unable to Attend	Others Present
Tamika Gilreath, HLKN Ben Herman, TLAC Sandra Acosta, EPSY Mary Alfred, EAHR Jamilya Blake, EPSY Marielle Engelen, HLKN Joanne Olson, TLAC Steven Riechman, HLKN Christine Stanley, EAHR Kay Wijekumar, TLAC David Wright, HLKN		Rafael Lara-Alecio, EPSY (UniversityCPI) Timothy Elliott, EPSY (UniversityCPI) Jeff Liew, CERD Pre Award Julie Svetlik, CERD Pre Award Ann Savell, CERD Pre Award Jason Foley, CERD Pre Award Amy Hinnant, CERD Pre Award Suprena Bennet, CERD Post Award Clayton Holle, CERD Post Award Leonard Horvat, Maestro Tye Rougas, Maestro Stewart Hutchins, CEHD IT
Agenda Item	Comments	Recommendations/Actions/Follow-up
I. Welcome / Review of Meeting Minutes	Upon motion duly made and seconded, the minutes of the meeting of February 11, 2021 were approved. Minutes will be posted at this link: https://mycehd.tamu.edu/faculty/research-office/council-of-principal-investigators/	Members are reminded that the minutes will be listed on the College CPI website. Visit the website for an electronic copy of the bylaws and the updated list of CPI members.
II. MAESTRO Updates/ Navigation presentation	Leonarda Horvat presented updates to the Maestro system (see the attached slides). The presentation was recorded for future dissemination. One important note mentioned: for your project to be properly categorized as Education in the Reporting Codes screen, be sure to	CERD will distribute the slides from the Maestro presentation to CPI members to share with their departments. The recording of the presentation has been edited and posted on CERD’s facebook page for viewing at: https://www.facebook.com/cerdtamu

Agenda Item	Comments	Recommendations/Actions/Follow-up
	<p>choose “Non S&E”, (non-science & engineering) under the NSF Science and Engineering Field drop-down, and then select “Education”.</p> <p>Someone mentioned that they recently attended the Maestro training course, and it was very informative.</p>	<p>When the video is made available on other platforms, CERD will send out an announcement to all faculty.</p> <p>For more in-depth training, you can attend a maestro training course offered via zoom. Once logged into Maestro, go to About Maestro to see training options.</p>
<p>III. Updates from Information Technology</p>	<p>Stewart Hutchins, Director of CEHD Technology Services, presented information on NVivo, a qualitative data analysis software that the Dean implemented last summer. There has been a big request to increase access to the software. They are getting a site license, which will include faculty, students, and staff, so everyone in the college can use it.</p> <p>Stu pointed out that CEHD researchers have mentioned that they want to collaborate on the same document, and NVivo makes a collaboration server that will be housed on-site. We will start out by purchasing 30 “seats” for this tool. Stu would like to hear from our faculty about whether this collaboration tool is needed and, if so, whether 30 seats is sufficient.</p> <p>They are still working on pricing/quotes right now, but if there is an emergency situation and someone needs the software right away, NVivo will provide us a license in the interim, so please let Stu know if that arises.</p>	<p>Contact Stewart Hutchins about needs for the NVivo software.</p>
<p>IV. Return to campus research worker policies</p>	<p>Suprena Bennett provided updates on the return-to-work plans for campus.</p> <p>Texas A&M is planning to return in the fall fully open. There will be two training sessions for return to work that are mandatory for supervisors: FMLA and ADA.</p> <p>In the meantime, offices should have rotating schedules in place and be 75% capacity in all our buildings by the end of April. We will be 100% on-site by August.</p>	<p>Supervisors to take the mandatory FMLA and ADA trainings before return to work.</p> <p>For any questions regarding the return-to-work plan, please email Suprena Bennett.</p>

Agenda Item	Comments	Recommendations/Actions/Follow-up
<p>V. Updates from the Associate Dean of Research</p>	<p>Dr. Jeffrey Liew, Associate Dean of Research, reminded everyone that the next CERD Coffee Chat will take place 4/9/21 on the following topic: A One Year Retrospective on Research in COVID.</p> <p>Dr. Liew informed the members that a university-wide two-day workshop (2 hrs/day) is being planned for May. All PI's will convene across campus to tackle issue of learning loss during COVID. CEHD faculty are encouraged to participate.</p> <p>Dr. Liew announced that the USRI (Undergraduate Student Research Initiative) program will be relaunched for next academic year with the students all returning to campus. The deadline will be mid-August and Dr. Liew will send out details soon.</p>	<p>Be on the lookout for:</p> <ul style="list-style-type: none"> • University-wide workshop on learning loss during COVID • USRI program for next academic year
<p>VI. Updates from Senior Research Development Officer</p>	<p>Julie Svetlik is working on putting together a report based on the survey sent out to early Catapult awardees. The intent is to analyze the return on investment of the Catapult program. CERD will be distributing the results soon.</p> <p>Julie is working with the Associate Dean to update and maintain a list of Facilities & Resources for each department.</p> <p>In the coming weeks, CERD will be designing a survey for faculty to fill out about the CERD office, our services, and what we can add to better help them meet their needs. When CERD sends the survey out, please help push it out to your colleagues.</p>	<p>Keep an eye out for the survey Julie Svetlik will send out about CEHD researcher needs and the services CERD can offer.</p> <p>Please reach out to Julie Svetlik at jsvetlik@tamu.edu to discuss any research ideas or for help locating funding opportunities or collaborators. See a more extensive list of services in the Comments column.</p>
<p>VII. Updates from CERD Pre-Award</p>	<p>Ann Savell provided updates for the CERD Pre-Award activities.</p> <p>The deadline for Department of Education's IES proposals is expected to be released in the next couple of months, so if any faculty are considering applying, please can let CERD know as soon as possible. It is a big deadline, so the sooner they can get an idea of how many researchers are applying, the better they can plan their resources and schedules.</p>	<p>CERD will begin to provide monthly metrics from Maestro to department heads to disseminate.</p> <p>You can reach out to one of our research development officers or to our shared inbox at cehdpreaward@tamu.edu.</p>

