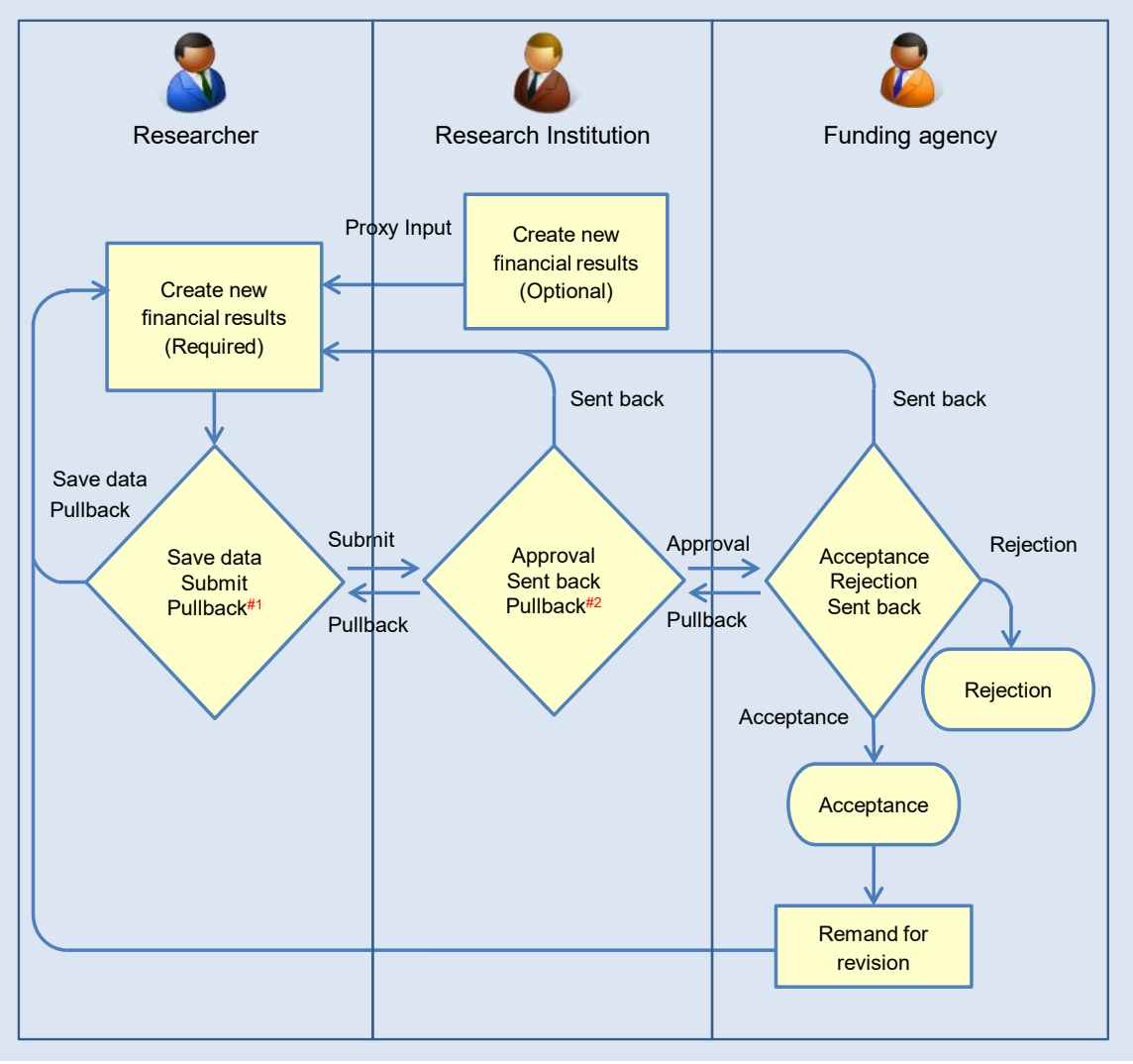
5. Financial Results

About Financial Results

You can register income and expenses for each project and submit these details to the Funding agency in a report on income and expenses.

Process for Financial Results



#1. You can pull back until approved by Research Institution

#2. You can pull back until accepted by Funding agency

Basic Operations

- Create new financial results

  Create new financial results.

  → "5.1 Creating New Financial Results"

- Resume saved input

  You can register financial results based on input details that you have saved or details created by the administrative manager.

  → "5.2 Resuming Saved Input"

- Check registered details

  You can check the details of your financial results after registering them.

  → "5.3 Checking Registered Details"

- Registering the report members

  You can register the results' report members and set the right of viewing/editing.

  → "5.4 Registering The Report Members"

- Pulling back financial results

  You can pull back financial results that you have submitted.

  → "5.5 Pulling Back Financial Results"

- Delete financial results

  You can delete financial results.

