



Maestro Researcher Portal

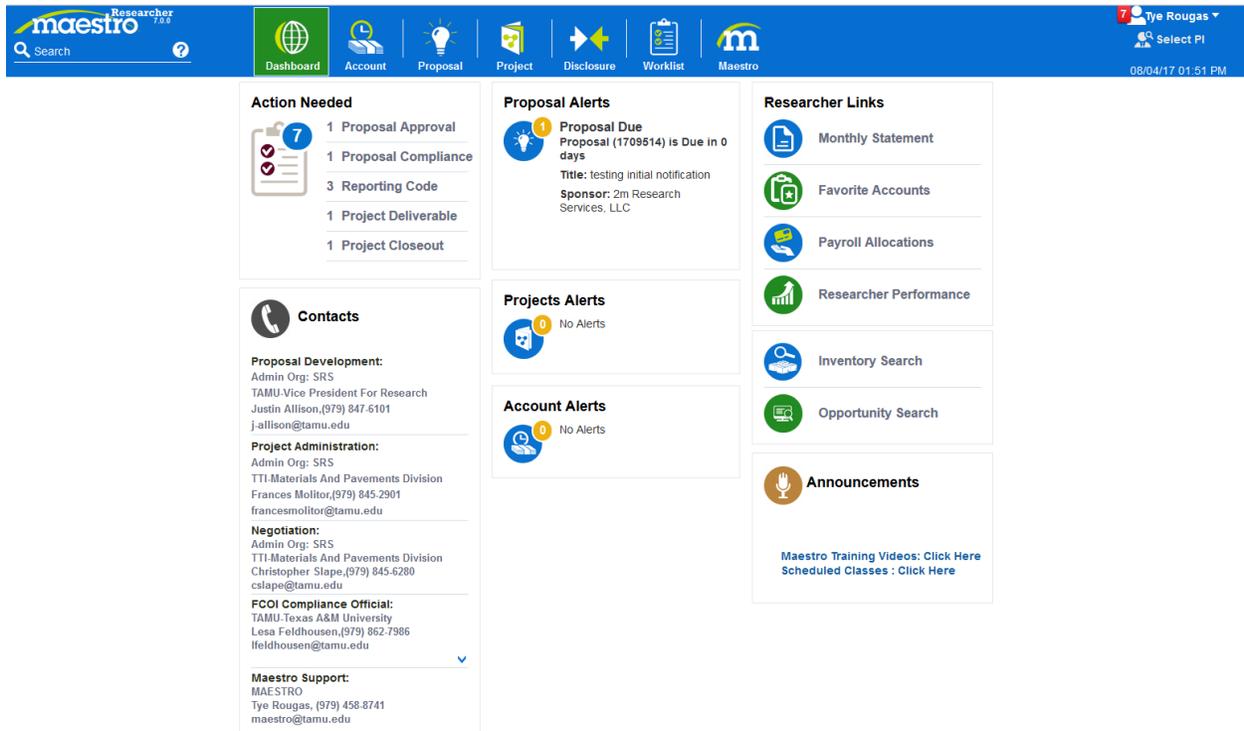
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## 2 INTRODUCTION

Welcome to the TAMUS Research Management Information System, Maestro.



Maestro is a web browser-based application that consists of several modules. The system is designed to support researchers and research administration across The Texas A&M University System (TAMUS). The information in Maestro is based upon data feeds from the FAMIS and Enterprise Data Warehouse databases.

Maestro provides researchers and research administrators with timely and accurate information needed to manage research activities and to assist in understanding what documents could need follow-up or additional actions from the researcher.

### 2.1 MAESTRO – USER ACCESS

Access the system by logging in to the Maestro homepage at <https://maestro.tamus.edu> with Single Sign-On (SSO) UIN and password.

- User accounts are automatically setup for researchers once they are added to a financial account in FAMIS, a proposal in Maestro, or a project in Maestro.
- Researcher Reviewers (business administrators, research administrators or other staff assisting researchers) must request an account.

### 3 RESEARCHER DASHBOARD

The Researcher Dashboard represents a doorway to information for research activities relevant to individual researchers. It serves as a central location where you can:

- View a comprehensive listing of items needing action or follow-up from the researcher
- View contact information for the Researcher’s Proposal Administrator, Project Administrator, and Conflict of Interest Official
- View alerts pertaining to proposals, projects, and accounts
- View research account balances and detailed transactions
- View proposals
- View active project information and project negotiation status
- Complete Financial Conflict of Interest disclosures
- View monthly account statements
- View payroll allocations
- Search for funding opportunities
- Search for inventory
- View performance data on proposals, awards, and expenditures

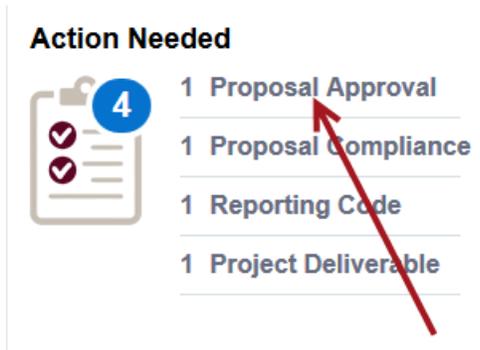
#### 3.1 VIEW A LISTING OF ITEMS THAT REQUIRE ACTION

The ‘Action Needed’ section of the researcher dashboard contains a list of all items that require action from the Researcher.

The screenshot shows the Maestro Researcher Portal interface. At the top is a navigation bar with icons for Dashboard, Account, Proposal, Project, Disclosure, Worklist, and Maestro. A search bar is on the left, and a user profile for 'Tye Rougas' is on the right. The main content area is divided into several sections:

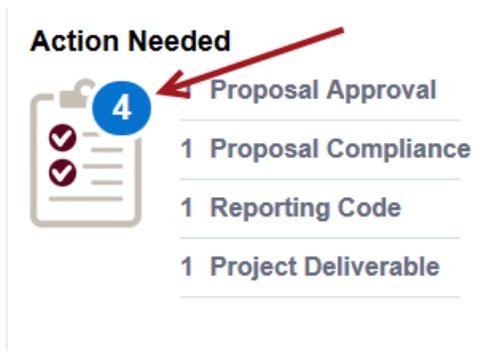
- Action Needed:** This section is highlighted with a red box and contains a list of 7 items: 1 Proposal Approval, 1 Proposal Compliance, 3 Reporting Code, 1 Project Deliverable, and 1 Project Closeout.
- Proposal Alerts:** Shows a 'Proposal Due' alert for proposal 1709514, which is due in 0 days. The title is 'testing initial notification' and the sponsor is '2m Research Services, LLC'.
- Projects Alerts:** Shows 'No Alerts'.
- Account Alerts:** Shows 'No Alerts'.
- Researcher Links:** Includes links for Monthly Statement, Favorite Accounts, Payroll Allocations, Researcher Performance, Inventory Search, and Opportunity Search.
- Announcements:** Includes links for 'Maestro Training Videos' and 'Scheduled Classes'.
- Contacts:** Lists contact information for Proposal Development, Project Administration, Negotiation, and FCOI Compliance Official.
- Maestro Support:** Provides contact information for MAESTRO support.

To navigate to a specific category of an item, such as Proposal Approval, click the hyperlinked name of the item displayed in the list.



This will navigate you to a worklist containing only items of that type selected or navigate you directly to the action/approval page if the item listed count is 1.

To navigate to a listing of all items needing action, click on the number displayed in the 'Action Needed' summary bubble.



This will navigate you a worklist containing all items needing attention. From this screen, you can navigate to a specific item by clicking on the description hyperlink.

Project Id	Type	Received Date	Due Date	Sponsor
M1600762	Project Deliverable	31-Mar-2016	30-Jun-2017	ICF International, Inc.
M1502210	Project Deliverable	31-May-2017	30-Jun-2017	Texas Department of Transportation
M1701828	Project Deliverable	05-Jul-2017		Department of Transportation-Federal Highway Administration
M1500555	Project Deliverable	21-Mar-2017	07-Jul-2017	Battelle Memorial Institute

### 3.2 FIND CONTACT INFORMATION FOR MY RESEARCH ACTIVITIES

Revision Date: 8/4/2017

The 'Contacts' section of the researcher dashboard contains contact information for the Researcher's Proposal Administrator, Project Administrator, Conflict of Interest Official, and Maestro Support.

The screenshot shows the Maestro Researcher Portal dashboard. At the top is a blue navigation bar with the Maestro logo, a search bar, and menu items: Dashboard, Account, Proposal, Project, Disclosure, Worklist, and Maestro. The user's name 'Tye Rougas' and a 'Select PI' button are on the right. The main content area is divided into several sections:

- Action Needed:** A list of tasks with a total count of 7: 1 Proposal Approval, 1 Proposal Compliance, 3 Reporting Code, 1 Project Deliverable, and 1 Project Closeout.
- Proposal Alerts:** A 'Proposal Due' alert for proposal 1709514, due in 0 days, with title 'testing initial notification' and sponsor '2m Research Services, LLC'.
- Projects Alerts:** 'No Alerts'.
- Account Alerts:** 'No Alerts'.
- Researcher Links:** A list of links including Monthly Statement, Favorite Accounts, Payroll Allocations, Researcher Performance, Inventory Search, and Opportunity Search.
- Announcements:** Links for 'Maestro Training Videos' and 'Scheduled Classes'.
- Contacts (highlighted with a red border):** A section titled 'Contacts' containing contact information for:
  - Proposal Development:** Admin Org: SRS, TAMU-Vice President For Research, Justin Allison, (979) 847-6101, j-allison@tamu.edu
  - Project Administration:** Admin Org: SRS, TTI-Materials And Pavements Division, Frances Molitor, (979) 845-2901, francesmolitor@tamu.edu
  - Negotiation:** Admin Org: SRS, TTI-Materials And Pavements Division, Christopher Slape, (979) 845-6280, cslape@tamu.edu
  - FCOI Compliance Official:** TAMU-Texas A&M University, Lesa Feldhousen, (979) 862-7986, lfeldhousen@tamu.edu
  - Maestro Support:** MAESTRO, Tye Rougas, (979) 458-8741, maestro@tamu.edu

### 3.3 VIEW ALERTS

Alerts pertaining to proposals, projects, and accounts are displayed in their respective alerts section of the researcher dashboard.

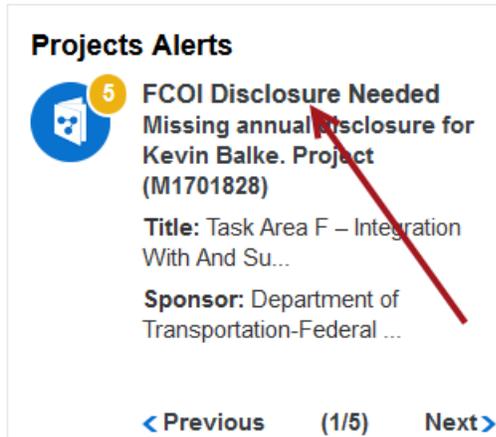
The screenshot shows the Maestro Researcher Portal dashboard. At the top is a blue navigation bar with the 'maestro' logo and version '7.0.0', a search bar, and icons for Dashboard, Account, Proposal, Project, Disclosure, Worklist, and Maestro. Below the navigation bar are several sections:

- Action Needed:** A card showing '4 Project Deliverable' with a checklist icon.
- Projects Alerts:** A card with a red border showing '6 FCOI Disclosure Needed' with a blue speech bubble icon. The text reads: 'Missing annual disclosure for Kevin Balke. Project (M1701828)', 'Title: Task Area F – Integration With And Su...', and 'Sponsor: Department of Transportation-Federal ...'. Navigation links for '< Previous (1/6) Next >' are at the bottom.
- Account Alerts:** A card showing '24 Account In Deficit' with a blue speech bubble icon. The text reads: 'Account (602571-00002) is -39.98 in deficit', 'Title: Task Order 7', and 'Sponsor: Battelle Memorial Institute'. Navigation links for '< Previous (1/24) Next >' are at the bottom.
- Contacts:** A list of contact information for Proposal Development, Project Administration, Negotiation, FCOI Compliance Official, and Maestro Support.
- Researcher Links:** A vertical list of links: Monthly Statement, Favorite Accounts, Payroll Allocations, Researcher Performance, Inventory Search, Opportunity Search, and Announcements.
- Announcements:** A section with a microphone icon and links for 'Maestro Training Videos: Click Here' and 'Scheduled Classes: Click Here'.

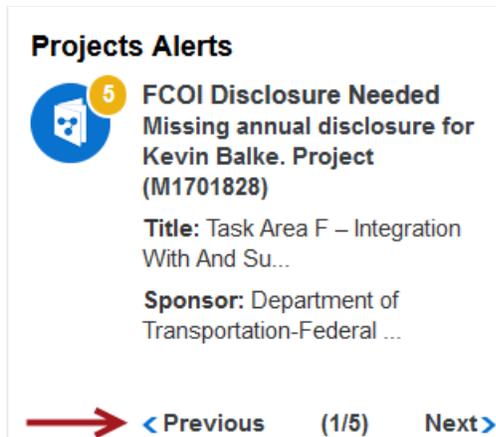
The summary bubble in each alert section display the total number of that type of alert.

This is a close-up of the 'Projects Alerts' card. The title is 'Projects Alerts'. Below it is a blue speech bubble icon containing a yellow circle with the number '5'. To the right of the icon, the text reads: 'FCOI Disclosure Needed', 'Missing annual disclosure for Kevin Balke. Project (M1701828)', 'Title: Task Area F – Integration With And Su...', and 'Sponsor: Department of Transportation-Federal ...'. At the bottom, there are navigation links: '< Previous (1/5) Next >'.

To navigate to a specific alert click the hyperlinked description of the alert.



To navigate between alerts in a given alert section, click the Next or Previous navigation arrow.