Agenda Item	Comments	Recommendations/Actions/Follow-up
	<p>Ann presented metrics pulled from Maestro showing the count and average of proposal timeframes leading up to submission per CEHD department (see the report attached to these minutes). The question posed was whether this would be useful information for CERD to provide to each department on a regular basis.</p> <p>Some faculty expressed that they feel it would be beneficial; the data can show how researchers are interacting with our office and with SRS, can lead to improvements, and can also be used in faculty in faculty meetings to discuss timeliness.</p> <p>A member asked whether this data can be used to inform firmer internal deadlines, such as stricter adherence to the internal five-day deadline. This led to a discussion of how those rules might look. Several faculty expressed opinions for and against such a change. CERD personnel stated that no change is expected at this time – the data is intended to be informational only at this point.</p> <p>CERD reiterated that the guidelines from Texas A&M Research Administration are that proposals be received by SRS at least five days ahead of the sponsor’s deadline to ensure a proper quality check. An additional intent of this timeframe is to help minimize struggles for the PI in that last stage of the proposal development so they can focus solely on final edits of their technical documents. However, non-compliance with that internal deadline does not prevent submission – it does, however, limit SRS’s ability to provide a thorough quality check.</p>	
VIII. Updates from University CPI	<p>Dr. Rafael Lara-Alecio and Dr. Timothy Elliott provided an update from the University Council of Principal Investigators. There were very updates from the past CPI meeting. The next University CPI meeting will be held next week, so be on the lookout for those new updates.</p> <p>The University CPI typically meets the second week of each month. A monthly Newsletter and Meeting Updates are sent out to research members across the system, with information from the different</p>	<p>To view the most recent meeting materials, visit: https://cpi.tamu.edu/meetings/2020-2021-general-meeting-schedule</p> <p>Please attend the monthly University CPI Meetings; reach out to Dr. Lara-Alecio (a-lara@tamu.edu) or Dr. Tim</p>

Agenda Item	Comments	Recommendations/Actions/Follow-up
	<p>members, colleges, stations, offices such as IRB, Maestro, graduate and undergraduate research programs, etc.</p> <p>The University CPI meeting minutes are linked to on our CEHD CPI page.</p>	<p>Elliot (telliott@tamu.edu), and they will arrange it.</p>
<p>IV. Update from CERD Post-Award</p>	<p>Clayton Holle provided an update from CERD post-award. Their office continues to stay busy with awards.</p> <p>Clayton announced that they have now hired a replacement for their Business Coordinator III position. It was an internal hire, so they will now be performing a search to fill the position that was left open. If anyone is not receiving a timely response, let Clayton know and he can help take care of it.</p>	
<p>X. Other Business</p>	<p>No other business was presented.</p>	
<p>VIII. Other Announcements/Updates</p>	<p>This was the last CEHD CPI meeting of the 20-21 Academic Year. Next year, CEHD CPI will be led by the new CPI Chair Dr. Ben Herman. All CEHD faculty are invited to attend these meetings, and can email asavell@tamu.edu for the information.</p> <p>The CPI members thanked Dr. Gilreath for all her efforts and for an outstanding year as Chair.</p>	

Maestro Updates for Researchers

February 2021



Agenda

- ▶ Researcher Data Workflow Enhancement
(Minimize administrative burden for the researchers)
- ▶ Budget Forecasting
- ▶ Maestro Interfaces

Researcher Data Workflow Enhancement Project Goals

- ▶ Improving existing dashboards and system navigation
 - ▶ Change the research compliance statement to be more intuitive, descriptive and user friendly to researchers
- ▶ Automating manual processes
 - ▶ Researcher input on proposal personnel
 - ▶ The approval of project level changes
 - ▶ Project personnel review and update
- ▶ Eliminating previously required steps to reduce investigators burden
 - ▶ Remove complex compliance statement and long list of reporting codes from proposal setup and move to award stage

Worklist – Action Needed

► 142K Worklist page visits in the last year

The screenshot shows the Maestro 8.9.3 dashboard interface. The top navigation bar is blue and contains the Maestro logo, a search bar, and several menu items: Dashboard, Account, Proposal, Project, Worklist (circled in red), and Maestro. Below the navigation bar, the dashboard is divided into several sections:

- Action Needed:** A section with a clipboard icon and a red circle containing the number 3. It lists three items: 1 Proposal Compliance, 1 Reporting Code, and 1 Project Deliverable.
- Proposal Alerts:** A section with a lightbulb icon and a red circle containing the number 1. It displays a "Proposal Due" alert for proposal 2105091, which is due in -10 days. The title is TBD and the sponsor is Qatar Environment and Energy Research...
- Researcher Portal Classes:** A section with a microphone icon. It states that Maestro training is currently conducted via Zoom and provides links for "Videos and Documentation" and "Scheduled Classes".
- Contacts:** A section with a telephone icon. It lists contact information for "Proposal Development" (Admin Org: SRS, Justin Allison, 979-847-6101, j-allison@tamu.edu) and "Project Administration" (Admin Org: SRS, TEES-Electrical And Computer Engineering, phone: 979-845-8725).
- Project Alerts:** A section with a calendar icon and a red circle containing the number 1. It displays an "Open Modification Due" alert for project M1603325, which is due after the end date "14-AUG-18". The title is "Utility systems Inc. (USI)-Smart Grid..." and the sponsor is "Various-Private Profit".
- Researcher Links:** A section with a list of links: Monthly Statement, Favorite Accounts, Payroll Allocations, Person Payroll, and Researcher Performance.

Proposal Routing and Approval Changes

The screenshot displays the Maestro 8.x.x dashboard interface. At the top, there is a blue navigation bar with the Maestro logo, a search bar, and several menu items: Dashboard, Account, Proposal, Project, and Disclosure. Below the navigation bar, the dashboard is divided into four main sections:

- Action Needed:** A section with a clipboard icon and a red arrow pointing to the first item. It contains a list of tasks:
 - 1 Proposal Approval
 - 2 Project Compliance
 - 1 Project Approval
 - 3 Project Reporting Code
- Proposal Alerts:** A section with a lightbulb icon and a green badge with the number 2. It displays a notification: "Proposal Due Proposal (2103625) is Due in -4 days". Below this, it lists "Title: test" and "Sponsor: Firehouse Subs Public Safety Foundat...". At the bottom of this section are navigation links: "< Previous (1/2) Next >".
- Contacts:** A section with a telephone icon. It lists contact information for "Proposal Development" and "Project Administration".

Proposal Development:
Admin Org: SRS
TAMU-Vice President For Research
Justin Allison, 979-847-6101
j-allison@tamu.edu

Project Administration:
Admin Org: SRS
AL EVT Office Of The Director
- Project Alerts:** A section with a graduation cap icon and a green badge with the number 13. It displays a notification: "Open Modification Due Open modification after end date '21-JAN-21'. Project (M2100737)". Below this, it lists "Title: testrc" and "Sponsor: DexCom, Inc."

Proposal Routing Changes


- Main PI always receive the proposal document at the first step in routing and approval process.
- Personnel, Compliance and Reporting Code sections are validated and completed by the PI as a part of the proposal routing.