  → "5.6 Deleting Financial Results"

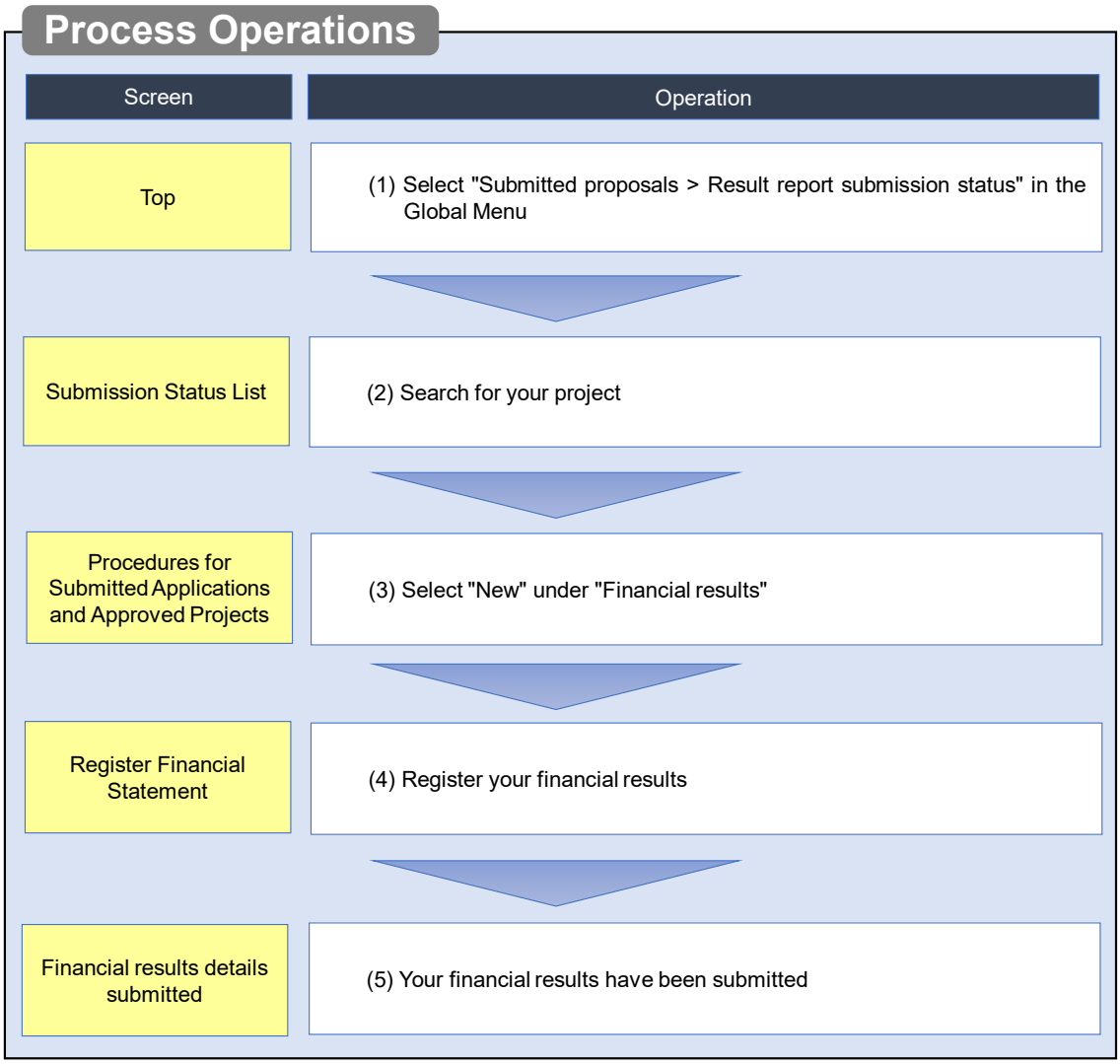
- Import financial results

  You can register financial results in union.

  → "5.7 Importing Financial Results"

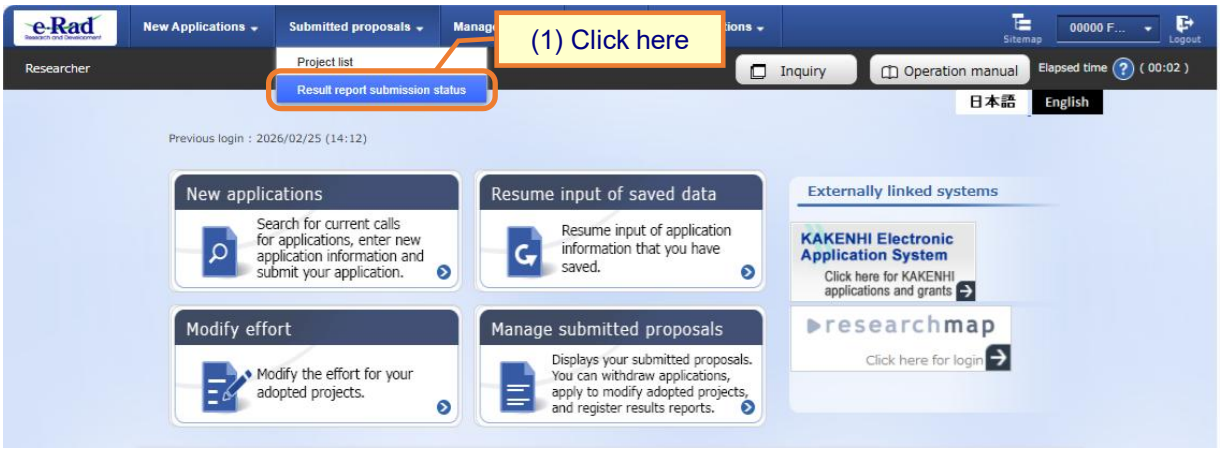
5.1 Creating New Financial Results

This section explains how to create new financial results.