### 3.3.1 PROPOSAL ALERTS

Following are the types of alerts that will appear in the proposal alert section:

- Proposals with submission due within 14 days

### 3.3.2 PROJECT ALERTS

Following are the types of alerts that will appear in the project alert section:

- Research compliance protocol authorization expiring within 30 days
- Research compliance protocol authorization is missing
- Technical Deliverable past due, not completed by the responsible person
- Missing Financial Conflict of Interest annual disclosure for Investigator on the project
- Project has an open modification and the project end date in in the past
- Project budget period is ending in 90 days, has a balance of funds, and Carry Forward is currently not allowed

Revision Date: 8/4/2017

### 3.3.3 ACCOUNT ALERTS

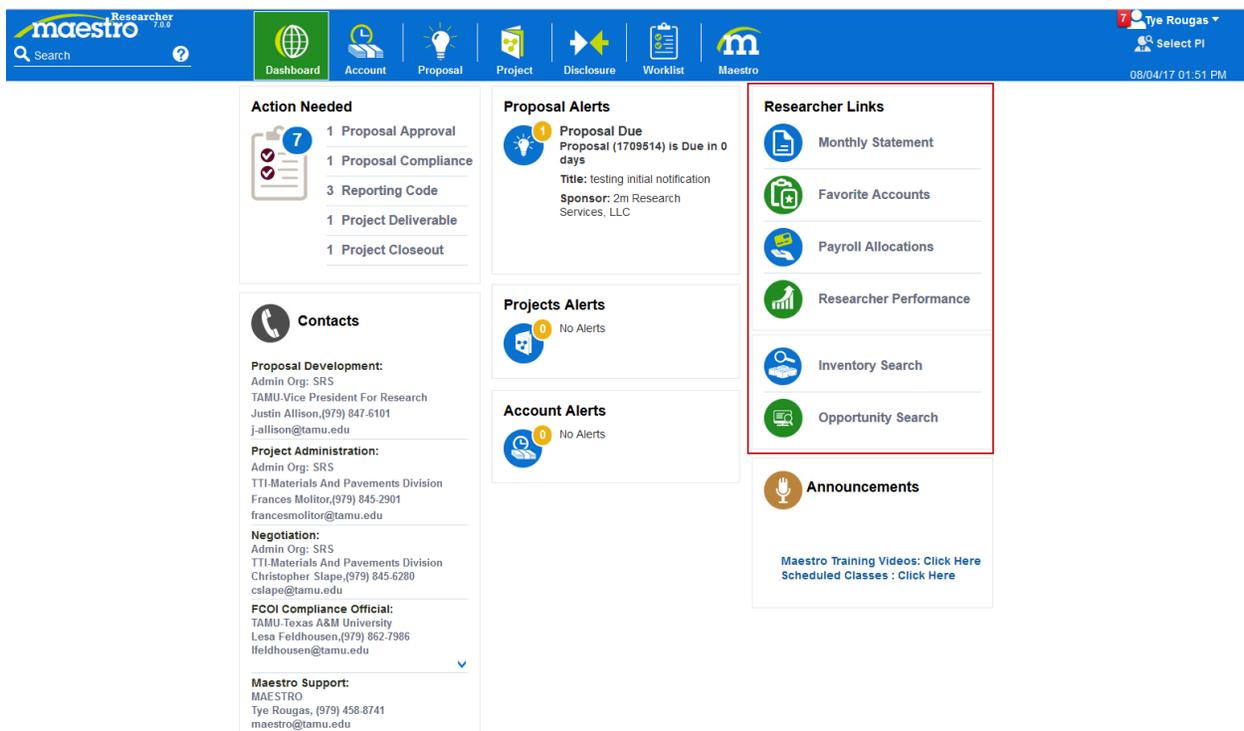
Following are the types of alerts that will appear in the account alert section:

❖ *Not applicable to non-sponsored accounts or accounts with institutional sponsors*

- Active accounts with a negative balance
- Active Accounts with a positive balance ending in 90 days
- Active Accounts frozen for activity

### 3.4 RESEARCHER LINKS

The Researcher Links section of the dashboard contains links to commonly used areas.



#### 3.4.1 MONTHLY STATEMENT

The monthly statement account list displays 12 months’ worth of historical account information for an account with expenses for that month.

- The display defaults to the last financial month prior to today’s date. To navigate to a different month click the corresponding tab at the top of the statement page.

Monthly Statement (Beverly Kuhn) Export Excel Show Selected Rows

JUL-2017 JUN-2017 MAY-2017 APR-2017 MAR-2017 FEB-2017 **JAN-2017** DEC-2016 NOV-2016 OCT-2016 SEP-2016 AUG-2016

Total Monthly Expenditure:

Account Number	Account Name	Sponsor	Expenditure	End Date	Member	Select Rows for Export/Review
No data to display						

From the month-year selected via the tab, you will see all accounts listed for which you are the Primary Responsible person on the account, with the monthly Expenditure for each account as well as a Total Monthly Expenditure for all accounts displayed.

Monthly Statement (Beverly Kuhn) Export Excel Show Selected Rows

JUL-2017 JUN-2017 MAY-2017 APR-2017 MAR-2017 FEB-2017 **JAN-2017** DEC-2016 NOV-2016 OCT-2016 SEP-2016 AUG-2016

Total Monthly Expenditure: 20,799.71

Account Number	Account Name	Sponsor	Expenditure	End Date	Member	Select Rows for Export/Review
▶ 190040-00008	Division Research Development	Institutional Sources	3,430.12		TTI	<input type="checkbox"/>
▶ 193009-00000	Miscellaneous Non-Reimbursable	Institutional Sources	176.13		TTI	<input type="checkbox"/>
▶ 603001-00001	Planning & Evaluating Active Traffic	National Academy of Science - National Cooperative Highway Res...	842.82	2/15/2017	TTI	<input type="checkbox"/>
▶ 603001-00003	S141222	National Academy of Science - National Cooperative Highway Res...	10,000.00	2/15/2017	TTI	<input type="checkbox"/>
▶ 607821-00001	Active Traffic Management (Atm) Implementation And Operations ...	Battelle Memorial Institute	5,098.04	12/24/2017	TTI	<input type="checkbox"/>
▶ 607951-00001	Regional Operations Forum/summits	Battelle Memorial Institute	1,252.60	1/21/2018	TTI	<input type="checkbox"/>

To export the results to Excel, click the 'Select Rows for Export/Review' checkbox next to each account you want to export and then click the 'Export Excel' button located at the top right of the screen.

Monthly Statement (Beverly Kuhn) Export Excel Show Selected Rows

JUL-2017 JUN-2017 MAY-2017 APR-2017 MAR-2017 FEB-2017 **JAN-2017** DEC-2016 NOV-2016 OCT-2016 SEP-2016 AUG-2016

Total Monthly Expenditure: 20,799.71

Account Number	Account Name	Sponsor	Expenditure	End Date	Member	Select Rows for Export/Review
▶ 190040-00008	Division Research Development	Institutional Sources	3,430.12		TTI	<input type="checkbox"/>
▶ 193009-00000	Miscellaneous Non-Reimbursable	Institutional Sources	176.13		TTI	<input checked="" type="checkbox"/>
▶ 603001-00001	Planning & Evaluating Active Traffic	National Academy of Science - National Cooperative Highway Res...	842.82	2/15/2017	TTI	<input type="checkbox"/>
▶ 603001-00003	S141222	National Academy of Science - National Cooperative Highway Res...	10,000.00	2/15/2017	TTI	<input type="checkbox"/>
▶ 607821-00001	Active Traffic Management (Atm) Implementation And Operations ...	Battelle Memorial Institute	5,098.04	12/24/2017	TTI	<input type="checkbox"/>
▶ 607951-00001	Regional Operations Forum/summits	Battelle Memorial Institute	1,252.60	1/21/2018	TTI	<input type="checkbox"/>

To see the details for a specific account, click the expansion arrow located to the left of the account number, or click the account number itself.

Monthly Statement (Beverly Kuhn) Export Excel Show Selected Rows

JUL-2017 JUN-2017 MAY-2017 APR-2017 MAR-2017 FEB-2017 **JAN-2017** DEC-2016 NOV-2016 OCT-2016 SEP-2016 AUG-2016

Total Monthly Expenditure: 20,799.71

Account Number	Account Name	Sponsor	Expenditure	End Date	Member	Select Rows for Export/Review
▶ 190040-00008	Division Research Development	Institutional Sources	3,430.12		TTI	<input checked="" type="checkbox"/>
▶ 193009-00000	Miscellaneous Non-Reimbursable	Institutional Sources	176.13		TTI	<input checked="" type="checkbox"/>
▶ 603001-00001	Planning & Evaluating Active Traffic	National Academy of Science - National Cooperative Highway Resea ...	842.82	2/15/2017	TTI	<input type="checkbox"/>
▶ 603001-00003	S141222	National Academy of Science - National Cooperative Highway Resea ...	10,000.00	2/15/2017	TTI	<input type="checkbox"/>
▶ 607821-00001	Active Traffic Management (Atm) Implementation And Operations Gui...	Battelle Memorial Institute	5,098.04	12/24/2017	TTI	<input type="checkbox"/>
▶ 607951-00001	Regional Operations Forum/summits	Battelle Memorial Institute	1,252.60	12/1/2018	TTI	<input type="checkbox"/>

Once expanded, you will see an Account header summary with Monthly Budget Transaction Total, Starting Balance, Total Expenditures, Encumbrances, and Ending Balance information followed by a listing of detailed Expense and Payroll transactions for the current month selected.

Account: 603001-00001  
 Name: Planning & Evaluating Active Traffic  
 Sponsor: National Academy of Science - National Cooperative Highway Research  
 Monthly Budget Transaction Total: 0.00  
 Start Balance: 15,546.70 Total Expenditures: 842.82 Encumbrances: 0.00 End Balance: 14,703.88

**Expenditures**

Description	Amount	Transaction Date	Doc Ref	Vendor	Category	Subcode
INDIRECT COST	234.32	2/1/2017	IC08929	Not Specified	Indirect Cost	Idc Fed Pass Thru-Non-Texas Entity
12/16 NETWORK SRVS	67.07	1/18/2017	2899685	Not Specified	Other Expenses	Th Network Support Services
12/16 COMPUTER USAGE FEE	26.45	1/18/2017	2899686	Not Specified	Other Expenses	Use Fee For Equipment Rep & Repl
<b>Total:</b>	<b>327.84</b>					

**Payroll Expenditures**

Description	Amount	Transaction Date	Pay End Date	% Effort	Pin	Category
	231.74	1/1/2017	1/1/2017	2%	C04581	Salaries & Benefits
	238.68	1/1/2017	12/28/2016	2%	C04581	Salaries & Benefits
	44.56	1/1/2017	1/1/2017	0%	C04581	Salaries & Benefits
<b>Total:</b>	<b>514.98</b>					

### 3.4.2 FAVORITE ACCOUNTS

Favorite accounts navigates to the current listing of your accounts that you have marked as ‘Favorites’ via the Current Account list screen.

Favorite Accounts (Beverly Kuhn)

Account	Member	Department	End Date	Project Title	Sponsor	PI Name	Primary PI Ind	Status	Indirect Balance	Direct Balance	Total Balance	Remove
468367-00001	TTI	DCV	31-Aug-2017	Task 9 - Project Management	Texas Department of Transportation	Kuhn, Beverly	No	Active	0.00	0.00	0.00	★
468367-00015	TTI	DCV	31-Aug-2017	Task 15 - Geometric/Traffic Ops Guidance	Texas Department of Transportation	Kuhn, Beverly	No	Active	0.00	0.00	0.00	★

- See instructions in [section 4.1](#) of this manual for details on how to add an account to your ‘Favorites’.

To navigate to account details, click the account number hyperlink.

Favorite Accounts (Beverly Kuhn)

Account	Member	Department	End Date	Project Title	Sponsor	PI Name
<a href="#">606731-00001</a>	TTI	DDV	30-Jun-2017	Integrated Region Travel Demand Mgmt Program	ICF International,	Kuhn, Beverly
<a href="#">607111-00001</a>	TTI	FSM		Proposed Practice Application Of Dynamic Control	National Academy of Sciences	National Cooperative Highway Research Program

To remove a previously selected account from your Favorite Accounts list, click the Remove icon located on the far right of the account listing row.

Dashboard Account Proposal Project Disclosure Worklist Maestro 08/27/17 10:26 AM Account List

Favorite Accounts(Beverly Kuhn) Green Shaded projects END within three months. Filter Mode Export

Account	Member	Department	End Date	Project Title	Sponsor	PI Name	Primary PI Ind	Status	Indirect Balance	Direct Balance	Total Balance	Action
606731-00001	TTI	DDV	30-Jun-2017	Integrated Regional And Statewide Travel Demand Management (Tdm) Program	ICF International, Inc.	Kuhn, Beverly	Yes	Active	0.00	0.00	0.00	Remove
607111-00001	TTI	FSM	30-Jun-2018	Proposed Practices For The Application Of Dynamic Lane Use Control	National Academy of Science - National Cooperative Highway Research	Kuhn, Beverly	No	Active	0.00	0.00	0.00	Remove