The screenshot displays the 'My Work List' interface. At the top, there are tabs for 'Current Items', 'Completed Items', and 'Notifications'. Below this, the 'Proposal Basic Info' section shows details for a 'Current Proposal' with ID 2103563, Type 'New', PI 'Leonarda Horvat', and Status 'In Development'. The title is 'Machine Learning in Research Data Centers'. Action buttons for 'Print', 'Back', 'Save', and 'Cancel' are visible. A section titled 'ATTN. DEPT. HEADS, DIRECTORS, DEANS:' contains a warning message: 'By clicking Approve button, you certify that you have received this proposal and all accompanying documents, you are aware of all requirements of this project and are committed to providing them, except as noted.' Below this is a text area for 'Notes or Reason For Rejection'. A yellow warning icon indicates: 'You must complete and review proposal's Personnel, Compliance, and Reporting Code sections before approving this proposal.' The 'Additional Rejection Notification Users' section includes a table with columns for 'Recipient Name', 'Member', 'Organization', and 'Email Address'. The table is currently empty, showing 'No data to display.' and 'Columns Hidd... 4'. At the bottom, there are 'Approve' and 'Reject' buttons.

Proposal Routing Personnel

- ▶ PI can edit 'FCOI Investigator' and 'Credit (%)' during proposal routing.
- ▶ Total of 'Credit (%)' must be equal to 100%.
- ▶ 'FCOI Investigator' will be always marked Yes for PI, Co-PI, and Co-I personnel and PI can't change it.

Proposal Personnel

Name	Member	Organization	Title	Role	FCOI Investigator 	* Credit(%)	PI Eligible	Notes
Leonarda Horv	TAMU	Research Infor	Director, Informatio...	PI	<input checked="" type="checkbox"/>	<input type="text" value="50.00"/>	×	
Tye Rougas	TAMU	Research Infor	Assistant Director, ...	Co-PI	<input checked="" type="checkbox"/>	<input type="text" value="20.00"/>	×	
Donovan Sherr	TAMU	Research Infor	Associate Director, ...	Co-Investig...	<input checked="" type="checkbox"/>	<input type="text" value="20.00"/>	×	
Catherine Yanc	TAMU	Research Infor	End User Support S...	Other Perso...	<input type="checkbox"/>	<input type="text" value="10.00"/>	×	
						100.00		

Proposal Routing Compliance


- Only 3 compliance items required at this level
- Enhanced layout to be more user friendly.

Proposal Compliances

▲ Compliance Items

 Set All to No


★ Does this proposal involve **Human Subjects**? Yes No

 Contact

Definition: 45 CFR 46.102 -Human subject means a living individual about whom an investigator (whether profes... [More](#)

Related URL: <http://policies.tamus.edu/15-99-01.pdf>

★ Does this proposal involve **Animals (Vertebrates)**? Yes No

 Contact

Definition: Includes research, teaching or testing activities with 1) live vertebrate animals, or 2) vertebr... [More](#)

Related URL: <https://policies.tamus.edu/15-99-07.pdf>

★ Does this proposal involve **International Collaboration**? Yes No

 Contact

Definition: An international collaboration is a research relationship with another foreign researcher or spo... [More](#)

▶ Compliance Items For Administrator Only

Proposal Routing Reporting Codes

- ▶ NSF Higher Education and THECB Survey codes are now required on project level only

Proposal Reporting Code

Reporting Codes

Deepwater Horizon Oil Spill	No	?
Underrepresented Student Included	No	
STEM Education Program	No	?
COVID-19 Related	No	?

Project Compliance Task

The screenshot displays the Maestro 8.x.x dashboard. The top navigation bar includes a search field, a help icon, and several menu items: Dashboard (globe icon), Account (stack of books icon), Proposal (lightbulb icon), Project (folder icon), and Disclosure (double arrows icon). The main content area is divided into four sections:

- Action Needed:** A clipboard icon with a '7' badge is followed by a list of tasks: 1 Proposal Approval, 2 Project Compliance (highlighted with a red arrow), 1 Project Approval, and 3 Project Reporting Code.
- Proposal Alerts:** A lightbulb icon with a '2' badge is followed by a notification: "Proposal Due Proposal (2103625) is Due in -4 days". Details include "Title: test" and "Sponsor: Firehouse Subs Public Safety Foundat...". Navigation links for "Previous (1/2) Next" are at the bottom.
- Contacts:** A telephone icon is followed by the heading "Contacts". It lists "Proposal Development:" with contact info for Justin Allison (979-847-6101, j-allison@tamu.edu) and "Project Administration:" with contact info for the Admin Org: SRS.
- Project Alerts:** A lightbulb icon with a '13' badge is followed by a notification: "Open Modification Due Open modification after end date '21-JAN-21'. Project (M2100737)". Details include "Title: testrc" and "Sponsor: DexCom, Inc."



Project Compliance Task and Notifications

- ▶ When project is created from proposal:
 - ▶ Project Compliance items will be synchronized with the proposal.
 - ▶ PI immediately gets notification and associated Project Compliance task to complete **full** compliance statement.
- ▶ Once task completed, for any item marked 'Yes' (applicable) system will send notification to the respective Compliance Official for that item with data provided in the statement.

Project Compliance Statement




▲ Compliance








Does your project involve any of the compliance groups listed below?

- If 'No', then click on  **Certify No Compliance Items**
- If 'Yes', please complete compliance items and then click on  **Complete**

▲ Compliance Items

 Collapse All  Expand All

- ▶ **Human** 
- ▶ **Animal** 
- ▶ **Biosafety** 

Includes research use of radioactive materials, radiation producing devices, lasers, explosives, firearms, unmanned aircraft systems as well as regulated hazardous materials and scientific diving.
- ▶ **Controlled Substances** 
- ▶ **Environmental Health and Safety** 
- ▶ **Export Control / International Activity** 
- ▶ **Privacy / Data Protection** 
- ▶ **Intellectual Property** 
- ▶ **Nepotism** 
- ▶ **Facilities** 

Compliance Statement Item Detail

Compliance Items Collapse All Expand All

- ▶ Human ?
- ▶ Animal ✓ ?
- ▶ Biosafety ?

★ Does this project involve **Recombinant DNA?** Yes No Contact

Definition: In the context of the NIH Guidelines, recombinant DNA molecules are defined as either: (1) molec... [More](#)

Related URL: <http://policies.tam.us.edu/15-99-06.pdf>

★ Does this project involve **Human Embryonic Stem Cells?** Yes No Contact

Definition: Pluripotent stem cells derived from early stage human embryos, up to and including the blastocyst... [More](#)

Related URL: <https://stemcells.nih.gov/>

★ Does this project involve **Select Agents and Toxins?** Yes No Contact

Definition: Select agents are pathogens or biological toxins which have been declared by the U.S. Department ... [More](#)

Related URL: <http://www.selectagents.gov>

★ Does this project involve **Biohazards?** Yes No Contact

Definition: Any pathogens or potential pathogens of human, animals or plants; materials potentially containin... [More](#)

Related URL: <https://policies.tam.us.edu/15-99-06.pdf>

★ Does this project involve **Planned Environmental Release of Infectious or Biohazardous Organisms?** Contact

Definition: Release into the environment of infectious material, hazardous chemicals, radioactive material. [More](#)

★ Does this project involve **Genetically Modified Organisms?** Contact

Definition: A genetically modified organism is defined as a living organism, i.e., microorganism, animal or p... [More](#)

★ Does this project involve **Planned Environmental Release of Genetically Modified Organism?** Yes No Contact


Definition: Release into the environment Genetically Modified Organisms. [More](#)

★ Does this project involve **Involves use of Biosafety Level 3 (BSL-3) Facility?** Yes No Contact

Definition: A BSL-3 laboratory is a laboratory that includes clinical, diagnostic, teaching, research or prod... [More](#)

Related URL: <https://www.phe.gov/s3/BioriskManagement/biosafety/Pages/Biosafety-Levels.aspx>

- ▶ Controlled Substances ?
- ▶ Environmental Health and Safety ?
- ▶ Export Control / International Activity ?
- ▶ Privacy / Data Protection ?
- ▶ Intellectual Property ?
- ▶ Nepotism ?
- ▶ Facilities ?