Instructions

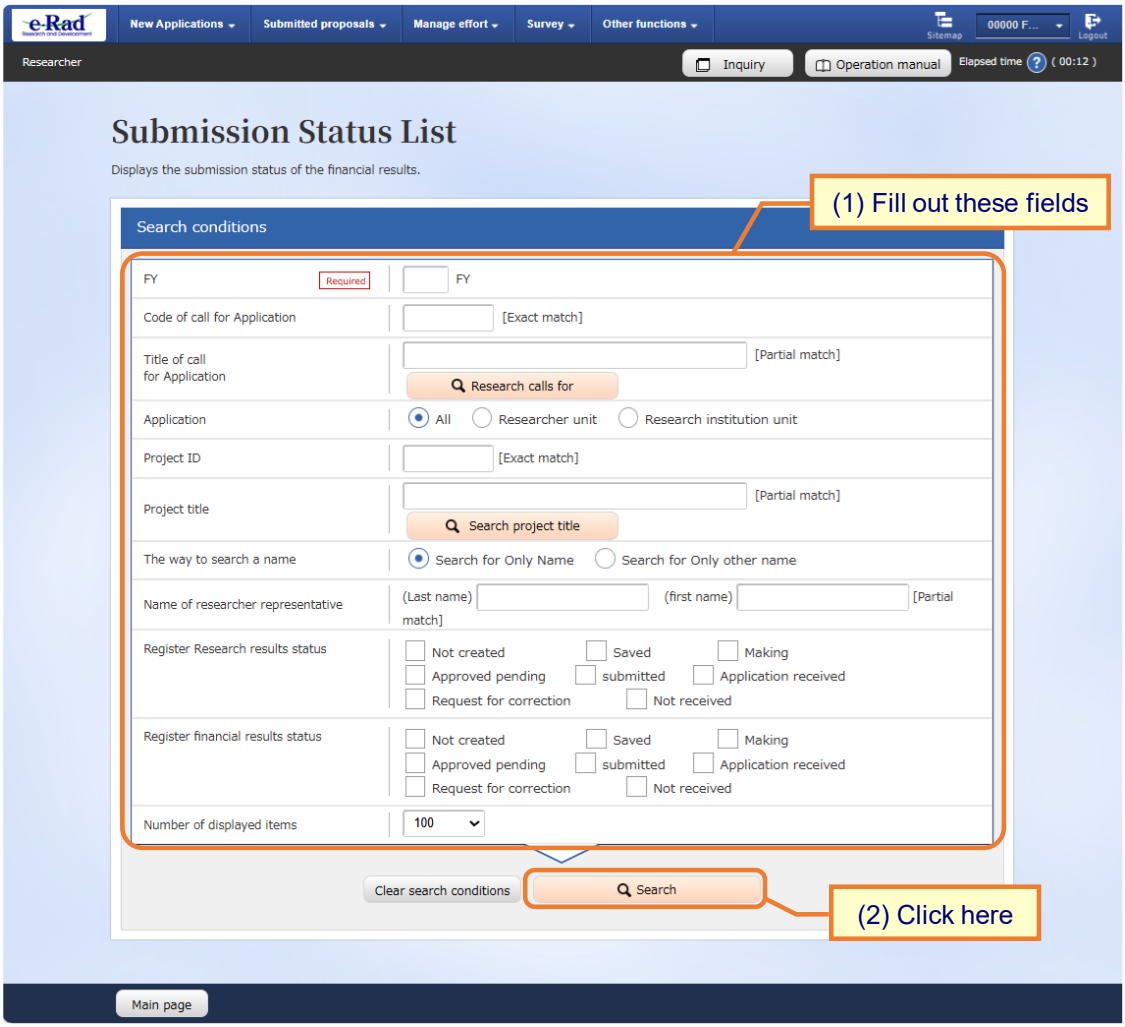
(1) Selection in the Global Menu



(1) Click "Submitted proposals > Result report submission status" in the Global Menu on the top screen.

(2) Search for your project

The [Submission Status List] screen is displayed.



(1) Input search terms. Input of year is required.

(2) Click the "Search" button.

The search results are displayed.

(3) Click the "Financial results" button under "Edit/Inquiry".

Note Financial results PDF batchdownload

- Click on the “Financial results PDF batchdownload” link to download the results submission status list of search results that all projects’ financial results are displayed in the results in a PDF file at once. Downloading is possible from “Others> Processing result list” in the global menu.

Note Download search results (Financial results)

- Click the “Download search results (Financial results)” link to search the results submission status list.You can download the results in CSV format. Downloading is possible from “Others> Processing result list” in the global menu.

Note | Status

○ Status for managing financial results submission status.

■ Status for each status

Status	Condition
Unregistered	・ Financial information is not registered.
Temporarily saved	・ Financial results are temporarily saved.
Under reporter processing	・ State after submitting financial results and withdrawing or sending back.
Processing research institute	・ Submit financial results and wait for research institution approval.
Funding agency processing	・ Financial results submitted and approved by research institution.
Accepted	・ The financial results are accepted by the Funding agency.
Requesting revision	・ Request for correction after the Funding agency has accepted the financial results.
Unacceptable	・ State in which the Funding agency has rejected the financial results.
－	・ If you are not participating in a research organization. ・ When the conditions for submitting financial results are not set.
(Report unrequired)	・ In the condition of submitting financial results, the necessity of reporting is "unnecessary".