### 3.4.3 PAYROLL ALLOCATIONS

Payroll Allocations Date Updated 2/8/2017

Search: System Member All Account PIN All

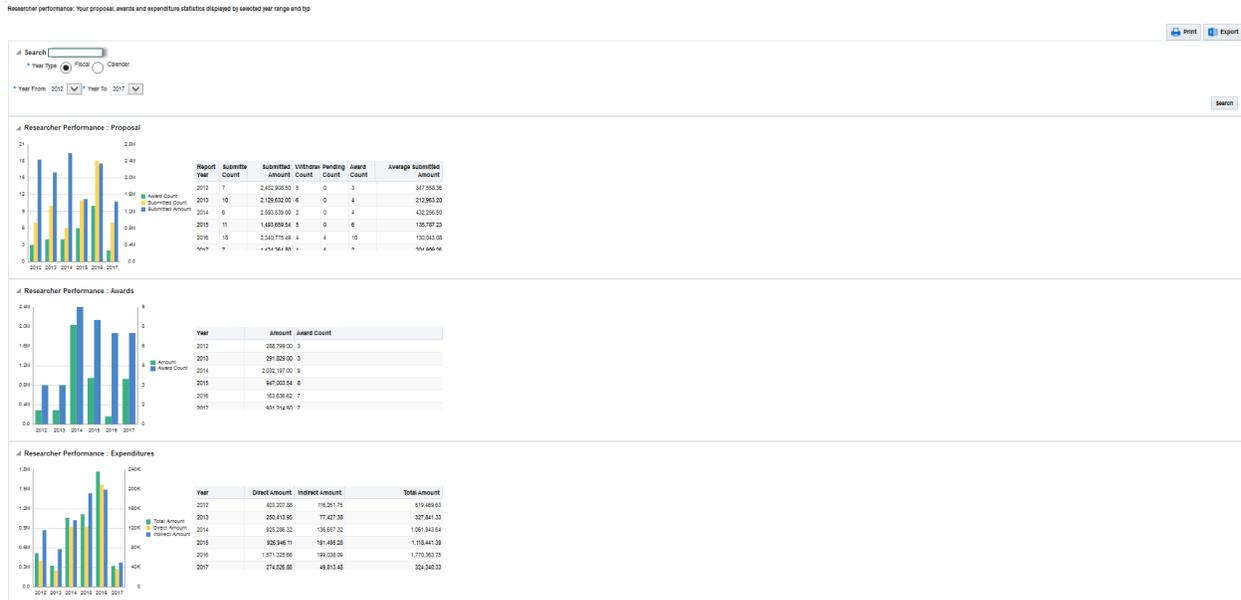
Action View Detach

First Name	Last Name	System Member	Account	Account Title	PIN	Effort (%)	Working Months Remaining	Monthly Pay	Pay Remaining	Longevity Remaining	Benefits Remaining	Effective From Date	Effective Thru Date
		TEES	400216-00015	Pserc Consortium - Power Systems Engineering Research Center		50%	4	1800	7200	0	1299.64	9/1/2016	5/31/2017
		TEES	506840-00001	Bd Spokes: Spoke: South: Collaborative: Smart Grids Big Data		100%	7	5425.58	37979.06	700	7675.49	11/1/2016	8/31/2017
		TAMU	290102-10000	Vpr Smart Grid - Kezunovic		100%	0	5425.58	0	0	0	9/1/2016	10/31/2016
		TEES	506830-00006	Timing Intrusion Management Ensuring Resiliency		51%	6	2036.96	12221.76	61.75	3908.7	1/1/2017	7/31/2017

The purpose of this screen is to provide the account owners with information about projected payroll yet to be paid. The data for this screen comes from BPP Active Budget. The active budget is scanned for currently active and future iterations for a single fiscal year. A line is written to the extract file for each Source line on the iteration that is active now or in the future.

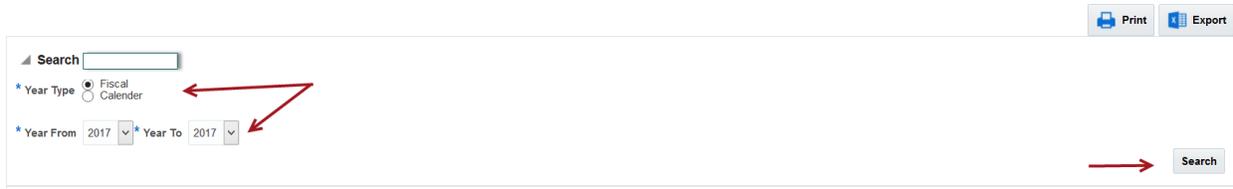
Calculations are done in the extract file to estimate the amount of projected payroll “yet to be paid” for the fiscal year. There are also calculations to estimate the benefits remaining to be paid as well. These calculations also calculate the pay periods remaining in the fiscal year.

### 3.4.4 RESEARCHER PERFORMANCE

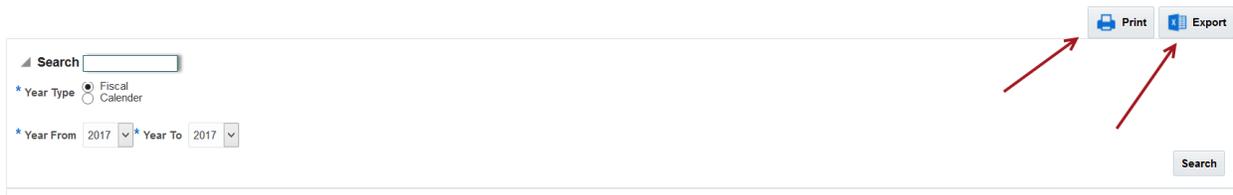


The Researcher Performance screen displays Proposal, Award, and Expenditure information for the Researcher. The default period displayed is the five last Fiscal Years..

To change year type or select a range of years to view, click the appropriate radio button and select the year range from the dropdowns and then click the Search button to refresh the screen accordingly.



Results may be printed or Exported to Excel via the pushbuttons located on the top right of the screen.



### 3.4.5 INVENTORY SEARCH

**Inventory Search**

Hint: The Search will return only the top 200 records. Please enter your search criteria accordingly.

Description	Manufacturer	Model	Serial Num	Asset ID	Organization	Custodian	City	State	Acquisition Date
Microscope Olympus Bx43f With Camera Adapter	Olympus	BX43F	5E43726	0000134193	AL-RSRCH-Vet - Pathobiology	Karkoska, Tina tkarkoska@cvm.tamu.edu	College Station	TX	19-Aug-2015
Microscope Lens, Nikon Lambda_60x	Nikon	CFI PLAN APO LAMB...		1500538679	TAMHSC Molecular And Cellular Medicine	Eubanks, Lisa leubanks@medicine.tamhsc.edu	College Station	TX	14-Aug-2015
KNIFE-EDGE SCANNING MICROSCOPE FABRICATION	3SCAN	CUSTOM	TBD	2018703	---	---			12-Aug-2015
Microscope Inverted AxiO Vert A1	Zeiss	AXIO VERT A1	3847001485	0000134448	AL-RSRCH Nutrition And Food Science	Mata, Lisa lmata@tamu.edu	College Station	TX	28-Jul-2015
Microscope, Leica S9 E			104482945928241	1500039723	TAMU Department Of Biology & Chemistry	Mott, Daniel dmott@tamu.edu	Laredo	TX	27-Jul-2015

Inventory Search gives Maestro users view into all research equipment that is kept in FAMIS assets modules. They can find out where the equipment resides, when it was purchased and who is custodian.

**3.4.6 OPPORTUNITY SEARCH**

Opportunity search navigates to the Funding Opportunity Search page.

**Funding Opportunity Search**

Title	Sponsor	RFP#	Reviewed by OSRS	Ltd. Sub.	Ltd. Sub. Date	Pre-proposal Date	Deadline Date
Feed the Future Asia Innovative Farmers Activity	United States Agency for International Development	USAID-RDMA-486-15-000011-...	No	No			
Vet-LIRN Cooperative Agreement Program to Develop and Validate Testing Methods for Food Irradiation Specific Markers in Animal Feeds and Treats (U19)	Department of Health and Human Services	PAR-16-132	No	No			

Maestro has a nightly process in place to load Grants.gov funding opportunities. These opportunities can then be searched by various search fields such as RFP#, Title, Sponsor, etc. or a combination of one or more of these search fields.

To view additional detailed information provided by the funding agency, click on the hyperlinked RFP# returned in the results window.

Action View Format Detach Wrap

Title	Sponsor	RFP#	Reviewed by OSRS	Ltd. Sub.	Ltd. Sub. Date	Pre-proposal Date	Deadline Date
Feed the Future Asia Innovative Farmers Activity	United States Agency for International Development	USAID-RDMA-486-15-000011-...	No	No			
Vet-LIRN Cooperative Agreement Program to Develop and Validate Testing Methods for Food Irradiation Specific Markers in Animal Feeds and Treats (U18)	Department of Health and Human Services	PAR-16-132	No	No			

### 3.4.7 ANNOUNCEMENTS

The ‘Announcement’ section of the researcher dashboard contains Maestro news and updates as well as hyperlinks to instructional videos/guides and schedules of Maestro training classes.

## 4 VIEWING ACCOUNT BALANCES AND TRANSACTIONS

### 4.1 CURRENT ACCOUNT LIST

The Account icon navigates to Current Account list screen.

**Current Account List(Kuhn, Beverly)**

Search: Account Number, Account Title, Sponsor and Lead Org

Account	Project Title	Lead Organization	Sponsor	Administrator	Direct Balance	Indirect Balance	Total Balance	Action
190040-00008	Division Research Development	TTI-System Reliability	Institutional Sources	Administrator	0.00	0.00	0.00	Add Favorite
193009-00000	Miscellaneous Non-Reimbursable	TTI-System Reliability	Institutional Sources	Administrator	0.00	0.00	0.00	Add Favorite
194039-00000	Research Funding Diversity	TTI-System Reliability	Institutional Sources	Administrator	0.00	0.00	0.00	Add Favorite
220315-00000	Fixed Fee Residual Balance - Deroche	TTI-System Reliability	Institutional Sources	Administrator	0.00	0.00	0.00	Add Favorite
468367-00001	Task 9 - Project Management	TTI-Connected And Automated Transportation	Texas Department of Transportation	Administrator	0.00	0.00	0.00	Add Favorite
468367-00002	Tamu Cast - Task 11 Systems Engineering Support	TTI-Connected And Automated Transportation	Texas Department of Transportation	Administrator	0.00	0.00	0.00	Add Favorite

This screen shows researchers all of their accounts and balances, regardless of who is the administering organization. The screen lists all active support accounts where the Researcher is the primary Principal Investigator (PI) as well as all active support accounts where the Researcher is a Co-Investigator (Co-Pi).

To add an account as a ‘favorite account’, click the ‘Add Favorite’ icon on the account you wish to add. To view a list of your selected Favorite Accounts, click the ‘Favorite Accounts’ icon.

**Current Account List(Kuhn, Beverly)**

Favorite Accounts  
Green Shaded projects END within three months.

Filter: Mode Export

Account	Project Title	Lead Organization	Sponsor	Administrator	Direct Balance	Indirect Balance	Total Balance	Add Favorite
190040-00008	Division Research Development	TTI-System Reliability	Institutional Sources	Administrator	0.00	0.00	0.00	★
193009-00000	Miscellaneous Non-Reimbursable	TTI-System Reliability	Institutional Sources	Administrator	0.00	0.00	0.00	★
194039-00000	Research Funding Diversity	TTI-System Reliability	Institutional Sources	Administrator	0.00	0.00	0.00	★
220315-00000	Fixed Fee Residual Balance - Deroche	TTI-System Reliability	Institutional Sources	Administrator	0.00	0.00	0.00	★
468367-00001	Task 9 - Project Management	TTI-Connected And Automated Transportation	Texas Department of Transportation	Administrator	0.00	0.00	0.00	★
468367-00002	Tamu Cast - Task 11 Systems Engineering Support	TTI-Connected And Automated Transportation	Texas Department of Transportation	Administrator	0.00	0.00	0.00	★

To navigate to account details, click the account number hyperlink.

<p><b>Account:</b> <a href="#">606731-00001</a></p> <p><b>Primary PI:</b> Kuhn, Beverly</p> <p><b>End Date:</b> 30-Jun-2017</p>	<p><b>Project Title:</b> Integrated Regional And Statewide Traveldemand Management (Tdm) Program</p> <p><b>Lead Organization:</b> TTI-System Reliability</p> <p><b>Sponsor:</b> ICF International, Inc.</p>
<p><b>Account:</b> <a href="#">607111-00001</a></p> <p><b>Primary PI:</b> Kuhn, Beverly</p> <p><b>End Date:</b> 30-Jun-2018</p>	<p><b>Project Title:</b> Proposed Practices For The Application Of Dynamic Lane Use Control</p> <p><b>Lead Organization:</b> TTI-Signs And Markings Program</p> <p><b>Sponsor:</b> National Academy of Science - National Cooperative Highway Research</p>
<p><b>Account:</b> <a href="#">607111-00002</a></p> <p><b>Primary PI:</b> Kuhn, Beverly</p> <p><b>End Date:</b> 30-Jun-2018</p>	<p><b>Project Title:</b> Proposed Practices For The Application Of Dynamic Lane Use Control</p> <p><b>Lead Organization:</b> TTI-Signs And Markings Program</p> <p><b>Sponsor:</b> National Academy of Science - National Cooperative Highway Research</p>
<p><b>Account:</b> <a href="#">607111-00003</a></p> <p><b>Primary PI:</b> Kuhn, Beverly</p> <p><b>End Date:</b> 30-Jun-2018</p>	<p><b>Project Title:</b> Proposed Practices For The Application Of Dynamic Lane Use Control</p> <p><b>Lead Organization:</b> TTI-Signs And Markings Program</p> <p><b>Sponsor:</b> National Academy of Science - National Cooperative Highway Research</p>

### 4.1.1 ACCOUNT INFORMATION

Account (607111-00001) Account List

Title: Proposed Practices For The Application Of Dynamic Lane Use Control  
 Sponsor: National Academy of Science - National Cooperative Highway Research  
 Status: Active

Primary PI: Chrysler, Susan  
 Member: TTI  
 Funding Period: 01-Jul-2016 to 30-Jun-2018

Administrator: Molitor, Frances  
 Phone: (979) 845-2901  
 Email: francesmolitor@tamu.edu

[Relationship](#)
[Account Information](#)
[Account Balance](#)
[Account Transaction](#)
[Burn Rate](#)

**Account Information**

Setup Date: 29-Jun-2016  
 Funding Type: Private  
 F & A Cost Method: 48.5% MTDC15  
 Year End Process: P  
 Effort: DRES -  
 Status: Active  
 Project: M1602419 - Proposed Practices for the Application of Dynamic Lane Use Control  
 Current Funds: Yes

Gift Fee Exempt: No  
 Bottom Line Budget Control: Yes  
 FAMIS ABR Rule: 001  
 Budget Sort: -  
 NACUBO Function: 15 - Research  
 Member: TTI  
 Exclude from Bottom Line: 0.00

**Personnel**

Primary PI: Susan Chrysler  
 CO-PI: Kevin Baile  
 CO-PI: Melisa Finley  
 CO-PI: Shawn Turner  
 CO-PI: Alicia Nelson  
 CO-PI: Beverly Kuhn  
 CO-PI: Sushant Sharma  
 CO-PI: Ivan Lorenz

CO-PI: Kathryn Fitzpatrick  
 CO-PI: Luann Theiss

This screen displays all the attributes of the selected account. Data is fed from data warehouse and it represents one day old information.