Compliance Statement Item Detail

Compliance Items ⌵ Collapse All ⌶ Expand All

▶ Human ?

⌵ Animal ✓ ?

★ Does this project involve **Animals (Vertebrates)?** Yes No Contact

Definition: Includes research, teaching or testing activities with 1) live vertebrate animals, or 2) vertebr... [More](#)

Related URL: <https://policies.tamus.edu/15-99-07.pdf>

Additional Data + Add ?

Species	Animal Use Protocols	
<input type="text" value="mice"/>	<input type="text" value="IACUC 2018-0138"/>	✗

Optional Notes for Compliance Officials

Optional Documents Upload ?

✗

✗

▶ Biosafety ?

▶ Controlled Substances ?

▶ Environmental Health and Safety ?

▶ Export Control / International Activity ?

▶ Privacy / Data Protection ?

▶ Intellectual Property ?

▶ Nepotism ?

▶ Facilities ?

Complete Print Save ✗ Cancel

Project Reporting Codes Task

The screenshot displays the Maestro 8.x.x dashboard. The top navigation bar includes a search field, a help icon, and menu items for Dashboard, Account, Proposal, Project, and Disclosure. The main content area is divided into four sections:

- Action Needed:** A list of tasks with a total count of 7. The tasks are: 1 Proposal Approval, 2 Project Compliance, 1 Project Approval, and 3 Project Reporting Code. A red arrow points to the '3 Project Reporting Code' item.
- Proposal Alerts:** A notification for a 'Proposal Due' (2103625) in -4 days. The title is 'test' and the sponsor is 'Firehouse Subs Public Safety Foundat...'. Navigation links for 'Previous (1/2) Next >' are visible at the bottom.
- Contacts:** A section for 'Proposal Development' listing Justin Allison (979-847-6101, j-allison@tamu.edu) and 'Project Administration' listing the Admin Org: SRS.
- Project Alerts:** A notification for an 'Open Modification Due' after the end date '21-JAN-21' for Project (M2100737). The title is 'testrc' and the sponsor is 'DexCom, Inc.'.

Project Reporting Codes



Project (M2100794)

Title: New Project Created
PI: Ashraf Al-Hnaiti
Administrator:

Sponsor Name: DexCom, Inc.
Lead Organization: TTI - Sponsored Research Services
Phone:

Sponsor Award Number:
Performance Period: 04-Feb-2021 - 28-Feb-20
Email:

Higher Education Survey and Other Reporting Codes

Activity 1A Conduct of Research and Development

NSF Science and Engineering Field ?

THECB Science and Engineering Field ?

THECB Character of Work 4A Basic Research ?

THECB Selection Process 5A Peer-Reviewed ?

Deepwater Horizon Oil Spill No ?

Underrepresented Student Included No ?

STEM Education Program No ?

COVID-19 Related No ?

THECB Special Areas of Interest

Action View Detach

Selected	Code	Title
<input type="checkbox"/>	3D	AIDS Research
<input type="checkbox"/>	3P	Adult Stem Cell Research
<input type="checkbox"/>	3I	Aerospace Technology
<input type="checkbox"/>	3MA	Aging - HSC Only
<input type="checkbox"/>	3E	Biotechnology
<input type="checkbox"/>	3MB	Cancer - HSC Only
<input type="checkbox"/>	3C	Cancer Research
<input type="checkbox"/>	3MC	Cardiovascular Research - HSC Only
<input type="checkbox"/>	3MD	Child Health and Human Development - HSC Only
<input type="checkbox"/>	3A	Energy
<input type="checkbox"/>	3J	Environmental Science and Engineering
<input type="checkbox"/>	3B	Food, Fiber, Agricultural Products
<input type="checkbox"/>	3N	Human Embryonic Stem Cell Research
<input type="checkbox"/>	3G	Manufacturing Technology
<input type="checkbox"/>	3F	Materials Science and Engineering
<input type="checkbox"/>	3ME	Mental Health - HSC Only
<input type="checkbox"/>	3H	Microelectronics and Computer Technology
<input type="checkbox"/>	3K	Water Resources

Complete Back Save Cancel

Project Changes Approval

The screenshot displays the Maestro 8.x.x dashboard. The top navigation bar includes a search field, a help icon, and several menu items: Dashboard, Account, Proposal, Project, and Disclosure. The main content area is divided into four sections:

- Action Needed:** A clipboard icon with a '7' badge indicates seven items. The list includes: 1 Proposal Approval, 2 Project Compliance, 1 Project Approval, and 3 Project Reporting Code. A red arrow points from the '1 Project Approval' item to the 'Proposal Alerts' section.
- Proposal Alerts:** A lightbulb icon with a '2' badge indicates two alerts. The first alert is 'Proposal Due: Proposal (2103625) is Due in -4 days'. It has a title of 'test' and a sponsor of 'Firehouse Subs Public Safety Foundat...'. Navigation links for 'Previous (1/2) Next >' are visible at the bottom.
- Contacts:** A telephone icon is followed by the heading 'Contacts'. It lists contact information for 'Proposal Development' (Admin Org: SRS, TAMU-Vice President For Research, Justin Allison, 979-847-6101, j-allison@tamu.edu) and 'Project Administration' (Admin Org: SRS, AL EYT Office Of The Director).
- Project Alerts:** A graduation cap icon with a '13' badge indicates 13 alerts. The first alert is 'Open Modification Due: Open modification after end date "21-JAN-21". Project (M2100737)'. It has a title of 'testrc' and a sponsor of 'DexCom, Inc.'.

Project Approval

Current Items
Completed Items

Project Approval: Correction

Approve
 Reject
 Back

▲ Project (M2100781) [← Project List](#)

Title: Project Title

Sponsor Name: DexCom, Inc.

Sponsor Award Number:

PI: Leonarda Horvat

Lead Organization: TAMU - Research Information Syster

Performance Period: 28-Feb-2021 - 28-

Administrator:

Phone:

Email:

Description IDC rate has been changed from what was proposed.