(3) Select "New" under "Financial results"

The [Procedures for Submitted Applications and Approved Projects] screen is displayed.

(1) Click the "New" button under "Financial results".

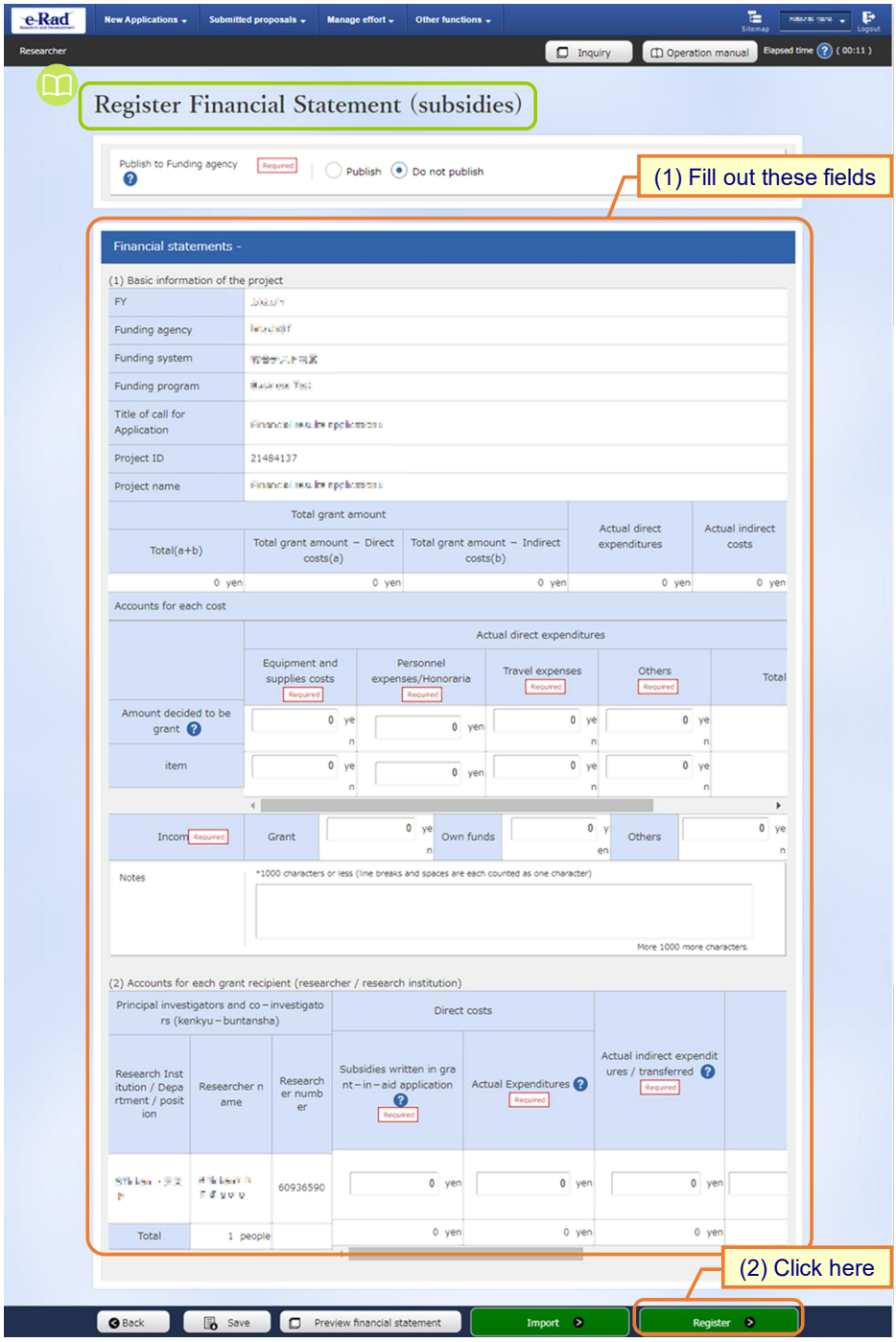
Note Registering new results

- The “New” button is displayed when the Funding agency has completed setting the submission conditions for financial results. In addition, even if the submission condition settings have been completed, it will not be displayed if submission is not required.

(4) Enter your financial results

(a) For grants

The [Register Financial Statement (subsidies)] screen is displayed.



(1) Input the details.