### 4.1.2 ACCOUNT BALANCE

Account (607111-00001) Account List

Title: Proposed Practices For The Application Of Dynamic Lane Use Control  
 Sponsor: National Academy of Science - National Cooperative Highway Research  
 Status: Active

Primary PI: Chrysler, Susan  
 Member: TTI  
 Funding Period: 01-Jul-2016 to 30-Jun-2018

Administrator: Molitor, Frances  
 Phone: (979) 845-2901  
 Email: francesmolitor@tamu.edu

[Relationship](#)
[Account Information](#)
[Account Balance](#)
[Account Transaction](#)
[Burn Rate](#)

**Account Balance**

Search Period: Start August 2017 End August 2017

Finance Category	Project Budget as of (Aug/2017)	Project Expenditure as of (Aug/2017)	Period Expenditure (Aug/2017 to Aug/2017)	Encumbrance as of (Aug/2017)	Balance as of (Aug/2017)	% Spent	% Encumbered
Salaries Pool	77,079.00	67,722.05	0.00	0.00	9,356.95	87.861	0
Wages Pool	0.00	625.60	0.00	0.00	-625.60	0	0
Benefits Pool	17,905.00	15,105.95	0.00	0.00	2,799.05	84.367	0
Travel Pool	3,918.00	0.00	0.00	0.00	3,918.00	0	0
Supplies Pool	0.00	0.00	0.00	0.00	0.00	0	0
Other Operating Pool	2,823.00	1,302.44	0.00	0.00	1,520.56	46.137	0
Capital Outlay Pool	0.00	0.00	0.00	0.00	0.00	0	0
Reserve For Indirect Cost Recovery	0.00	0.00	0.00	0.00	0.00	0	0
Rsrv-Research/Sponsored Project	2,263.00	0.00	0.00	0.00	2,263.00	0	0
Indirect Cost Pool	48,587.00	40,388.31	0.00	0.00	8,198.69	83.126	0
<b>Direct Only Total</b>	<b>103,988.00</b>	<b>84,756.04</b>	<b>0.00</b>	<b>0.00</b>	<b>19,231.96</b>	<b>81.51</b>	<b>0.00</b>
<b>Indirect Only Total</b>	<b>48,587.00</b>	<b>40,388.31</b>	<b>0.00</b>	<b>0.00</b>	<b>8,198.69</b>	<b>83.13</b>	<b>0.00</b>
<b>Account Total</b>	<b>152,575.00</b>	<b>125,144.35</b>	<b>0.00</b>	<b>0.00</b>	<b>27,430.65</b>	<b>82.02</b>	<b>0.00</b>

The account balance screen displays account balances by category and account revenue balance. Balances displayed are real time from FAMIS.

Columns 'Project Budget as of' and 'Project Expenditure as of' display budget and expenditures for project inception to specified End date for research projects. Year based projects have only current year values. Column 'Encumbrance as of' displays value for encumbrance as of End date. Column 'Period Expenditure' can display cumulative expenditure for the selected period (Start Date – End Date). These dates can be changed by selecting the respective drop downs and then clicking the 'Search' pushbutton to refresh the screen.

Relationship
Account Information
Account Balance
Account Transaction
Burn Rate

Account Balance

Search Period: \* Start August 2017 \* End August 2017 Search

Action View Format Wrap

Finance Category	Project Budget as of (Aug/2017)	Project Expenditure as of (Aug/2017)	Period Expenditure (Aug/2017 to Aug/2017)	Encumbrance as of (Aug/2017)	Balance as of (Aug/2017)	% Spent	% Encumbered
Salaries Pool	77,079.00	67,722.05	0.00	0.00	9,356.95	87.861	0
Wages Pool	0.00	625.60	0.00	0.00	-625.60	0	0
Benefits Pool	17,905.00	15,105.95	0.00	0.00	2,799.05	84.367	0
Travel Pool	3,918.00	0.00	0.00	0.00	3,918.00	0	0
Supplies Pool	0.00	0.00	0.00	0.00	0.00	0	0
Other Operating Pool	2,823.00	1,302.44	0.00	0.00	1,520.56	46.137	0
Capital Outlay Pool	0.00	0.00	0.00	0.00	0.00	0	0
Reserve For Indirect Cost Recovery	0.00	0.00	0.00	0.00	0.00	0	0

### 4.1.3 ACCOUNT BALANCE DETAIL

To view account balance detail, click on the hyperlinked expenditure or encumbrance amount for a particular Finance Category.

Account (004751-0001)

Title: Integrate Regional And Statewide Travel Demand Management (TDM) Program  
 Member: TTI  
 Status: Active

Primary PI: Kuhn, Beverly  
 Funding Period: 14-Oct-2015 to 30-Jun-2017  
 Sponsor: ICF International, Inc

Relationship Account Information Account Balance Account Transactions Burn Rate

Search Accounts: \* Start June 2016 \* End June 2017 Search

Action View Format Wrap

Finance Category	Project Budget as of (Jun2017)	Project Expenditure as of (Jun2017)	Period Expenditure (Jun2015 to Jun2017)	Encumbrance as of (Jun2017)	Balance as of (Jun2017)	% Spent	% Encumbered
Salaries Pool	11,253.59	1,326.27	1,326.27	0.00	9,927.32	11.786	0
Wages Pool	0.00	0.00	0.00	0.00	0.00	0	0
Benefits Pool	2,504.42	266.62	266.62	0.00	2,237.80	10.642	0
Travel Pool	4,870.00	1,092.54	1,092.54	0.00	3,777.46	22.434	0
Supplies Pool	0.00	0.00	0.00	0.00	0.00	0	0
Other Operating Pool	173.21	20.91	20.91	0.00	152.30	12.072	0
Capital Outlay Pool	0.00	0.00	0.00	0.00	0.00	0	0
Reserve For Indirect Cost Recovery	0.00	0.00	0.00	0.00	0.00	0	0
Non-Research/Sponsored Project	0.00	0.00	0.00	0.00	0.00	0	0
Indirect Cost Pool	6,677.94	772.50	772.50	0.00	5,905.44	11.565	0
Direct Only Total	18,861.22	2,706.24	2,706.24	0.00	16,054.98	14.30	0.00
Account Total	25,479.16	3,478.74	3,478.74	0.00	22,000.42	13.65	0.00

Account Revenue Balance

Category	Project Budget (Jun2017)	Project Earnings (Jun2017)	Period Earnings (Jun2015 to Jun2017)	To be Earned	% Earned
No records available.					

Account Balance Detail Category Code: Travel Pool

Subcode	Subcode Title	Finance Category	Expenditure
3000	Travel Pool	Travel Pool	0.00
3111	Tra-Qua-Public Trans - Other	Travel Pool	310.40
3125	Tra-Qua-Incidental Expenses	Travel Pool	86.64
3130	Tra-Qua-Meals & Lodging	Travel Pool	695.00
			1,092.04

clicking hyperlinked expenditure or encumbrance will display balance detail

### 4.1.4 ACCOUNT TRANSACTIONS

To view detailed transactions, click the hyperlinked Subcode displayed in the account balance detail or click the 'Account Transactions' icon located at the top of the page.

Capital Outlay Pool	0.00	0.00	0.00	0.00
Reserve For Indirect Cost Recovery	0.00	0.00	0.00	0.00
Rsrv-Research/Sponsored Project	0.00	0.00	0.00	0.00
Indirect Cost Pool	6,677.94	772.50	772.50	0.00
Direct Only Total	18,801.22	2,706.24	2,706.24	0.00
Account Total	25,479.16	3,478.74	3,478.74	0.00

Columns Hidden 1

Account Revenue Balance

Category	Project Budget (Jun/2017)	Project Earnings (Jun/2017)	Period Earnings (Jun/2015 to Jun/2017)
No records available.			

Account Balance Detail Category Code: Travel Pool X

Action View Format Detach Wrap

Subcode	Subcode Title	Finance Category	Expenditure
3000	Travel Pool	Travel Pool	0.00
3111	Tvl-Out-Public Trans. - Other	Travel Pool	310.40
3125	Tvl-Out-Incidental Expenses	Travel Pool	86.64
3130	Tvl-Out-Meals & Lodging	Travel Pool	695.50
			<b>1,092.54</b>

Account (606731-00001)

Account List

Title: Integrated Regional And Statewide Traveldemand Management (Tdm) Pr  
 Member: TTI  
 Status: Active  
 Primary PI: Kuhn, Beverly  
 Funding Period: 14-Oct-2015 to 30-Jun-2017  
 Sponsor: ICF International, Inc.  
 Administrator: Johnson, Natlie  
 Phone: 9798459852  
 Email: ndjohnson@tamu.edu

- Relationship
- Account Information
- Account Balance
- Account Transactions
- Burn Rate

Account Transaction

Search Accounts: \* Start June 2015 \* End June 2017 Search

Expenditure Encumbrance Budget Revenue Budget Revenue Actuals Payroll Transactions Payroll Commitment Account Receivables

Action View Format Detach Wrap

Transaction Date	Transaction Description	Amount	PO Reference	Document Number	Document Description	Subcode Title
06-Apr-2016	BEVERLY*KUHN	695.50		3601666	Beverly Kuhn	Tvl-Out-Meals & Lodging
06-Apr-2016	BEVERLY*KUHN	86.64		3601666	Beverly Kuhn	Tvl-Out-Incidental Expenses
06-Apr-2016	BEVERLY*KUHN	310.40		3601666	Beverly Kuhn	Tvl-Out-Public Trans. - Other
		<b>1,092.54</b>				

Columns Hidden 1

Screen is designed to display expenditure, encumbrance, budget, revenue budget, revenue actuals, payroll, payroll commitment, and account receivables transactions. To display transaction details click on the respective tab for the type of transaction you wish to view. Encumbrances for only non-payroll items are displayed, except for TAMRF.

For expense document(s), click on:

- PO Reference number link opens the purchasing document report for FAMIS accounts
- Document number link opens the voucher data form for FAMIS accounts
- For TEES accounts with activity before September 1, 2015, the PO Reference number link displays purchase requisition or travel requisition based on the expense and image related to the transaction.
- For TEES accounts with activity before September 1, 2015, the Document Number link displays purchase voucher or travel voucher based on the expense and image related to the transaction.

For encumbrance document:

- Document number link displays purchase document report for FAMIS accounts
- Document number link displays purchase requisition for TEES accounts with activity before September 1, 2015 and image related to the transaction

#### 4.1.4.1 PAYROLL TRANSACTIONS

Account (606731-00001) Account List

Title: Integrated Regional And Statewide Traveldemand Management (Tdm) Pr  
 Member: TTI  
 Status: Active

Primary PI: Kuhn, Beverly  
 Funding Period: 14-Oct-2015 to 30-Jun-2017  
 Sponsor: ICF International, Inc.

Administrator: Johnson, Natlie  
 Phone: 9798459852  
 Email: ndjohnson@tamu.edu

Relationship | Account Information | Account Balance | Account Transactions | Burn Rate

Payroll Transaction

Search Accounts: \* Start June 2015 \* End June 2017 Search

Expenditure | Encumbrance | Budget | Revenue Budget | Revenue Actuals | **Payroll Transactions** | Payroll Commitment | Account Receivables

Action View Format Detach Wrap

Name	PIN	% Effort	Sub Code	Pay Voucher	Amount	Transaction Date	Pay Period End	Pay Check Date
	100	1920	Fica Contributions (Oasi Matching)	0005010	79.37	31-May-2016	30-Apr-2016	02-May-2016
	100	1945	Worker's Compensation Assessments	0005010	1.33	31-May-2016	30-Apr-2016	02-May-2016
	100	1310	Sal-Research - Faculty Equivalent	0005010	1,304.17	31-May-2016	30-Apr-2016	02-May-2016
	100	1960	Trs Matching Contribution	0005010	90.19	31-May-2016	30-Apr-2016	02-May-2016
	100	1910	Employee Insurance Payments	0005010	62.34	31-May-2016	30-Apr-2016	02-May-2016
	100	1920	Fica Contributions (Oasi Matching)	0005010	18.56	31-May-2016	30-Apr-2016	02-May-2016
	100	1610	Longevity Pay	0005010	22.10	31-May-2016	30-Apr-2016	02-May-2016
	100	1952	Lump Sum Assessment- Faculty	0005010	13.04	31-May-2016	30-Apr-2016	02-May-2016
	100	1950	Unemployment Compensation Insurance	0005010	1.33	31-May-2016	30-Apr-2016	02-May-2016
	100	1910	Employee Insurance Payments	0005010	0.36	31-May-2016	30-Apr-2016	02-May-2016
<b>Total</b>					<b>1,592.79</b>			

This screen displays detail payroll transactions at individual position pin level.

### 4.1.4.2 PAYROLL COMMITMENTS

Account (606731-00001) Account List

Title: Integrated Regional And Statewide Travel Demand Management (Tdm) Pr  
 Member: TTI  
 Status: Active

Primary PI: Kuhn, Beverly  
 Funding Period: 14-Oct-2015 to 30-Jun-2017  
 Sponsor: ICF International, Inc.

Administrator: Johnson, Natilie  
 Phone: 9798459852  
 Email: ndjohnson@tamu.edu

Relationship | Account Information | Account Balance | Account Transactions | Burn Rate

Payroll Commitment - (Real Time Balances)

Search Accounts: \* Start June 2017 \* End June 2017 Search

Expenditure | Encumbrance | Budget | Revenue Budget | Revenue Actuals | Payroll Transactions | **Payroll Commitment** | Account Receivables

Action | View | Format | Detach | Wrap

Position	Name	Budget / Wage	Salary Amount	Longevity Amount	Benefit Amount
No Data to display.			0.00	0.00	0.00

The purpose of this screen is to show payroll encumbrance details. Commitments are shown only by invoking web services for FAMIS accounts (TAMRF, TTI excluded).

### 4.1.5 BURN RATE

Account (606731-00001) Account List

Title: Integrated Regional And Statewide Travel Demand Management (Tdm) Program  
 Member: TTI  
 Status: Active

Primary PI: Kuhn, Beverly  
 Funding Period: 14-Oct-2015 to 30-Jun-2017  
 Sponsor: ICF International, Inc.