Summary Notes IDC rate has been changed during negotiation to 30% and associated waived amount to \$34,340.35

Approve project action: Correction or reject it and enter rejection notes / reason.

Notes or reason for rejection

▲ Documents

Action ▾ View ▾

 Run Short SPS Report

 Detach

Document	Document Type	Description	View Restriction	Updated By
Sample.docx	Contract		No Restriction	Tye Rougas

Columns Hi... 3

Project Personnel Review

The screenshot displays the Maestro 8.x.x.x dashboard. The top navigation bar includes a search field, a help icon, and menu items for Dashboard, Account, Proposal, Project, and Disclosure. The main content area is divided into four sections:

- Action Needed:** A list of tasks with a total count of 12. The tasks are: 6 Project Compliance, 1 Project Task, 2 Project Personnel Review (highlighted with a red arrow), and 3 Project Reporting Code.
- Proposal Alerts:** A notification for a 'Proposal Due' (2103503) in -3 days, with a count of 2. The title is 'Proposal Reporting Code' and the sponsor is 'Firehouse Subs Public Safety Foundat...'. Navigation links for 'Previous (1/2) Next' are at the bottom.
- Contacts:** A section for 'Proposal Development' listing Justin Allison (979-847-6101, j-allison@tamu.edu) and 'Project Administration' listing Admin Org: SRS.
- Project Alerts:** A notification for an 'Open Modification Due' after the end date '31-JAN-21' for Project (M2100729), with a count of 14. The title is 'Full cycle Reporting Code Testing' and the sponsor is 'ECS Southwest, LLP'.

Personnel Review

Personnel Review Task Text

Please review the personnel screen for accuracy of your FCOI List of Investigators, in compliance with TAMUS Policy 15.01.03.



- Ensure all TAMUS personnel on the project that meet the definition of FCOI Investigator are listed and marked "FCOI Investigator."
- If an individual is no longer on the project, include an end date.
- If an individual is not listed, click the plus sign to create a new record.
- Adjust % credit for PI, Co-PI(s), or Co-I(s) for award credit, if needed – must total 100%.
- Click "Complete" once necessary changes are made, or if no changes are needed, to complete this task in your worklist.

Office of Research may not be authorized to execute the contract until the FCOI List of Investigators is verified or finalize award set-up unless all investigators involved in the proposed work have a FCOI disclosure on file and have completed required FCOI training.






No expenditures will be allowed until the System Member Conflict of Interest Official has determined no FCOI exists or that any identified FCOI is manageable under the terms of a management plan that has been adopted and implemented.

Personnel

Action View       Complete  Detach

PI Name	Member	Organization	Role	Credit (%) ?	FCOI Investigator ?	FCOI Comple	Begin Date	End Date ?	Notes ?
Leonarda Horva 	TAMU	Research Information Systems	PI 	50.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	18-Feb-2022		
Tye Rougas 	TAMU	Research Information Systems	Co-PI 	40.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	18-Feb-2022		
Catherine Yancy 	TAMU	Research Information Systems	PostDoc 	10.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	18-Feb-2022		
Total Credit (%)				125.00					

Columns Hidden 10

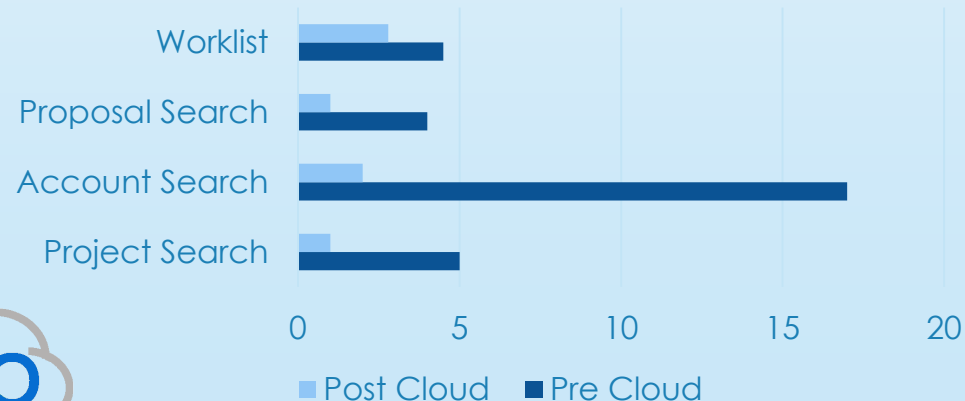
 Complete  Audit Trail  Back  Save  Cancel

Maestro Move to Cloud (5/2020)



- Hybrid cloud (Cloud at Customer)
- Two Oracle Exadata Machines in separate geographical locations (College Station and Austin tier 3 data centers)
- Performance improvement
- Shared by 4 TAMUS Institutions and more on the way

Performance Improvements



Budget Forecasting Project Status



Project Charter

- ▶ Develop enterprise-wide research budget forecasting solution in Maestro
- ▶ Audience
 - ▶ Researchers
 - ▶ TAMUS research administration community
- ▶ Agile approach – development and implementation in phases
- ▶ Working Group, under the oversight of the Leadership Committee, is working on
 - ▶ Defining the scope and setting in/out boundaries
 - ▶ Brainstorming potential solutions
 - ▶ Planning the project
 - ▶ Approving project milestones deliveries

Working Group Members

Name	Organization/Member Affiliation	Role
Brooke Schneider	SRS	Co-Chair
Carolyn Engledow	SRS	Co-Chair
Tamara Lopez	SRS	Co-Chair
Leonarda Horvat	Maestro	Co-Chair
Mohammad Al-Banna	Maestro	Maestro
Dr. Roel Lopez	Agrilife	Researcher / Institute Representative
Dr. David Threadgill	HSC / College of Agriculture	Researcher / Center and Institute Representative
John Winkler	TEES- Petroleum Engineering	Business Representative
Monica Ocon	HSC - Microbial Pathogenesis and Immunology	Business Representative
Adriana De La Cruz Burnett	TAMU- College of Education	Business Representative
Robbie Lukeman	Agrilife – Animal Science	Business Representative
Sarah McLaughlin	TAMU- Veterinary Medicine	Business Representative
Laura Hollingsworth	SRS	Project Administration
Leslie Krueger	SRS	Project Administration
Evan Bryant	SRS	Director, Audit
Andy Hinton	TEES	System Member Administrator
Loree Lewis	Agrilife	System Member Administrator
Jane Zhou	TTI	System Member Administrator
Sharmeen Ahmed	TAMUCC	System Member Administrator/Regional Representative

Working Group Past Activity

- ▶ Collected project expectation from the team members
- ▶ Previewed some similar solutions (TTI RIMS and Workday Forecasting Module)
- ▶ Previewed departmental budget forecasting examples from HSC, TAMU, TAMUCC, AgriLife, and TEES
- ▶ Discussed and Compiled Requirements
- ▶ Reviewed Project Plan and Phase I mockup screens