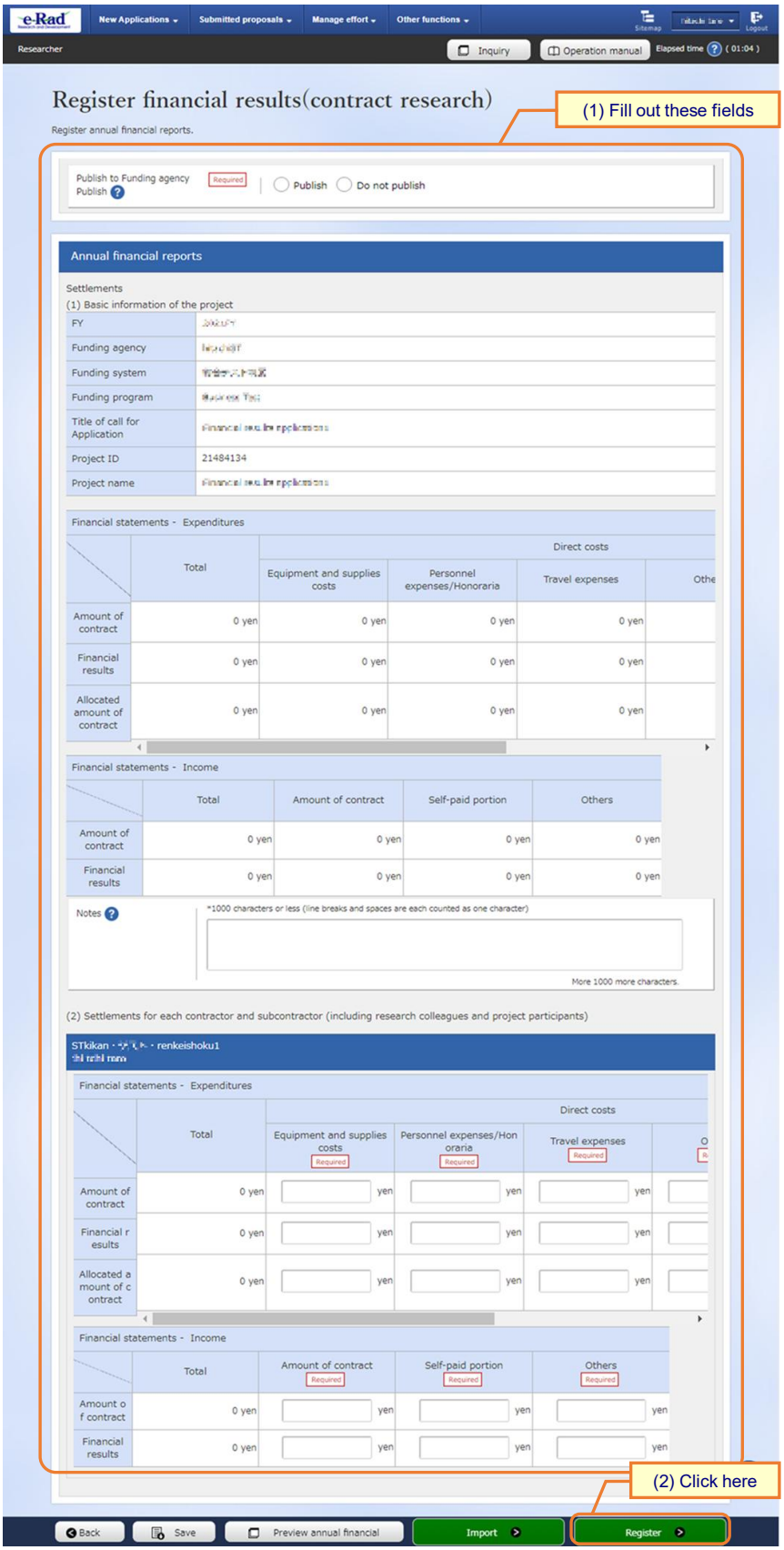
(2) Click the "Register" button.

Note | Subsidies/Contract research

- The items to be filled out in the financial results differ depending on whether the funding for the project is subsidies or contract research.

(b) For contract research

The [Register financial results (contract research)] screen is displayed.



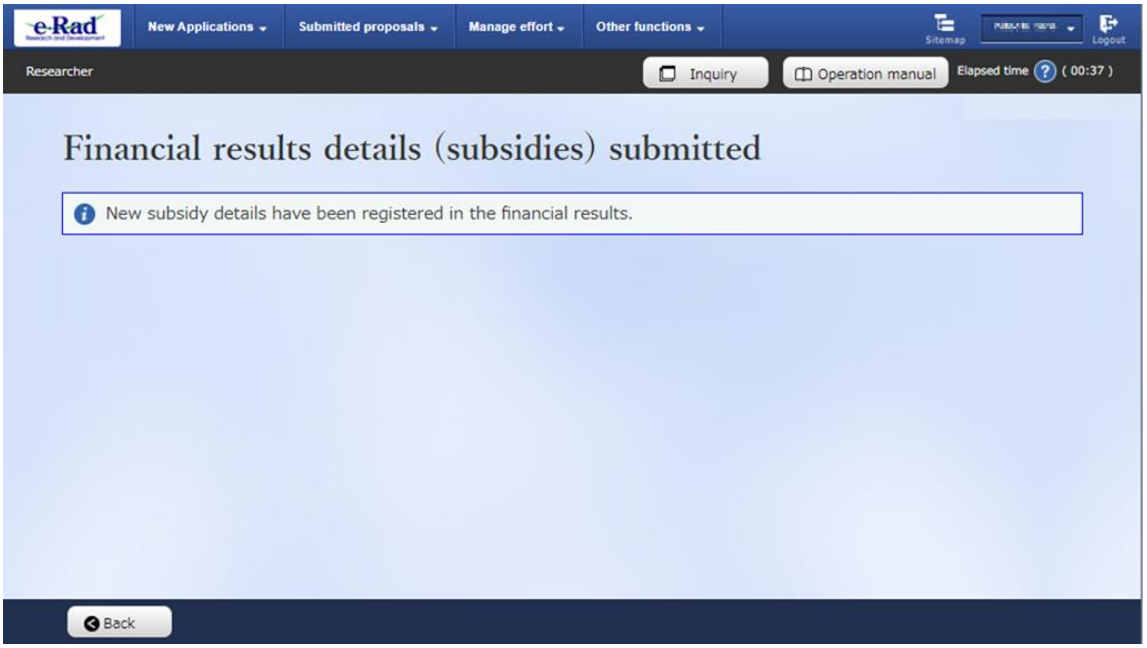
(1) Input the details.