Administrator: Johnson, Natilie  
 Phone: 9798459852  
 Email: ndjohnson@tamu.edu

Relationship | Account Information | Account Balance | Account Transactions | **Burn Rate**

Account spending analysis

Search Accounts: \* Start October 2015 \* End June 2017 \* Planned months to distribute budget over: 21 Search

**Planned Expenditures Versus Actual Expenditure**

Account Budget: Budget received over time.  
 Expenditures: Show total expenditures over time.  
 Planned Expenditure: Distribution of total budget over a number of months reflected as progressive total predicted expenditure over time.

**Spending Trends**

(%) Spent: Percentage of spending until current month.  
 Projected (% Spent): Future percentage of spending expectation based on current spending trend.

**Spending Trend Over Time**

Expenditures | Budget | Cash Burn Rate

This screen displays expenditure and spending trends for the account in three different areas:

- Planned Expenditures Versus Actual Expenditures
  - Account Budget: Budget received over time.
  - Expenditures: Show total expenditures over time.
  - Planned Expenditure: Distribution of total budget over a number of months reflected as progressive total predicted expenditure over time.
- Spending Trends
  - (%) Spent: Percentage of spending until current month.

- Projected (%)Spent: Future percentage of spending expectation based on current spending trend.
- Spending Trend Over Time
  - Cash Burn Rate: The difference between first month in funding period until period month, divided over number of months until that point.
    - Cash burn rate should show how fast or slow you are buring from your budget over time.

### 4.1.6 RELATIONSHIP

**Account (606731-00001)** Account List

**Title:** Integrated Regional And Statewide Traveldemand Management (Tdm) Pr  
**Member:** TTI  
**Status:** Active

**Primary PI:** Kuhn, Beverly  
**Funding Period:** 14-Oct-2015 to 30-Jun-2017  
**Sponsor:** ICF International, Inc.

**Administrator:** Johnson, Natlie  
**Phone:** 9798459852  
**Email:** ndjohnson@tamu.edu

[Relationship](#) | 
 [Account Information](#) | 
 [Account Balance](#) | 
 [Account Transactions](#) | 
 [Burn Rate](#)

**Research Project Relationship for Account (606731-00001)**

Projects	
M1600762	Integrated Regional and Statewide Travel Demand Management (TDM) Program Delivering Support of an Active Transportation and Demand Management (ATDM) - BA 12-1132
Proposals	
1501696	Integrated Regional and Statewide Travel Demand Management (TDM) Program Delivering Support of an Active Transportation and Demand Management (ATDM)
Billing Projects	
6067310000	Integrated Regional and Statewide Travel Demand Management (TDM) Program Delivering Support of an Active Transportation and Demand Management (ATDM) - BA 12-1132
Accounts	
606731-00000	Integrated Regional and Statewide T(Primary Org.; System Reliability, Responsible: Kuhn, Beverly)
606731-00001	Integrated Regional and Statewide T(Primary Org.; System Reliability, Responsible: Kuhn, Beverly)

This screen displays the relationship between connected entities. (proposals, projects, and accounts). You can easily and quickly navigate among the various connected entities by clicking the corresponding hyperlinked project number, proposal number, billing project number, or account number.

## 5 VIEWING PROPOSALS

### 5.1 CURRENT PROPOSAL LIST

The Proposal icon navigates to Current Proposal List screen.

**Current Proposal List (Beverly Kuhn)**

Proposal ID	PA	PI	Title	Lead Organization	Sponsor	Proposal Status	Routing Status
1705171	Timothy Hein	Beverly Kuhn	Intelligent Transportation Systems (ITS) Engineering Services	TTI - System Reliability	Gannett Fleming, Inc.	In Development	Not Started
1705113	Jared Conrad	Beverly Kuhn	Task Area F – Integration with and Support of other Deployment Programs: Planning for Safety, Mobility, Environmental, and Economic Opportunity Impacts Assessment of the Smart Columbus Program	TTI - System Reliability	Department of Transportation-Federal Highway Administration	Submitted To Sponsor	In Routing
1703242	Jared Conrad	Kevin Balke	Task Area B: Planning for Mobility, Environmental, and Public Agency Efficiency Impacts Assessment of CV Pilot Deployments	TTI - System Reliability	Department of Transportation-Federal Highway Administration	Submitted To Sponsor	Approved
1701318	Timothy Hein	Michael Lukuc	Commercial Truck Platooning	TTI - Connected And Automated Transportation	Texas Department of Transportation	Awarded	Approved
1700928	Jared Conrad	Beverly Kuhn	Making the Business Case for Institutional/Organizational/Process Changes for Transportation System Management and Operations (TSM&O)	TTI - System Reliability	Battelle Memorial Institute	Submitted To Sponsor	Approved
1608346	Jared Conrad	Beverly Kuhn	US-101 ATM/TDM Assessment	TTI - System Reliability	TJKM	Submitted To Sponsor	Approved

This screen shows researchers all of their proposals, regardless of who is the administering organization. The screen lists all proposals where the Researcher is the primary Principal Investigator (PI) as well as all proposals where the Researcher is a Co-Investigator (Co-Pi).

To navigate to proposal details, click the proposal number hyperlink.

**Proposal: 1705113**

PA: Jared Conrad  
PI: Beverly Kuhn

**Title:** Task Area F – Integration with and Support of other Deployment Programs: Planning for Safety, Mobility, Environmental, and Economic Opportunity Impacts Assessment of the Smart Columbus Program

**Lead Organization:** TTI - System Reliability

**Sponsor:** Department of Transportation-Federal Highway Administration

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**Proposal: 1703242**

PA: Jared Conrad  
PI: Kevin Balke

**Title:** Task Area B: Planning for Mobility, Environmental, and Public Agency Efficiency Impacts Assessment of CV Pilot Deployments

**Lead Organization:** TTI - System Reliability

**Sponsor:** Department of Transportation-Federal Highway Administration

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**Proposal: 1701318**

PA: Timothy Hein  
PI: Michael Lukuc

**Title:** Commercial Truck Platooning

**Lead Organization:** TTI - Connected And Automated Transportation

**Sponsor:** Texas Department of Transportation

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**Proposal: 1700928**

PA: Jared Conrad  
PI: Beverly Kuhn

**Title:** Making the Business Case for Institutional/Organizational/Process Changes for Transportation System Management and Operations (TSM&O)

**Lead Organization:** TTI - System Reliability

**Sponsor:** Battelle Memorial Institute

### 5.1.1 PROPOSAL GENERAL INFORMATION

Proposal (1705113)

**Title:** Task Area F – Integration with and Support of other Deployment Program  
**Sponsor:** Department of Transportation-Federal Highway Administration  
**PI:** Beverly Kuhn  
**Lead Organization:** TTI - System Reliability  
**Type:**  
**Status:**

Relationship | **General** | Personnel | Compliance | Document | Waiver Request | Budget & Cost | Reporting Code

General | Projects | FCOI Status | Subrecipient | Abstract and Keywords

Revisions Navigation

<b>Proposal Number</b> 1705113	<b>Routing Status</b> In Routing
<b>PI</b> Beverly Kuhn	<b>Total Amount</b> 694,004.1
<b>Lead Organization</b> TTI System Reliability	<b>IDC Base Amount</b> 347,076.1
<b>Center / Institute</b>	<b>IDC Base Type</b> Modified Tot
<b>Administrative Organization</b> SRS	<b>IDC Rate (%)</b> 48.500
<b>Administer For</b>	<b>IDC Amount</b> 168,332.1
<b>Release For Use by Member</b>	<b>Unrecovered Indirect</b> 12,125.1
<b>Title</b> Task Area F – Integration with and Support of other Deployment Programs: Planning for Safety, Mobility, Environmental, and	<b>IDC Level</b> Full
<b>Nickname</b>	<b>IDC Justification</b> Standard Fe
<b>Project Begin Date</b> 01-Apr-2017	<b>Cost Sharing Required</b> No

This screen displays proposal general information including:

- Title
- Sponsor
- Principal Investigator
- Lead Organization
- Administrative Organization
- Project Begin and End Dates
- Total amount requested
- Indirect Cost Information
- Checkbox indicators to denote if Cost Sharing, Budget Split, IDC Waiver, Compliance Issue, Conflict of Interest, or Subrecipient items exists on the proposal
- Proposal Administrator contact information

### 5.1.2 PERSONNEL

**Proposal (1705113)**

**Title:** Task Area F – Integration with and Support of other Deployment Program  
**Sponsor:** Department of Transportation-Federal Highway Administration  
**PI:** Beverly Kuhn  
**Lead Organization:** TTI - System Reliability  
**Type:**  
**Status:**

Relationship | General | **Personnel** | Compliance | Document | Waiver Request | Budget & Cost | Reporting Code

---

**Personnel**

Action View + X XLS NSF Report USDA Report Detach

Name	Adloc Member	Adloc Organization	Title	Role	FCOI Investigator ?	Credit(%)	Notes
Beverly Kuhn	TTI	System Reliability	Tti Senior Research Eng...	PI	✓	50.00	
Kevin Balke	TTI	System Reliability	Tti Senior Research Eng...	Co-PI	✓	25.00	
Michael Lukuc	TTI	System Reliability	Tti Research Scientist	Co-PI	✓	25.00	
						<b>100.00</b>	

This screen displays all personnel associated with the proposal and their respective role on the proposal.

### 5.1.3 COMPLIANCE

**Proposal (1705113)**

**Title:** Task Area F – Integration with and Support of other Deployment Program  
**Sponsor:** Department of Transportation-Federal Highway Administration  
**PI:** Beverly Kuhn  
**Lead Organization:** TTI - System Reliability  
**Type:**  
**Status:**

Relationship | General | Personnel | **Compliance** | Document | Waiver Request | Budget & Cost | Reporting Code

---

**Compliance Items**

Action View XLS Set All to No Detach

Compliance Item	Value	Required Additional Data	Documents
Human Subjects	Yes		0 ↑
Protected Health Information	No		0 ↕
Human Embryonic Stem Cells	No		0 ↕
Animals (Vertebrates)	No		0 ↕
Recombinant DNA and Transgenic Organisms	No		0 ↕
Biohazards	No		0 ↕
Select Agents	No		0 ↕
Involves use of Biosafety Level 3 (BSL-3) Facility BSL3 non-select agent/ABSL3	No		0 ↕

This screen displays all research compliance items that have been designated by the Principal Investigator as either being applicable or not-applicable to the proposal.

### 5.1.4 DOCUMENT

▲ Proposal (1705113)

**Title:** Task Area F – Integration with and Support of other Deployment Program **PI:** Beverly Kuhn **Type:**  
**Sponsor:** Department of Transportation-Federal Highway Administration **Lead Organization:** TTI - System Reliability **Status:**

Relationship | General | Personnel | Compliance | **Document** | Waiver Request | Budget & Cost | Reporting Code

---

▲ Sponsor Requested Documents

Action View [Icons] Load [Icons] Detach

Document	Document Type	Related Person	Required	Time Uploaded	Notes
RE TOPR 0002 DTFH6116D00	Other		No	07-Feb-2017 01:26:...	
TTI_TO_0002_Task Area F _Te	Proposal		No	07-Feb-2017 01:26:...	
TTI_TO_0002_Task Area F _Pr	Proposal		No	07-Feb-2017 01:26:...	

Columns Hidden 1

This screen displays all uploaded documents that pertain to the proposal. To view a particular document, click the hyperlinked document name.

### 5.1.5 WAIVER REQUEST

▲ Proposal (1705113)

**Title:** Task Area F – Integration with and Support of other Deployment Program **PI:** Beverly Kuhn  
**Sponsor:** Department of Transportation-Federal Highway Administration **Lead Organization:** TTI - System Reliability

Relationship | General | Personnel | Compliance | Document | **Waiver Request** | Budget & Cost

[IDC Waiver Request](#) | IP Waiver Request

---

▲ IDC Waiver Request

Action View [Icons] Detach

Doc #	Total Estimated Budget	IDC Rate Allowed (%)	IDC Rate Requested (%)	IDC Justification	Total IDC Waived	Status	Status Date
No data to display.							

Columns Hidden 4

---

▲ IDC Waiver Routing Log

Action View [Icons] Detach

Submission	Routing Status Description	Routing Start Time	Routing End Time	Submitter	Revoked By	Rejected By
------------	----------------------------	--------------------	------------------	-----------	------------	-------------

This screen displays IDC Waiver information such as Sponsor, IDC rate allowed, IDC rate requested, etc. if applicable.

### 5.1.6 BUDGET & COST

Proposal (1705113)

**Title:** Task Area F – Integration with and Support of other Deployment Program      **PI:** Beverly Kuhn      **Type:**   
**Sponsor:** Department of Transportation-Federal Highway Administration      **Lead Organization:** TTI - System Reliability      **Status:**

Relationship   General   Personnel   Compliance   Document   Waiver Request   **Budget & Cost**   Reporting Code

**Budget Split**   Cost Sharing

**Budget Split**

Action View Format + X [Table Icon] [Refresh Icon] [Detach Icon] [Wrap Icon]

Member	Organization	Direct Amount	Indirect Amount	Total
No data to display.				
<b>Total</b>				0.00

This screen displays budget split among System Member and Department if applicable as well as cost sharing information if applicable. Click the appropriate tab to view budget split or cost sharing information.

### 5.1.7 REPORTING CODE

Proposal (1705113)

**Title:** Task Area F – Integration with and Support of other Deployment Program      **PI:** Beverly Kuhn      **Type:**   
**Sponsor:** Department of Transportation-Federal Highway Administration      **Lead Organization:** TTI - System Reliability      **Status:**

Relationship   General   Personnel   Compliance   Document   Waiver Request   Budget & Cost   **Reporting Code**

**National Science Foundation (NSF) and the Texas Higher Education Coordinating Board (THECB) Codes**

Activity	1A	Conduct of Research and Development?
NSF Science and Engineering Field	2A3	Engineering - Civil?
THECB Science and Engineering Field	2A	Engineering?
THECB Character of Work	4B	Applied Research?
THECB Selection Process	5A	Peer-Reviewed?
Deepwater Horizon Oil Spill	No ?	
Underrepresented Student Included	No	
STEM Education Program	No ?	

This screen displays NSF and THECB reporting information as designated by the Principal Investigator.