Phases

Phase 1	Phase 2	Phase 3
Main Dashboard	Detail Forecast for all Budget categories (except Subcontracts)	Detail Forecast for Subcontracts
Portfolio Management	Reconcile how expenditures are categorized by sponsor categories	Ability to forecast on future accounts (in negotiation)
Detailed personnel forecast Adding/Removing personnel position	Forecasting Reports, By Person on multiple accounts	Projection of expenses at subcode level
Summary forecast for other budget categories and IDC projection	Percent of spent on each category	Sub-award burn rate
Ability to add narratives on all levels	?	?
Forecast versioning		
Security and forecast sharing with designated users based on roles		

Module Security

Role	Access
PI	<ul style="list-style-type: none">• Can view/forecast all accounts under a project were is set as main PI
CO-PI	<ul style="list-style-type: none">• Can view/forecast only accounts set as the primary responsible person for
Research Business Administrator	<ul style="list-style-type: none">• Can view/forecast accounts for all PIs in specific department• Can view/forecast accounts for specific PI based on access permissions
Project Administrator	<ul style="list-style-type: none">• View only

Dashboard



Manage Portfolio

maestro B.X.X

Search

Dashboard Account Proposal Project Worklist Forecast

m Maestro

Tye Rougas









Select PI (Pi user)

02/08/21 11:32 AM | Feedback

Dashboard **Manage Portfolio** Portfolio Details Forecast Detail

+ Create Portfolio

Portfolio Name

Portfolio Name	Description	
 Guzman's Projects	DOE- Office of Electricity, State of Texas - State Appropriations	 Manage  Details  Delete
 M2000281		 Manage  Details  Delete

Portfolio Management

maestro B.X.X

 Tye Rougas

 Select PI (PI user)

[Search](#)

m Maestro

 02/08/21 11:32 AM | [Feedback](#)

[Dashboard](#)
Manage Portfolio
[Portfolio Details](#)
[Forecast Detail](#)

Maintain Portfolio

Name: Guzman's Projects

Description

Accounts
[Projects](#)

Add	Account	Member	Dept	Sponsor	Title	Total Balance (Real Time)	Start Date	End Date
<input type="checkbox"/>								
<input checked="" type="checkbox"/>	517800-00001	TEES	AERO	NASA-Goddard Space Flight Center	Compact Optomechanical Accelerometers For Future Geodesy Missions	\$111,711.61	1-Oct-2020	30-Sep-2022
<input checked="" type="checkbox"/>	517700-00002	TEES	AERO	Department of Defense	Optomechanical Gravimeters And Gravity Gradiometers	\$43,315.38	30-Sep-2020	30-Sep-2022
<input checked="" type="checkbox"/>	517700-00001	TEES	AERO	Department of Defense	Optomechanical Gravimeters And Gradiometers	\$132,049.94	15-Aug-2020	29-Sep-2022
<input type="checkbox"/>	517100-00003	TEES	AERO	National Science Foundation	51.5% Idc - Ligo Research Support: Compactoptomechanical Seismic Sensors	\$96,204.00	15-Aug-2020	31-Jul-2022
<input type="checkbox"/>	517100-00002	TEES	AERO	National Science Foundation	Ligo Research Support: Compact Optomechanical Seismic Sensors	\$79,593.05	18-Aug-2020	31-Jul-2021
<input type="checkbox"/>	517100-00001	TEES	AERO	National Science Foundation	50% Idc - Ligo Research Support: Compactoptomechanical Seismic Sensors	\$12,646.98	15-Aug-2020	31-May-2021
	292113-20000	TAMU	CLEN	AUF - Available University Funds	Cri Startup- Guzman	\$34,156.30		
	241784-00000	TAMU	AERO	University Authorized Tuition-Designated Tuition Institutional Sources	Faculty Startup - Guzman	\$57,554.48		
	232020-00000	TEES	AERO		Pi Incentive - Felipe Guzman	\$6,496.96		
	132153-00015	TAMU	AERO	Not Sponsored	Salary Release - Guzman	\$0.00		

Portfolio Management

maestro 8.3.0x

Dashboard Account Proposal Project Worklist Forecast Maestro

Search Tye Rougas Select PI (PI user) 02/08/21 11:32 AM Feedback

Dashboard **Manage Portfolio** Portfolio Details Forecast Detail


Maintain Portfolio

Name: Guzman's Projects Description

Accounts Projects

Add	Project Number	Member	Dept	Sponsor	Title	Total Balance (Real Time)	Role/Primary PI
<input checked="" type="checkbox"/>	M2100867	TEES	AERO	University of Arizona	Quantum-Enhanced	\$51,654.31	PI
<input type="checkbox"/>	518210-00000	TEES				\$0.00	✓
<input checked="" type="checkbox"/>	518210-00001	TEES				\$51,654.31	✓
<input checked="" type="checkbox"/>	M2100669	TEES	AERO	University of Arizona	NSF Convergence Accelerator-	\$32,705.09	PI
<input type="checkbox"/>	518020-00000	TEES				\$0.00	✓
<input checked="" type="checkbox"/>	518020-00001	TEES				\$24,914.76	✓
<input checked="" type="checkbox"/>	518020-00002	TEES				\$7,790.33	X
<input checked="" type="checkbox"/>	M2003216	TEES	AERO	National Science	LIGO Research Support: Compact	\$188,432.57	PI
<input type="checkbox"/>	517100-00000	TEES				\$0.00	✓
<input checked="" type="checkbox"/>	517100-00001	TEES				\$12,635.52	✓
<input checked="" type="checkbox"/>	517100-00002	TEES				\$79,593.05	✓
<input checked="" type="checkbox"/>	517100-00003	TEES				\$96,204.00	✓
<input checked="" type="checkbox"/>	M2100403	TEES	AERO	NASA-Goddard Space	Compact optomechanical	\$150,000.00	PI
<input type="checkbox"/>	517800-00000	TEES				\$0.00	✓
<input checked="" type="checkbox"/>	517800-00001	TEES				\$111,711.61	✓
<input type="checkbox"/>	M2100287	TEES	AERO	NASA - Jet Propulsion	Texas Intelligent Space Systems	\$74,142.12	Co-PI
	517100-00000	TEES				0	X
	517100-00001	TEES				6537.75	X
	517100-00002	TEES				13813.04	X
<input type="checkbox"/>	517100-00003	TEES				\$53,791.33	✓

Portfolio Details


8.x.x
Search
Dashboard
Account
Proposal
Project
Worklist
Forecast
m Maestro
Tye Rougas
Select PI (Pi User)
02/08/21 01:35 PM
Feedback