(2) Click the "Register" button.

(5) Your financial results have been submitted

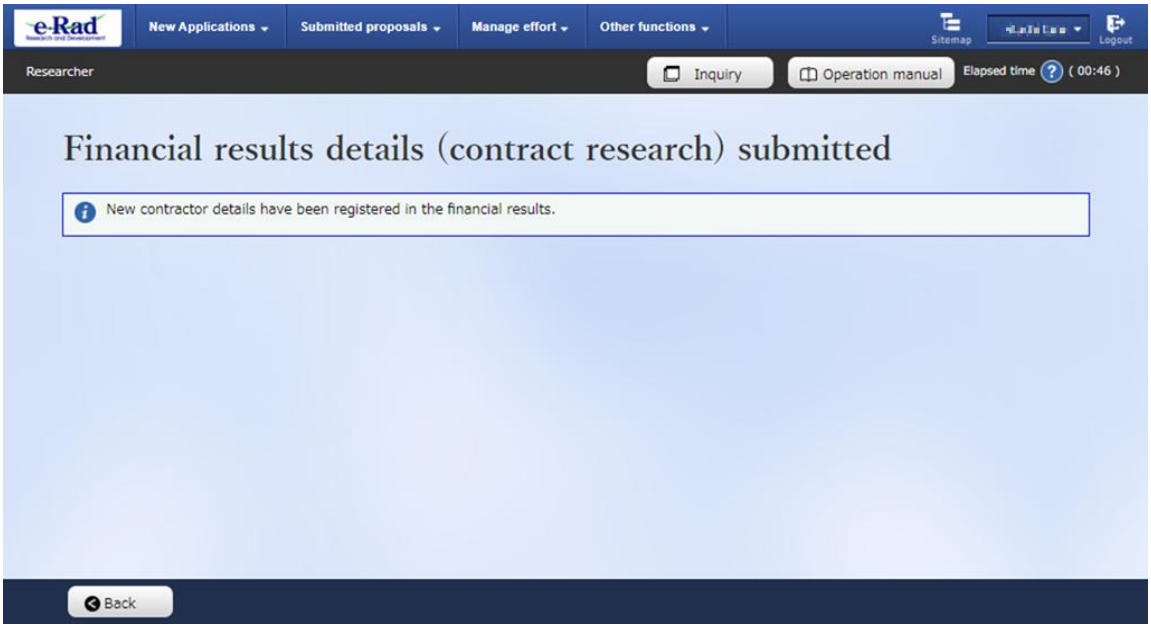
(a) For subsidies

The [Financial results details (subsidies) submitted] screen is displayed.



(b) For contract research

The [Financial results details (contract research) submitted] screen is displayed.