### 5.1.8 RELATIONSHIP

▲ Proposal (1608279)

 Title: Active Transportation and Demand Management (ATDM) Knowledge and Technology Transfer (KTT) (under BA) PI: Beverly Kuhn Type:   
 Sponsor: Battelle Memorial Institute Lead Organization: TTI - System Reliability Status:

[Relationship](#) [General](#) [Personnel](#) [Compliance](#) [Document](#) [Waiver Request](#) [Budget & Cost](#) [Reporting Code](#)

### Research Project Relationship for Proposal (1608279)

▲ Projects	
▲ M1400545	Active Transportation and Demand Management (ATDM) Knowledge and Technology Transfer (KTT) (under BA)
▲ Proposals	
1315932	Active Transportation and Demand Management (ATDM) Knowledge and Technology Transfer (KTT)
1500607	Active Transportation and Demand Management (ATDM) Knowledge and Technology Transfer (KTT)
1608279	Active Transportation and Demand Management (ATDM) Knowledge and Technology Transfer (KTT)
▲ Billing Projects	
▲ 6026510000	Active Transportation and Demand Management (ATDM) Knowledge and Technology Transfer (KTT) (under BA)
▲ Accounts	
602651-0000	Active Transportation & Demand Mgmt(Primary Org.: System Reliability, Responsible: Kuhn, Beverly)
602651-0001	Active Transportation & Demand Mgmt(Primary Org.: System Reliability, Responsible: Kuhn, Beverly)

This screen displays the relationship between connected entities. (proposals, projects, and accounts). You can easily and quickly navigate among the various connected entities by clicking the corresponding hyperlinked project number, proposal number, billing project number, or account number.

## 6 VIEWING PROJECTS

### 6.1 ACTIVE PROJECT LIST

The Project icon navigates to the Active Project screen.

maestro Researcher 7.0.x        Beverly Kuhn   
 Change PI 07/06/17 10:48 AM

Researcher Project Search(Beverly Kuhn)

Active Projects Filter Mode Export

	Maestro Id: M1700607 Project Role: PI Project Status: Active Project End Date: 21-Jan-2018	Title: Regional Operations Forum/Summits Lead Organization: TTI - System Reliability Sponsor: Battelle Memorial Institute	Researcher Beverly Kuhn	Administrator Natlilie Johnson
	Maestro Id: M1700637 Project Role: Other Personnel Project Status: Active Project End Date: 31-Oct-2019	Title: Task Area A: Portfolio Management for Connected Vehicle (CV) Evaluation Program Lead Organization: TTI - Connected And Automated Transportation Sponsor: Department of Transportation-Federal Highway Administration	Researcher Michael Lukuc	Administrator Natlilie Johnson
	Maestro Id: M1700444 Project Role: PI Project Status: Active Project End Date: 24-Dec-2017	Title: Active Traffic Management (ATM) Implementation and Operations Guidance Lead Organization: TTI - System Reliability Sponsor: Battelle Memorial Institute	Researcher Beverly Kuhn	Administrator Natlilie Johnson
	Maestro Id: M1602968 Project Role: Other Personnel Project Status: Closing Project End Date: 28-Feb-2017	Title: Eco-Approach and Eco-Departure Small Scale Test and Evaluation: Phase 1 Modeling and Analysis Lead Organization: TTI - Connected And Automated Transportation Sponsor: Crash Avoidance Metrics Partners LLC	Researcher Michael Lukuc	Administrator Natlilie Johnson
	Maestro Id: M1602419 Project Role: Other Personnel Project Status: Active Project End Date: 30-Jun-2018	Title: Proposed Practices for the Application of Dynamic Lane Use Control Lead Organization: TTI - Signs And Markings Program Sponsor: National Academy of Science - National Cooperative Highway Research	Researcher Susan Chrysler	Administrator Frances Molitor
	Maestro Id: M1601266 Project Role: Other Personnel Project Status: Active Project End Date: 31-Aug-2017	Title: 0-5907 Communicating Information for Traveling on Managed Lane Networks Lead Organization: TTI - Mobility Management Sponsor: Texas Department of Transportation	Researcher Nicholas Wood	Administrator Sandra Moreno

This screen shows researchers all of their projects, regardless of who is the administering organization. The screen lists all active projects where the Researcher is the primary Principal Investigator (PI) as well as all active projects where the Researcher is a Co-Investigator (Co-Pi) or Other Personnel.

To navigate to project details, click the project number hyperlink.

	<b>Maestro Id:</b> <a href="#">M1700607</a> Project Role: PI Project Status: Active Project End Date: 21-Jan-2018	Title: Regional Operations Forum/Summits Lead Organization: TTI - System Reliability Sponsor: Battelle Memorial Institute
	<b>Maestro Id:</b> <a href="#">M1700537</a> Project Role: Other Personnel Project Status: Active Project End Date: 31-Oct-2019	Title: Task Area A: Portfolio Management for Connected Vehicle (CV) Evaluation Program Lead Organization: TTI - Connected And Automated Transportation Sponsor: Department of Transportation-Federal Highway Administration
	<b>Maestro Id:</b> <a href="#">M1700444</a>	Title: Active Traffic Management (ATM) Implementation and Operations Guidance Lead Organization: TTI - System Reliability Sponsor: Battelle Memorial Institute
	<b>Maestro Id:</b> <a href="#">M1602968</a> Project Role: Other Personnel Project Status: Closing	Title: Eco-Approach and Eco-Departure Small Scale Test and Evaluation: Phase 1 Modeling and Analysis Lead Organization: TTI - Connected And Automated Transportation

### 6.1.1 PROJECT GENERAL INFORMATION

**Project (M1700444)**

Title: Active Traffic Management (ATM) Implemen  
PI: Beverly Kuhn

Sponsor Name: Battelle Memorial Institute  
Sponsor Award Number: US001-601304-20

Lead Organization: TTI  
Performance Period: 04-

[Relationship](#) [General](#) [Personnel](#) [Modifications & Documents](#) [Compliance Statement](#) [Reporting Codes](#) [Deliverables](#) [SPS Report](#) [Budget period](#)

[General Info](#) [Integrity check](#) [Terms & Conditions](#) [FCIO Status](#) [Summary](#) [Closeout](#) [Sponsor Contact](#) [Notes](#)

---

<b>ID</b> M1700444	<b>Title</b> Active Traffic Management (ATM) Implementation and Operations Guidance
<b>Parent ID</b>	<b>Short Title</b>
<b>Master ID</b> M1400443	<b>Project Nickname</b> <input type="text"/>
<b>PI</b> Beverly Kuhn	<b>Performance Start Date</b> 04-Oct-2016
<b>Lead Organization</b> TTI System Reliability	<b>Performance End Date</b> 24-Dec-2017
<b>Administer for Org</b>	<b>FCOI Required</b> Yes
<b>Center / Institute</b>	<b>Funding Type</b> Fixed price
<b>Project Admin Organization</b> SRS	<b>PA Assessment Value</b>
<b>Instrument Type</b> Delivery Order/Task Order	<b>Restricted Flag</b> —
<b>Function</b> Research	<b>Classified</b> —
<b>Sponsor Name</b> Battelle Memorial Institute	
Private /Private Non Profit Foundation	
<b>Sponsor Award Number</b> US001-601304-20	

This screen displays project general information including:

- Title
- Sponsor
- Principal Investigator
- Lead Organization

- Administrative Organization
- Project Begin and End Dates
- Negotiator and Project Administrator contact information
- Terms and Conditions
- FCOI status of personnel
- Project summary information
- Project closeout information (if applicable)

Click the appropriate tab to navigate to the respective information.

The screenshot shows a navigation bar with tabs: Relationship, General (selected), Personnel, Modifications & Documents, and Compliance Statement. Below this is a sub-menu for 'General Info' containing: Integrity check, Terms & Conditions, FCOI Status, Summary, Closeout, Sponsor Contact, and Notes. A red arrow points from the 'General Info' sub-menu to the project details section below.

Project Details:

- ID: M1700444
- Parent ID: [Blank]
- Master ID: M1400443
- PI: Beverly Kuhn
- Lead Organization: TTI System Reliability
- Title: Active and O
- Short Title: [Blank]
- Project Nickname: [Blank]

### 6.1.2 PERSONNEL

The screenshot shows the 'Personnel' page for Project (M1700444). It includes a navigation bar with tabs: Relationship, General, Personnel (selected), Modifications & Documents, Compliance Statement, Reporting Codes, Deliverables, SPS Report, and Budget period. A red arrow points from the 'Personnel' tab to the table below.

Project Information:

- Title: Active Traffic Management (ATM) Implemen
- PI: Beverly Kuhn
- Sponsor Name: Battelle Memorial Institute
- Sponsor Award Number: US001-601304-20
- Lead Organization: TTI - System Reliability
- Performance Period: 04-Oct-2016 - 24-Dec-2017

PI Name	Member	Organization	Role	Credit (%)	Key Personnel	FCOI Investigator	Subject for FCOI	FCOI Comple	Begin Date	End Date	Notes	Detail
Beverly Kuhn	TTI	System Reliability	PI	100.00	—	✓	Yes, by default, based on...	✗	04-Oct-2016			Detail
Gerald Ullman	TTI	Work Zone And Dynamic Signs	Other Personnel	0.00	—	✓	Yes, by default, based on...	✗	04-Oct-2016			Detail
Nicholas Wood	TTI	System Reliability	Other Personnel	0.00	—	✓	Yes, by default, based on...	✗	04-Oct-2016			Detail
Kevin Balke	TTI	System Reliability	Other Personnel	0.00	—	✓	Yes, by default, based on...	✗	04-Oct-2016			Detail
<b>Total Credit (%)</b>				<b>100.00</b>								

This screen displays all personnel associated with the project and their respective role on the project.

### 6.1.3 MODIFICATIONS & DOCUMENTS

Revision Date: 8/4/2017

Seq.	Type	Description	Sponsor Award Number	Status	Proposal	Sponsor	Admin Org	Interim Fund Allowed	Released to SRS
1	New Award	Initial agreement	US001-601304...	Fully Executed	1606398	Battelle Memorial Institute	SRS		

Submission	Routing Status Description	Routing Start Time	Routing End Time	Submitter	Revoked By	Rejected By
1	Finished	04-Oct-2016 05:27:25 PM	04-Oct-2016 05:27:25 PM	Pauline Recek		

This screen lists the initial award and all negotiated modifications to the project. All documents related to the project may be viewed by clicking the 'Document' tab. To open a document click the hyperlinked document name.

### 6.1.4 COMPLIANCE STATEMENT

Compliance Items	Value	Required Additional Data	Definition
Human Subjects	<input type="radio"/> Yes <input checked="" type="radio"/> No		Human subject/human participant research is applicable when the proposed resea
Protected Health Information	<input type="radio"/> Yes <input checked="" type="radio"/> No		Individually identifiable health information transmitted or maintained in electronic or
Human Embryonic Stem Cells	<input type="radio"/> Yes <input checked="" type="radio"/> No		Pluripotent stem cells derived from early stage human embryos, up to and includin
Animals (Vertebrates)	<input type="radio"/> Yes <input checked="" type="radio"/> No	Edit	Vertebrate animals used for research, testing, and teaching. This includes: live ve
Recombinant DNA and Transgenic Organisms	<input type="radio"/> Yes <input checked="" type="radio"/> No		In the context of the NIH Guidelines, recombinant DNA molecules are defined as ei
Biohazards	<input type="radio"/> Yes <input checked="" type="radio"/> No		Any pathogens or potential pathogens of human, animals or plants; materials pote
Select Agents	<input type="radio"/> Yes <input checked="" type="radio"/> No	Edit	Select agents are pathogens or biological toxins which have been declared by the

This screen displays all research compliance items that have been designated by the Principal Investigator as either being applicable or not-applicable to the project. Click the 'Compliance' tab to view approval statuses for any items marked 'Yes'.

Relationship General Personnel Modifications & Documents Compliance Statement Reporting Codes Deliverables SPS Report Budget period

PI Compliance Statement **Compliance**

Project Compliance

Action View + X Print Refresh Detach

Compliance Item	Additional Data	Status Date	Expiration Date	Status	Authorization Number	Approvals
Human Subjects		12-Sep-2016	12-Mar-2017	Modified approval		View

Columns Hidden 5

### 6.1.5 REPORTING CODES

Project (M1602419)

Title: Proposed Practices for the Application of PI: Susan Chrysler Sponsor Name: National Academy of Science - National Cooperative High Lead Organization: TTI - Sponsor Award Number: HR 03-123 - SUB0000833 - NAS 150 TO 25 Performance Period: 01-J

Relationship General Personnel Modifications & Documents Compliance Statement **Reporting Codes** Deliverables SPS Report Budget period

National Science Foundation (NSF) and the Texas Higher Education Coordinating Board (THECB) Codes

Activity	1A	Conduct of Research and Development?
NSF Science and Engineering Field	2A3	Engineering - Civil?
THECB Science and Engineering Field	2A	Engineering?
THECB Character of Work	4B	Applied Research?
THECB Selection Process	5A	Peer-Reviewed?
Deepwater Horizon Oil Spill	No ?	
NSF Category	OTHER	Other?
Underrepresented Student Included	No	
STEM Education Program	No ?	
Function	Research	

This screen displays NSF and THECB reporting information as designated by the Principal Investigator.

### 6.1.6 DELIVERABLES

Project (M1700444)

Title: Active Traffic Management (ATM) Implemen  
PI: Beverly Kuhn

Sponsor Name: Battelle Memorial Institute  
Sponsor Award Number: US001-601304-20

Lead Organization: TT  
Performance Period: 04

Relationship | General | Personnel | Modifications & Documents | Compliance Statement | Reporting Codes | **Deliverables** | SPS Report | Budget period

**Deliverables Pending**

Action View + Edit Delete Print Detach

Category	Type	Frequency	Status	Final Due Date	Recipient	Recipient Due
Financial Report	Invoice	Final	Pending		Battelle Memorial In...	23-Feb-2018
Technical Report	Technical Report	Final	Pending		Battelle Memorial In...	24-Dec-2017

Columns Hidden 21

**Deliverables Completed**

Action View Print Detach

Category	Type	Frequency	Status	Final Due Date	Recipient	Recipient Due
No data to display.						

Columns Hidden 22

This screen displays pending and completed project deliverables.