[Dashboard](#)
[Manage Portfolio](#)
[Portfolio Details](#)
[Forecast Detail](#)



Portfolio Details

Portfolio Name:

Account	Project Id	Sponsor	Title	Member	Total Budget	Total Spent	%Spent	Months Remaining	Default Forecast Total	Notes
517800-00001	M2100867	University of Arizona	Quantum-Enhanced Optomechanical Accelerometers	TEES	\$53,000.00	\$1,000.00	1.89%	24	\$51,000.00	
517700-00002	M2100669	University of Arizona	NSF Convergence Accelerator-Track C: Quantum-interconnected optomechanical transducers for	TEES	\$120,000.00	\$86,092.00	71.74%	24	\$122,000.00	Need to spend fast, This project also has a split for Dr. Lin in ELEN.
517700-00001	M2003216	National Science Foundation	LIGO Research Support: Compact optomechanical seismic sensors	TEES	\$230,929.00	\$42,212.00	18.28%	15	\$190,000.00	
517100-00003	M2100403	NASA-Goddard Space Flight Center	Compact optomechanical accelerometers for future geodesy	TEES	\$150,000.00	\$38,287.00	25.52%	15	\$38,200.00	
517100-00002	M2100336	Department of Defense	Optomechanical Gravimeters and Gradiometers	TEES	\$373,202.00	\$196,905.16	52.76%	15	\$370,000.00	
517100-00001	M2100287	NASA - Jet Propulsion Lab	Texas Intelligent Space Systems (TISS) Initiative	TEES	\$200,000.00	\$125,753.78	62.88%	15	\$199,999.00	Need to spend fast
292113-20000	M2100139	DOD-Navy-Naval Surface Warfare Center	Novel position, navigation, and timing and adaptive flight controls	TEES	\$500,000.00	\$90,000.00	18.00%	6	\$450,000.00	

Versioning

maestro B.X.X

 Tye Rougas ▾
5 Select PI (PI User) ✕
m Maestro 02/08/21 01:35 PM | Feedback

[Dashboard](#) [Manage Portfolio](#) [Portfolio Details](#) [Forecast Detail](#)

[← Back](#) [Save](#) [✕ Cancel](#)

Account (517700-00001)

<p>Title: Optomechanical Gravimeters And Gradiometers Sponsor: Department of Defense Status: Active</p>	<p>Project: M2100336 Primary PI: Guzman, Felipe Member: TEES Funding Period: 15-Aug-2020 to 29-Sep-2022</p>	<p>Administrator: Schmidt, Micah Phone: (979) 862-5969 Email: Micah.Schmidt@tamu.edu</p>
--	--	---

Add, Edit or Delete Forecast Version

Forecast Version

Forecast Name	Start of Plan	End of Plan	Date created	
Default Forecast	1-Sep-2020	31-Aug-2023	8-Feb-2021	✕
May Forecast	1-May-2021	31-Aug-2022	8-Oct-2021	✕