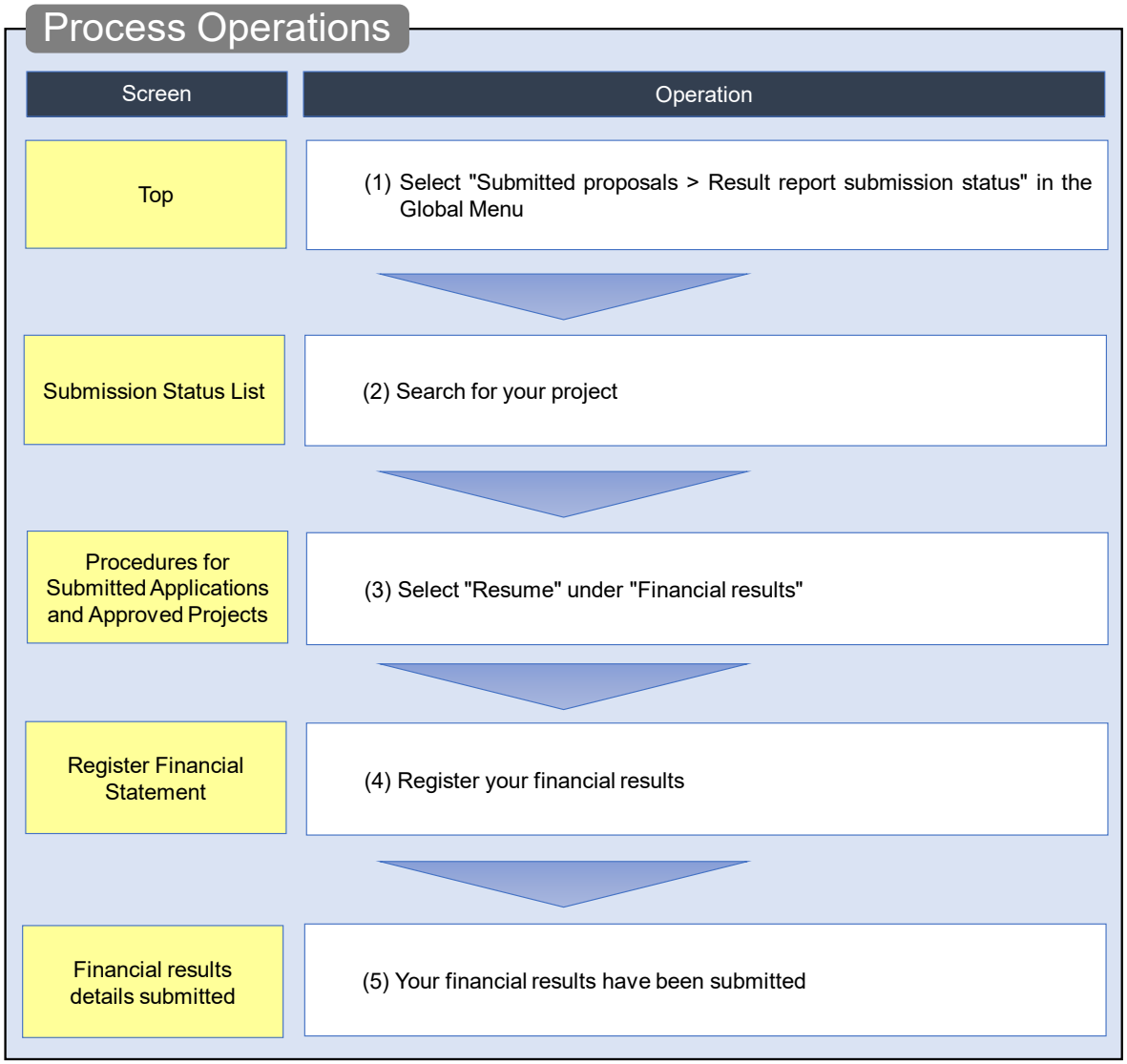


Your registered financial results are submitted to your research institution. Once approved by the research institution's representative, it will be submitted to the Funding agency.

This completes the procedure for submitting a financial results report.

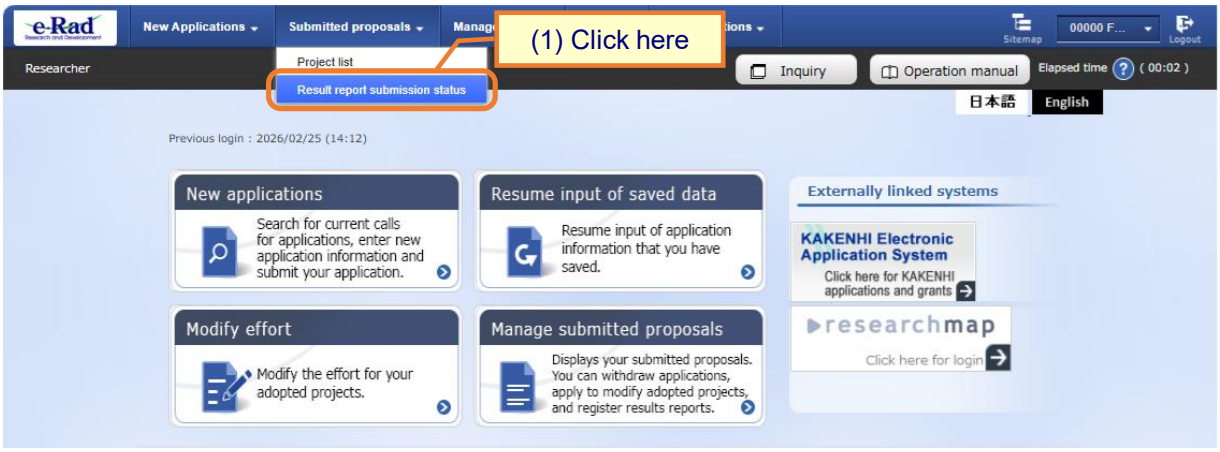
5.2 Resuming Saved Input

This section explains how to register financial results based on input details that you have saved or details created by the administrative manager.