To 'Complete' a deliverable, highlight the deliverable to be completed, and select Action>Complete

**Deliverables Pending**

Action View + Edit Delete Print Detach

- Create
- Edit
- Duplicate
- Delete
- Complete**
- Export To Excel

Type	Frequency	Status	Final Due Date	Recipient	Recipient Due
Invoice	Final	Pending		Battelle Memorial In...	23-Feb-2018
Technical Report	Final	Pending		Battelle Memorial In...	24-Dec-2017

**Deliverables Completed**

### 6.1.7 SPS REPORT

Project (M1700444)

Title: Active Traffic Management (ATM) Implemen  
 PI: Beverly Kuhn

Sponsor Name: Battelle Memorial Institute  
 Sponsor Award Number: US001-601304-20

Lead Organization: TTI  
 Performance Period: 04-

Relationship | General | Personnel | Modifications & Documents | Compliance Statement | Reporting Codes | Deliverables | SPS Report | Budget period

---

Project SPS Report

Action From: 1 | Action To: 1 | Run SPS Report

---

Routing Log

Action | View | Detach

Submission	Routing Status Description	Routing Start Time	Routing End Time	Submitter	Revoked By	Rejected By
1	Finished	15-Nov-2016 02:58:25 PM	15-Nov-2016 02:58:33 PM	Debra Hodge		

This screen allows viewing of the Sponsored Project Summary report for any actions recorded on the project.

### 6.1.8 BUDGET PERIOD

Project (M1700444)

Title: Active Traffic Management (ATM) Implemen  
 PI: Beverly Kuhn

Sponsor Name: Battelle Memorial Institute  
 Sponsor Award Number: US001-601304-20

Lead Organization: TTI - System Reliability  
 Performance Period: 04-Oct-2016 - 24-Dec-2017

Relationship | General | Personnel | Modifications & Documents | Compliance Statement | Reporting Codes | Deliverables | SPS Report | Budget period

Billing Project | Funding Period | Cost Sharing | IDC | Actions

---

FAMIS Billing Project

Action | View | Detach

Member	Billing Project	Sponsor Name	Sponsor Award Number	Status	Amount	Budget Start Date	Budget End Date	Closeout Needed	Carry Forward	Revise Freeze Date
12	6078210000	Battelle Memorial institute	US001-601304-20	Active	80,000.00	04-Oct-2016	24-Dec-2017	No	Allowed	

Columns Hidden: 11

---

Billing Project Accounts (6078210000)

Action | View | Detach

Member	Account Number	Setup Date	Account Name	Responsible Person	Budget	Expenditure	Encumbrance	Direct Balance	Indirect Balance	Total Balance	Revenue Budget	Revenue Actual
12	607821-00000	17-Oct-2016	Active Traffic Management (Atm) Imp	Beverly Kuhn	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
12	607821-00001	17-Oct-2016	Active Traffic Management (Atm) Imp	Beverly Kuhn	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
					0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

This screen displays the relationship between Maestro project and FAMIS SPR project (billing project). Budget, Expenditures, Encumbrances, and Balance information is displayed for all accounts linked to the project.

This screen also displays information on Funding Period, Cost Sharing, Indirect Cost Rates, and project actions (as applicable). Click the appropriate tab to navigate to the respective information.

Project (M1700444)

Title: Active Traffic Management (ATM) Implemen  
PI: Beverly Kuhn

Sponsor Name: Battelle Memorial Institute  
Sponsor Award Number: US001-601304-20

Lead Organization: TTI - System  
Performance Period: 04-Oct-2016

Relationship | General | Personnel | Modifications & Documents | Compliance Statement | Reporting Codes | Deliverables | SPS Report | Budget period

Billing Project | Funding Period | Cost Sharing | IDC | Actions

### 6.1.9 RELATIONSHIP

Project (M1700444)

Title: Active Traffic Management (ATM) Implemen  
PI: Beverly Kuhn

Sponsor Name: Battelle Memorial Institute  
Sponsor Award Number: US001-601304-20

Lead Organization: TTI - System Reliability  
Performance Period: 04-Oct-2016 - 24-Dec-2017

Relationship | General | Personnel | Modifications & Documents | Compliance Statement | Reporting Codes | Deliverables | SPS Report | Budget period

Research Project Relationship for Project (M1700444)

Projects	
<ul style="list-style-type: none"> <li>M1700444 Active Traffic Management (ATM) Implementation and Operations Guidance</li> <li>Proposals                             <ul style="list-style-type: none"> <li>1606398 Active Traffic Management (ATM) Implementation and Operations Guidance</li> </ul> </li> <li>Billing Projects                             <ul style="list-style-type: none"> <li>6078210000 Active Traffic Management (ATM) Implementation and Operations Guidance</li> <li>Accounts                                     <ul style="list-style-type: none"> <li>607821-00000 Active Traffic Management (Atm) Imp/Primary Org., System Reliability, Responsible: Kuhn, Beverly</li> <li>607821-00001 Active Traffic Management (Atm) Imp/Primary Org., System Reliability, Responsible: Kuhn, Beverly</li> </ul> </li> </ul> </li> <li>Master Project                             <ul style="list-style-type: none"> <li>M1400443 12-929 Task Order Agreement No. 601304 Between Battelle Memorial Institute and Texas A&amp;M Transportation Institute</li> </ul> </li> </ul>	

This screen displays the relationship between connected entities. (proposals, projects, and accounts). You can easily and quickly navigate among the various connected entities by clicking the corresponding hyperlinked project number, proposal number, billing project number, or account number.

## 7 FINANCIAL CONFLICT OF INTEREST DISCLOSURE

The Disclosure icon navigates to the Disclosure Dashboard.

maestro Researcher 7.x.x

Dashboard | Account | Proposal | Project | Disclosure | Worklist | Maestro

5 Tye Rougas Change PI 07/07/17 03:57 PM

**Disclosure Actions**

- Create New Disclosure
- Historical Disclosures

**COI Officials Contacts**

TAMU : Carol Cantrell  
(979) 862-1478, c-cantrell@tamu.edu

TAMU : Amanda Reitmayer  
(979) 458-8538, areitmayer@tamu.edu

TAMU : Alyce Hlavaty  
(979) 862-6307, anghedi@ag.tamu.edu

TAMU : Lesa Feldhausen  
(979) 862-7986, lfeldhausen@tamu.edu

**Disclosure Status**

Time until next disclosure: 365 days

Last Disclosure Date: 07-Jul-2017

Disclosure Expiration 07-Date: Jul-2018

**Previously Disclosed Significant Financial Interest**

PI/Family Member Covered	Source/Company Name	Description	Value (in whole \$)	Notes
No data to display.				

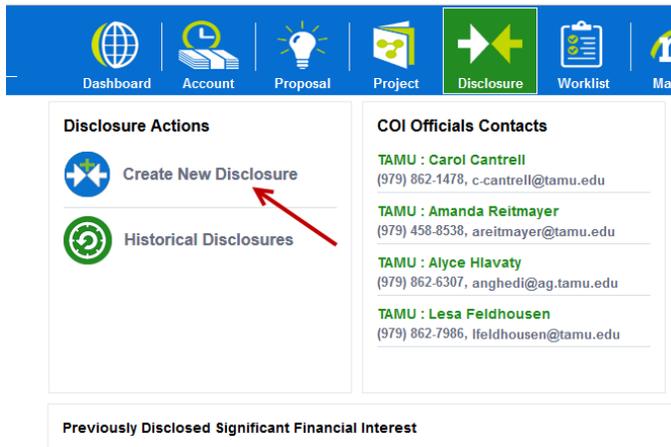
From the disclosure dashboard, you can:

Revision Date: 8/4/2017

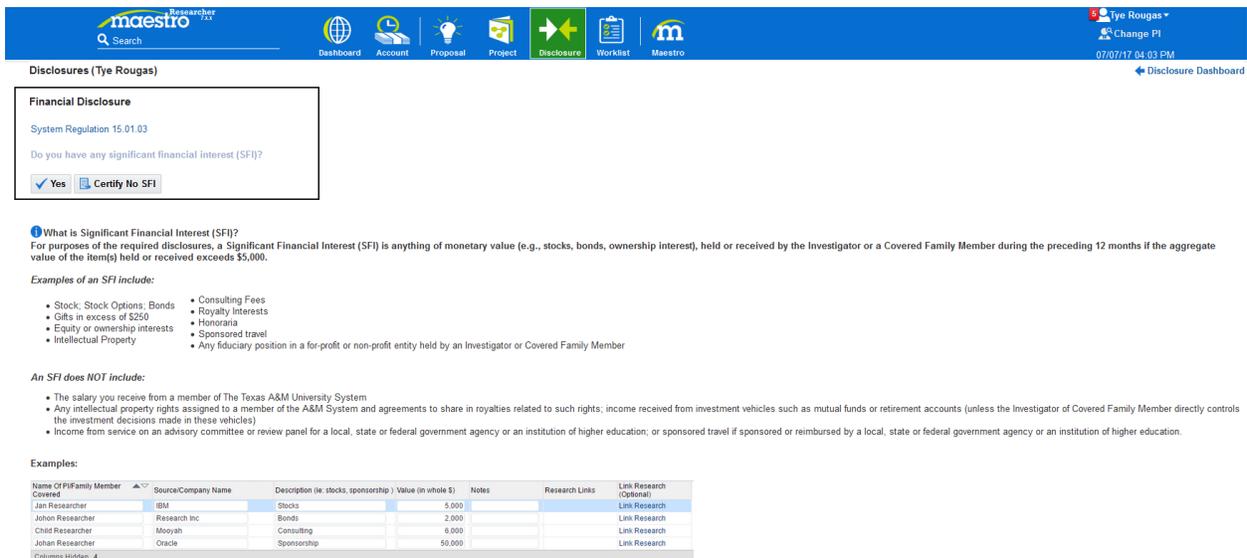
- Create a new disclosure
- View historical disclosures
- View contact information for your Conflict of Interest Official(s)
- View disclosure status information
- View previously disclosed significant financial interest (if applicable)

### 7.1 CREATE A NEW DISCLOSURE

To create a new disclosure, click the Create New Disclosure icon located under the Disclosure Actions section.



This will navigate you to the Financial Disclosure page where you will specify whether there is a Significant Financial Interest or not.



### 7.1.1 NO SIGNIFICANT FINANCIAL INTEREST TO DISCLOSE

Click on the 'Certify No SFI' Button

The screenshot shows the Maestro Researcher Portal interface. At the top, there is a navigation bar with icons for Dashboard, Account, Proposal, Project, Disclosure, and Maestros. The user's name 'Tye Rougas' and the date '07/07/17 04:03 PM' are visible in the top right. The main content area is titled 'Disclosures (Tye Rougas)' and 'Financial Disclosure'. A question asks 'Do you have any significant financial interest (SFI)?' with two radio buttons: 'Yes' and 'Certify No SFI'. A red arrow points to the 'Certify No SFI' button. Below this, there is a definition of SFI and a list of examples. At the bottom, there is a table with columns for Name of Family Member Covered, Source/Company Name, Description, Value, Notes, Research Links, and Link Research (Optional).

Name of Family Member Covered	Source/Company Name	Description (ie. stocks, sponsorship)	Value (in whole \$)	Notes	Research Links	Link Research (Optional)
Jan Researcher	IBM	Stocks	5,000			Link Research
Johan Researcher	Research Inc	Bonds	2,000			Link Research
Child Researcher	Mooyah	Consulting	6,000			Link Research
Johan Researcher	Oracle	Sponsorship	50,000			Link Research

This will complete your certification with no further action needed on your part.

The screenshot shows the same SFI disclosure page as above, but with a 'Submission Confirmation' dialog box overlaid in the center. The dialog box contains the text: 'Disclosure has been submitted successfully. If you want to make any changes please create a new disclosure from the Disclosures > My Disclosures Screen.' and an 'OK' button.

### 7.1.2 SIGNIFICANT FINANCIAL INTEREST TO DISCLOSE

Click on the 'Yes' button

**Disclosures (Tye Rougas)**

**Financial Disclosure**

System Regulation 15.01.03

Do you have any significant financial interest (SFI)?

**Yes**  Certify No SFI

**What is Significant Financial Interest (SFI)?**  
For purposes of the required disclosures, a Significant Financial Interest (SFI) is anything of monetary value (e.g., stocks, bonds, ownership interest), held or received by the Investigator or a Covered Family Member during the preceding 12 months if the aggregate value of the interests held or received exceeds \$5,000.

**Examples of an SFI include:**

- Stock; Stock Options; Bonds
- Gifts in excess of \$250
- Equity or ownership interests
- Intellectual Property
- Consulting Fees
- Royalty Interests
- Honoraria
- Sponsored travel
- Any fiduciary position in a for-profit or non-profit entity held by an Investigator or Covered Family Member

**An SFI does NOT include:**

- The salary you receive from a member of The Texas A&M University System
- Any intellectual property rights assigned to a member of the A&M System and agreements to share in royalties related to such rights; income received from investment vehicles such as mutual funds or retirement accounts (unless the Investigator of Covered Family Member directly controls the investment decisions made in these vehicles)
- Income from service on an advisory committee or review panel for a local, state or federal government agency or an institution of higher education; or sponsored travel if sponsored or reimbursed by a local, state or federal government agency or an institution of higher education.

**Examples:**

Name Of PI/Family Member Covered	Source/Company Name	Description (ie: stocks, sponsorship )	Value (in whole \$)	Notes	Research Links	Link Research (Optional)
Jan Researcher	IBM	Stocks	5,000			Link Research
Johan Researcher	Research Inc	Bonds	2,000			Link Research
Child Researcher	Mooyah	Consulting	6,000			Link Research
Johan Researcher	Oracle	Sponsorship	50,000			Link Research

Click on the Create SFI button (circled in red below). If you are having any problems, click the COI Contact button (underlined in dark green below).

**Disclosures (Arijan Horvat)**

**Significant Financial Interest (SFI) - Discloser#(49673)**

System Regulation 15.01.03

Click the **?** help button for more help.

Please review the list below and add any other significant financial interests by clicking 'Create SFI' button in the action menu and filling in the details provided. (Optional) Click 'Link Research' hyperlink in the last column to link your research to this SFI.

