

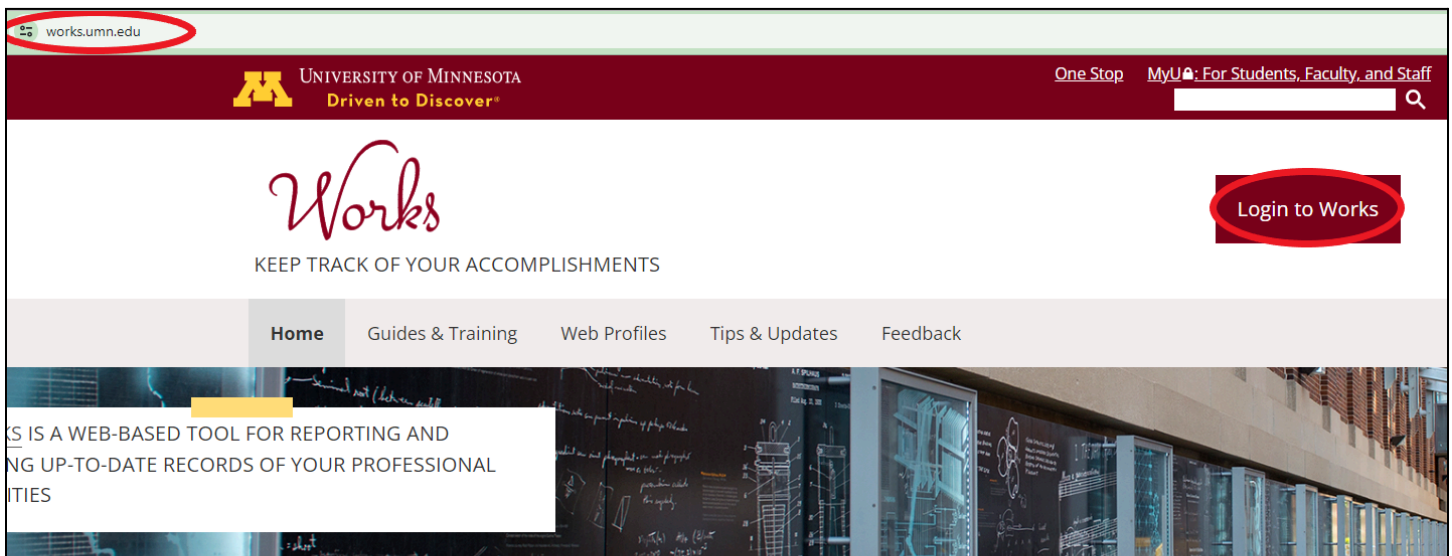
Works Instruction Guide for Departments (How to Correct and Import Grant Details)

Introduction and overview

This handout is designed for faculty and departmental staff within The University of Minnesota Medical School (UMMS) using the Works system for faculty annual reviews. Faculty and staff will be able to follow this guide on how to correct and import grants through the Sponsored Projects Administration (SPA) database.

Step 1: Log in to the Works System.

Log in to works.umn.edu using your UMN credentials.



Step 2: Access and Review Imported Data.



imported information and annotate as necessary. Contact worksadm@umn.edu if you need assistance importing data.

Scholarship/Research/Creative Activities

Publications and Other Intellectual Contributions

Presentations

Creative and Artistic Practice, Performances, and Exhibits

Grants, Sponsored Research, and Contracts (Imported data) - Proposals SPA | Awards SPA | Projects SPA

Other Grants, Contracts, Gifts, or Earnings (manual entry)

Collaboration and Research/Creative Activity in Progress

Patents and Intellectual Property

Scholarly Reviews of/Commentaries on My Work

SPA data is broken into three sections: “Proposals SPA”, “Awards SPA”, and “Projects SPA”. Grants on which faculty are listed as an investigator will automatically appear in Works, but faculty are able to augment imported information by adding sponsor titles, amounts, descriptions, public/international engagement etc. for reporting purposes.

- SPA is the system of record for grant data displayed in Works. Any changes to grant status or co-investigators must be made by the faculty’s unit’s grant administrator in SPA.
- SPA data is imported on a weekly basis. Any changes or updates made in SPA will show in Works within one week.

Faculty will not be able to update the imported data fields, instead they can use the "override" fields to update what's reflected on their report. See example below:

Proposal Status

Discontinued

Override this status using the below dropdown.

Proposal Status (Override imported status)

Submitted

Not Funded

Discontinued

Save your entries if you made any override changes to your record.

A rectangular box containing two buttons. On the left is a white button with a blue border labeled "CANCEL". On the right is a solid blue button labeled "SAVE" with a white icon of a floppy disk to its left.

Step 3: Manual Entry (optional).

Internal grants or external grants received while at a different institution should be entered on the “Other Grants, Awards, Gifts, or Endowment Earnings (manual entry)” screen.

A menu titled "Scholarship/Research/Creative Activities". It lists several options: "Publications and Other Intellectual Contributions", "Presentations", "Creative and Artistic Practice, Performances, and Exhibits", "Grants, Sponsored Research, and Contracts (Imported data) - Proposals SPA | Awards SPA | Projects SPA", "Other Grants, Contracts, Gifts, or Earnings (manual entry)", "Collaboration and Research/Creative Activity in Progress", "Professional Practice Projects", "Patents and Intellectual Property", and "Scholarly Reviews of/Commentaries on My Work". The option "Other Grants, Contracts, Gifts, or Earnings (manual entry)" is circled in red.

Select add new and manually enter external University grants and any other funding not already appearing on the "Grants, Sponsored Research, and Contracts (Imported Data)" screens.

A screenshot of the "Other Grants, Contracts, Gifts, or Earnings (manual entry)" screen. At the top, there is a search bar and buttons for "SEARCH", "Search Tips", and "Rapid Rep". Below this is a descriptive paragraph. A row of buttons includes "DUPLICATE", "COMPARE", and "ADD NEW", with "ADD NEW" circled in red. To the right is a "SELECT COLUMNS" button. Below the buttons, there is a "Filters: None" section and a table with columns: "ALSO PRINT T...", "TITLE", "SPONSORING ORG...", "INTERNAL/EX...", "CURRENT STA...", "YEAR, DATE P...", "YEAR, PROPO...", "YEAR, PROPO...", and "Y". The first row of data shows "True", "Imagine Fund Grant", "University of Minnesota", "Internal", "Funded", and several empty date/proposal year fields.

Save your entries once completed or save + add new if you want to enter a record of the same type of activity.

A rectangular box containing three buttons. On the left is a white button with a blue border labeled "CANCEL". In the middle is a solid blue button labeled "SAVE" with a white icon of a floppy disk to its left. On the right is a white button with a blue border labeled "SAVE + ADD NEW" with a white icon of a floppy disk and a plus sign to its left.

Additional Resources:

- A guide detailing how you can **import all your citations** from Google Scholar or other databases is available [here](#). Contact worksadm@umn.edu if you need assistance importing data.