+ Add

General

Name

Description

Notes

Date created 01-May-2021

Options

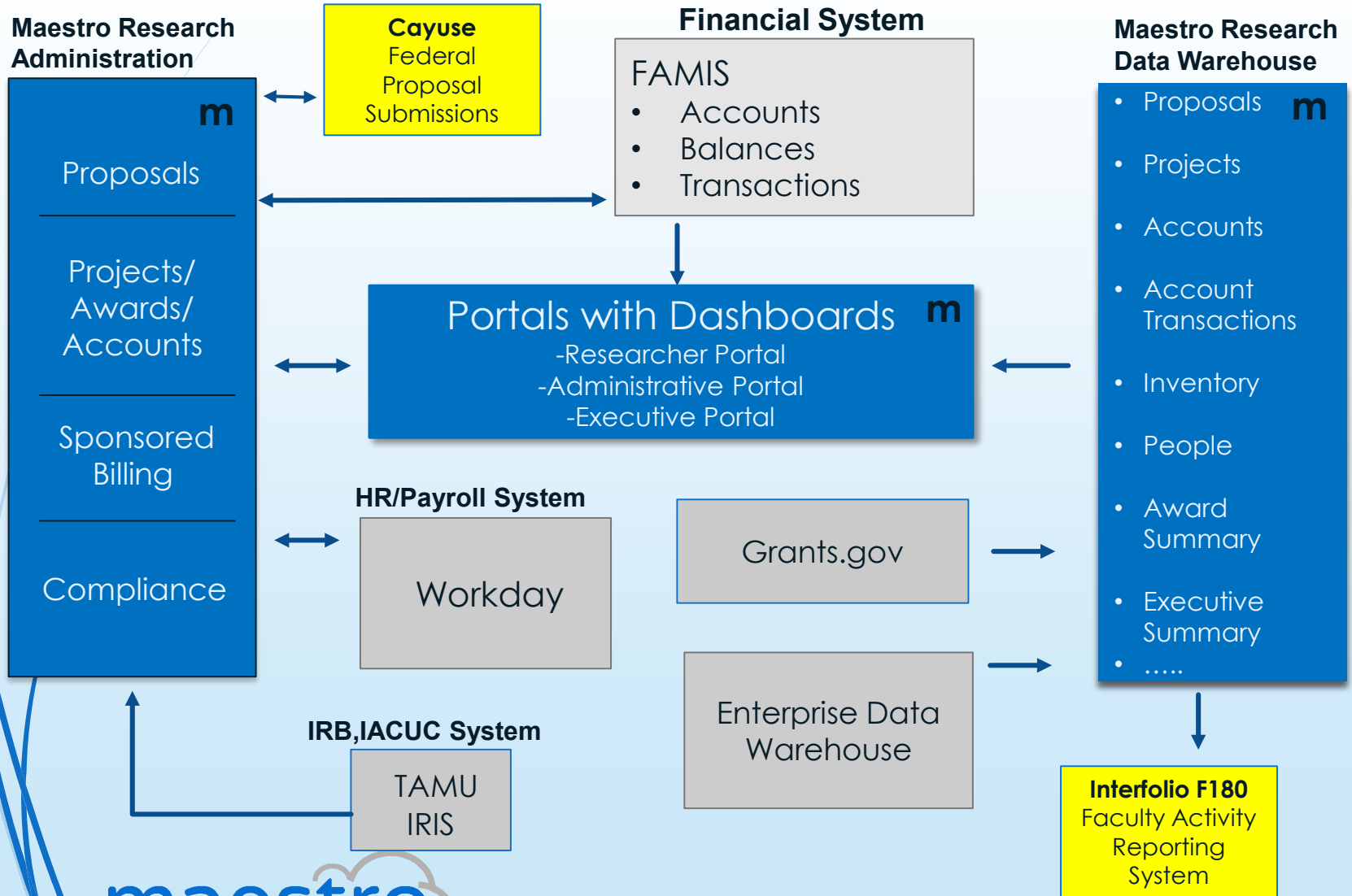
Lock version

Default

Start of plan

End of plan

Maestro Interfaces



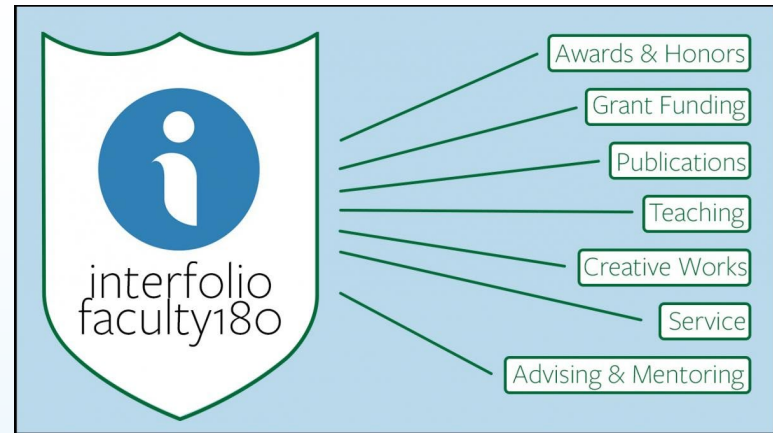
Cayuse

- 762 proposals submitted since 2/2020 utilizing Cayuse
- submitted to 16 federal agencies (NIH, USDA, ...)

The screenshot shows the Cayuse application interface. At the top, there is a navigation bar with icons for Relationship, General, Personnel, Reporting Code, Compliance, Document, Waiver Request, Budget & Cost, and Administration. Below this, the 'General' tab is selected, showing options for FCOI Status, Abstract and Keywords, and Subrecipient. A 'Revisions Navigation' section includes a 'Cayuse' dropdown menu (circled in red), 'Audit Trail', 'Save', and 'Cancel' buttons. Proposal details are displayed: Proposal Number 2001213, PI Joe Arosh, Lead Organization TAMU Veterinary Integrative Biosciences, Proposal Status Submitted To Sponsor (Date 07-Nov-2019), and Routing Status Approved (Date 12-Nov-2019). A 'History' button is visible for both status sections.

The screenshot shows the 'Proposals (S2S)' form in the Cayuse system. The form is titled 'APPLICATION FOR FEDERAL ASSISTANCE SF 424 R&R'. It includes a left-hand navigation pane with checkboxes for various sections: SF424 RR, RR Performance Sites, RR Other Project Information, RR Key Persons, RR Budget, PHS Human Subjects and C, PHS 398 Modular Budget, and RR Subaward Budget Attach. The main form area contains several sections: 2. DATE SUBMITTED (11/07/2019), Applicant Identifier (Arosh 2001213), 3. DATE RECEIVED BY STATE, State Application Identifier, 1. TYPE OF SUBMISSION (Pre-application, Application, Changed/Corrected Application), 4. a. Federal Identifier, b. Agency Routing Number, c. Previous Grants.gov Tracking ID, 5. APPLICANT INFORMATION (Legal Name: Texas A&M University, Department: Sponsored Research Services, Street1: 400 Harvey Mitchell Parkway, South, City: College Station, State/Province: Texas, Country: United States, Organizational DUNS: 020271826, Division: Division of Research, Street2: Suite 300, County/Parish: Brazos, Zip/Postal Code: 77845-4375), and Person to be contacted on matters involving this application.

Interfolio



Weekly Maestro feed for the system consists of records based on the all personnel listed in:

- **Proposals** (personnel role, title, sponsor, start and end date, type of funding, IDC rate, and total proposed amount)
- **Awards** (personnel role, title, sponsor, award id, proposal number, start and end date, type of funding, IDC rate, PI percent credit, and total awarded amount)

AgriLife started using this interface in Fall of 2020. TAMU is getting ready to use it.

February, 2021 Metrics from Maestro

Proposals Submitted Before Routing Started and Before Routing Completed

Admin Org	Submitted Date	Lead Member	Lead Org	Submttd Bfr Rtng Started	Submttd Bfr Rtng Compltd
SRS	24-Feb-21	TAMU	EAHR	0	1
SRS	8-Feb-21	TAMU	EPSY	0	1
SRS	5-Feb-21	TAMU	EPSY	0	1
SRS	9-Feb-21	TAMU	HLKN	0	1
SRS	16-Feb-21	TAMU	HLKN	0	1
SRS	5-Feb-21	TAMU	HLKN	0	1
SRS	1-Feb-21	TAMU	HLKN	0	1
SRS	16-Feb-21	TAMU	HLKN	0	1
SRS	12-Feb-21	TAMU	HLKN	1	1
SRS	1-Feb-21	TAMU	HLKN	0	1
SRS	1-Feb-21	TAMU	HLKN	0	1
SRS	4-Feb-21	TAMU	HLKN	0	1
SRS	1-Feb-21	TAMU	HLKN	0	1
SRS	9-Feb-21	TAMU	TLAC	1	1
SRS	25-Feb-21	TAMU	TLAC	0	1
SRS	25-Feb-21	TAMU	TLAC	0	1
SRS	25-Feb-21	TAMU	TLAC	0	1

February, 2021 Metrics from Maestro

Login Timeframes

Member	Org Name	Submission Date	Logged In Date	Deadline Date	Deadline Type	Business Days
TAMU	TLAC	3-Feb-21	21-Jan-21	2-Feb-21	Firm	9
TAMU	EPSY	8-Feb-21	16-Dec-20	2-Feb-21	Firm	35
TAMU	HLKN	5-Feb-21	1-Feb-21	5-Feb-21	Firm	4
TAMU	EAHR	5-Feb-21	19-Jan-21	5-Feb-21	Firm	13
TAMU	EPSY	5-Feb-21	19-Jan-21	5-Feb-21	Firm	13
TAMU	HLKN	16-Feb-21	10-Feb-21	15-Feb-21	Firm	4
TAMU	HLKN	16-Feb-21	9-Feb-21	16-Feb-21	Firm	6
TAMU	HLKN	12-Feb-21	4-Feb-21	16-Feb-21	Firm	9
TAMU	TLAC	25-Feb-21	2-Feb-21	25-Feb-21	Firm	18
TAMU	TLAC	25-Feb-21	2-Feb-21	25-Feb-21	Firm	18
TAMU	TLAC	25-Feb-21	12-Jan-21	25-Feb-21	Firm	33
TAMU	EPSY	26-Feb-21	25-Feb-21	26-Feb-21	Firm	1

February, 2021 Metrics from Maestro

Final Proposal Documents received less than 8 hours (i.e. technical narrative, references)

Last Submitted Date	Lead Organization
3-Feb-21	HLKN
5-Feb-21	HLKN
16-Feb-21	HLKN
25-Feb-21	TLAC
25-Feb-21	TLAC
25-Feb-21	TLAC