**Researcher's Significant Financial Interest Related To Institutional Responsibilities (as defined in System Regulation 15.01.03)**

Action: **+** Create SFI, Remove SFI, Detach

Name Of PI/Family Member Covered	Source/Company Name	Description (ie: stocks, sponsorship )	Value (in whole \$)	Notes	Research Links	Link Research (Optional)
No data to display.						

Columns Hidden: 4

Please add any Conflict Resolution Plans or other supporting documents here.

**Conflict Resolution Plan Attachments**

Action: View, Upload, Download, Delete, Detach

Document	Uploaded By	Time Uploaded	Notes
No data to display.			

Columns Hidden: 4

Enter in the information for your SFI. For this guide, we gave an example of John Doe who owns \$500,000 in stock at Apple.

Disclosures (Arijan Horvat)

Significant Financial Interest (SFI) - Discloser#(49673)

System Regulation 15.01.03

Click the help button for more help.

Please review the list below and add any other significant financial interests by clicking 'Create SFI' button in the action menu and filling in the details provided. (Optional) Click 'Link Research' hyperlink in the last column to link your research to this SFI.

Name Of PI/Family Member Covered	Source/Company Name	Description (ie: stocks, sponsorship )	Value (in whole \$)	Notes	Research Links	Link Research (Optional)
John Doe	Apple	Stocks	500,000			Link Research

Conflict Resolution Plan Attachments

Next Step COI Contact Save Cancel

You may also choose to link your research to your SFI. You may do this by clicking the Link Research hyperlink for each individual SFI. Linking your research to a SFI is optional.

Disclosures (Arijan Horvat)

Significant Financial Interest (SFI) - Discloser#(49673)

System Regulation 15.01.03

Click the help button for more help.

Please review the list below and add any other significant financial interests by clicking 'Create SFI' button in the action menu and filling in the details provided. (Optional) Click 'Link Research' hyperlink in the last column to link your research to this SFI.

Name Of PI/Family Member Covered	Source/Company Name	Description (ie: stocks, sponsorship )	Value (in whole \$)	Notes	Research Links	Link Research (Optional)
John Doe	Apple	Stocks	500,000			Link Research

Conflict Resolution Plan Attachments

Next Step COI Contact Save Cancel

**TO LINK RESEARCH:** Check the box for the corresponding research that applies to your SFI. Click the Save button, located at the top right corner of your screen. Return to your SFI homepage by clicking the SFI List button, located next to your save button.

maestro Researcher 7.0.0

Dashboard Account Proposal Project Disclosure Worklist Advance

Disclosures (Arijan Horvat)

Link Significant Financial Interest (John Doe - Apple - Stocks)

System Regulation 15.01.03

Research Or Research Activity (As Defined In System Regulation 15.01.03)

Link	Research	Number	Title	Sponsor	Status
<input type="checkbox"/>	Proposal	1705715	Proposal demonstration.	3M Company	
<input type="checkbox"/>	Proposal	1705718	Proposal demonstration 2.	3M Company	
<input type="checkbox"/>	Proposal	1705719	Proposal demonstration 3.	3M Company	
<input type="checkbox"/>	Proposal	1705722	Proposal demonstration 4.	3M Company	

At the bottom of your SFI page, you may also upload conflict resolution plans. This is also optional.

maestro Researcher 7.0.0

Dashboard Account Proposal Project Disclosure Worklist Advance

Disclosures (Arijan Horvat)

Significant Financial Interest (SFI) - Discloser#(49673)

System Regulation 15.01.03

Researcher's Significant Financial Interest Related To Institutional Responsibilities (as defined in System Regulation 15.01.03)

Name Of PJ/Family Member Covered	Source/Company Name	Description (ie: stocks, sponsorship )	Value (in whole \$)	Notes	Research Links	Link Research (Optional)
John Doe	Apple	Stocks	500,000			Link Research

Conflict Resolution Plan Attachments

Document	Uploaded By	Time Uploaded	Notes
No data to display.			

Click the Save button, located at the top right corner of your screen. Then click the Next Step button, also located at the top right corner of your screen.

Disclosures (Arijan Horvat)

Significant Financial Interest (SFI) - Discloser#(49673)

System Regulation 15.01.03

Click the button for more help.

Please review the list below and add any other significant financial interests by clicking "Create SFI" button in the action menu and filling in the details provided. (Optional) Click "Link Research" hyperlink in the last column to link your research to this SFI.

**Researcher's Significant Financial Interest Related To Institutional Responsibilities (as defined in System Regulation 15.01.03)**

Name Of PI/Family Member Covered	Source/Company Name	Description (ie: stocks, sponsorship )	Value (in whole \$)	Notes	Research Links	Link Research (Optional)
John Doe	Apple	Stocks	500,000			Link Research

Columns Hidden: 4

Please add any Conflict Resolution Plans or other supporting documents here.

**Conflict Resolution Plan Attachments**

Document	Uploaded By	Time Uploaded	Notes
No data to display.			

Columns Hidden: 4

Next Step COI Contact Save Cancel

Review all of the information to make sure it is correct. Then click the Certify and Submit button.

Disclosures (Arijan Horvat)

Certification

System Regulation 15.01.03  
Last updated on 09-Jun-2017 by

**Researcher's Certification**

I certify that the information provided is true and correct to the best of my knowledge. I further certify that I have read System Regulation 15.01.03 Financial Conflict Of Interest in Research and the applicable system member rule and that I am aware of and understand my responsibilities and applicable federal regulations and system policies regarding disclosure of Significant Financial Interests.

**Disclosure Summary**

Name Of PI/Family Member Covered	Source/Company Name	Description (ie: stocks, sponsorship )	Value (in whole \$)	Notes	Research Links
No data to display.					

Columns Hidden: 4

Certify and Submit COI Contact Print Back

## 7.2 VIEW HISTORICAL DISCLOSURES

To view Historical Disclosures, click the Historical Disclosures icon located under the Disclosure Actions section.

Disclosure Actions

- Create New Disclosure
- Historical Disclosures**

COI Officials Contacts

TAMU : Carol Cantrell  
(979) 862-1478, c-cantrell@tamu.edu

TAMU : Amanda Reitmayer  
(979) 458-8538, areitmayer@tamu.edu

TAMU : Alyce Hlavaty  
(979) 862-6307, anghedi@ag.tamu.edu

TAMU : Lesa Feldhousen  
(979) 862-7986, lfeldhousen@tamu.edu

This will navigate you to the Disclosure page where you will see a listing of your disclosure history. There can only be one 'Active' disclosure and this is denoted by the checkmark in the Active column. To view details about a disclosure click the hyperlinked disclosure number.

**Disclosures (Tye Rougas)**

► Search

Action ▾ View ▾ [+ Create Disclosure](#) [Edit Disclosure](#) [Remove Disclosure](#) [Print](#) [Refresh](#) [Detach](#)

Disclosure #	Submit Date	Expiration Date	Need COIO Review	Review Status	Review Date	Active
<a href="#">49732</a>	07-Jul-2017	07-Jul-2018	No			✓
<a href="#">49730</a>	07-Jul-2017	07-Jul-2018	No			—
<a href="#">49483</a>	01-Mar-2017		Yes	Closed		—
<a href="#">49482</a>	01-Mar-2017		Yes	Closed		—
<a href="#">44265</a>	10-Oct-2016	10-Oct-2017	No			—
<a href="#">20924</a>	09-Dec-2013	09-Dec-2014	No			—

**7.3 VIEW CONTACT INFORMATION FOR YOU CONFLICT OF INTEREST OFFICIAL**

The 'COI Officials Contacts' section of the disclosure dashboard contains contact information for the Researcher's Conflict of Interest Officials.

**Disclosure Actions**

- Create New Disclosure
- Historical Disclosures

**COI Officials Contacts**

- TAMU : Carol Cantrell (979) 862-1478, c.cantrell@tamu.edu
- TAMU : Amanda Reitmayer (979) 458-8538, areitmayer@tamu.edu
- TAMU : Alyce Hlavaty (979) 862-6307, anghedi@ag.tamu.edu
- TAMU : Lesa Feldhausen (979) 862-7986, lfeldhausen@tamu.edu

**Disclosure Status**

- Time until next disclosure: 362 days
- Last Disclosure Date: 07-Jul-2017
- Disclosure Expiration Date: Jul-2018

**Previously Disclosed Significant Financial Interest**

PI/Family Member Covered	Source/Company Name	Description	Value (in whole \$)	Notes
No data to display.				

**7.4 VIEW DISCLOSURE STATUS INFORMATION**

The 'Disclosure Status' section of the disclosure dashboard contains information on time until next disclosure (in days), last disclosure date, and when the current disclosure expires.

The screenshot shows the Maestro Researcher Portal interface. The top navigation bar includes icons for Dashboard, Account, Proposal, Project, Disclosure (highlighted), Worklist, and Maestro. The user is identified as Tye Rougas. The main content area is divided into three columns: Disclosure Actions (Create New Disclosure, Historical Disclosures), COI Officials Contacts (listing Carol Cantrell, Amanda Reitmayer, Alyce Hlavaty, and Lesa Feldhausen), and Disclosure Status (Time until next disclosure: 362 days, Last Disclosure Date: 07-Jul-2017, Disclosure Expiration Date: Jul-2018). Below these is a section for 'Previously Disclosed Significant Financial Interest' with a table that currently shows 'No data to display'.

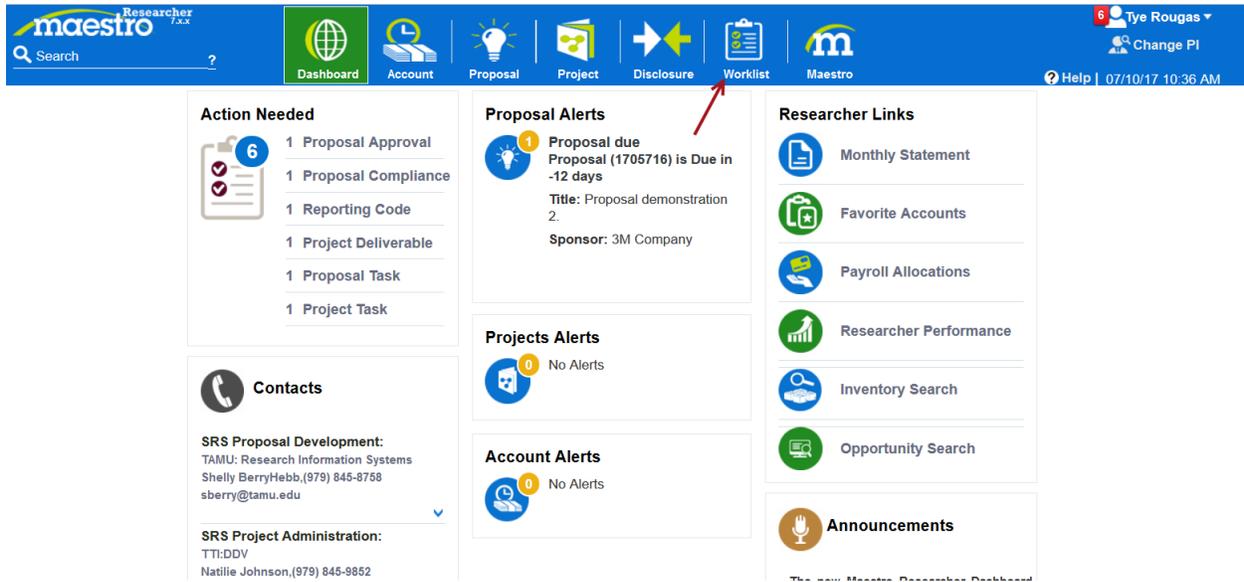
### 7.5 VIEW PREVIOUSLY DISCLOSED SIGNIFICANT FINANCIAL INTEREST

The ‘Previously Disclosed Significant Financial Interest’ section of the disclosure dashboard contains information on previously disclosed significant interest made by the researcher. (if applicable)

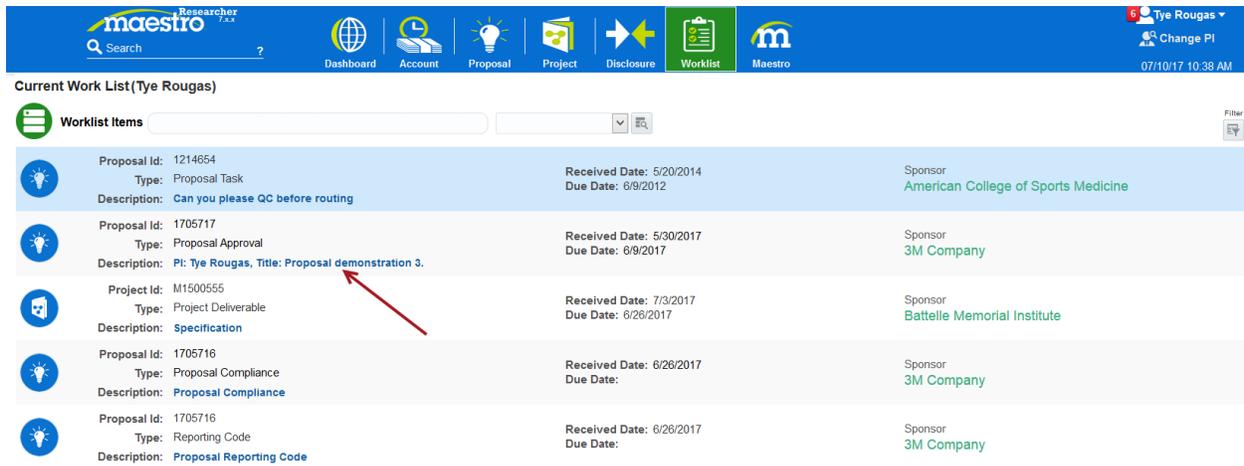
This screenshot is identical to the one above, but the 'Previously Disclosed Significant Financial Interest' section is highlighted with a red box. The table in this section is empty, displaying 'No data to display'.

## 8 WORKLIST

To navigate to a listing of all items needing action, click on the ‘Worklist’ icon.



From this screen, you can navigate to a specific item by clicking on the description hyperlink.



## 9 MAESTRO STANDARD MODE

To switch from Researcher Portal mode to Maestro Standard Mode, click the 'Maestro Standard Mode' icon.

To switch back to Researcher Portal mode, click the 'Researcher Portal' mode icon or select 'Researcher Portal' from the settings drop down list.