Instructions

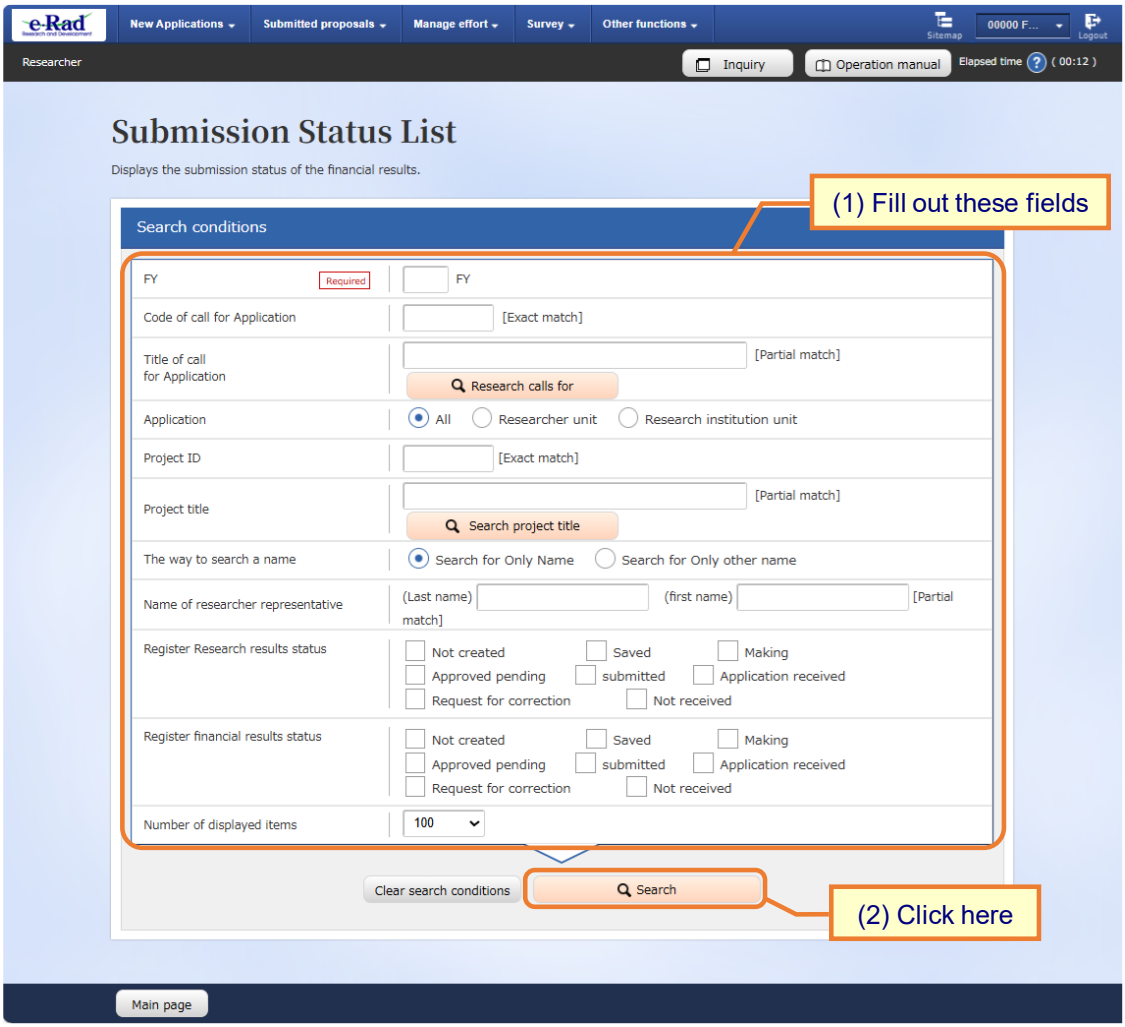
(1) Selection in the Global Menu



(1) Click "Submitted proposals > Result report submission status" in the Global Menu on the top screen.

(2) Search for your project

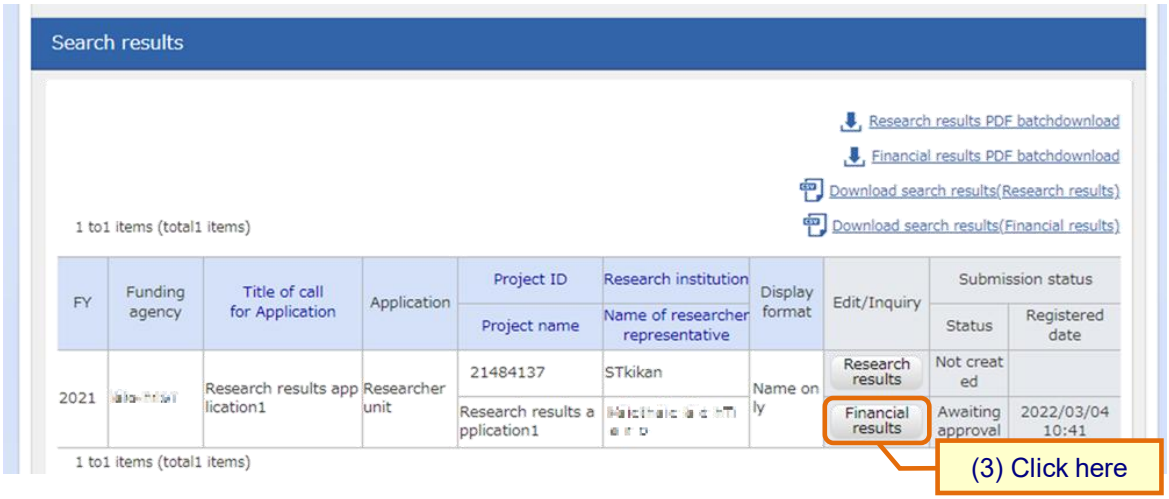
The [Submission Status List] screen is displayed.



(1) Input search terms. Input of year is required.

(2) Click the "Search" button.

The search results are displayed.



(3) Click the "Financial results" button under "Edit/Inquiry".

See "5.1 Creating New Financial Results (2) Search for your project" for details on "Financial results PDF batchdownload" and "Download search results (Financial results)".

(3) Select "Resume" under "Financial results"

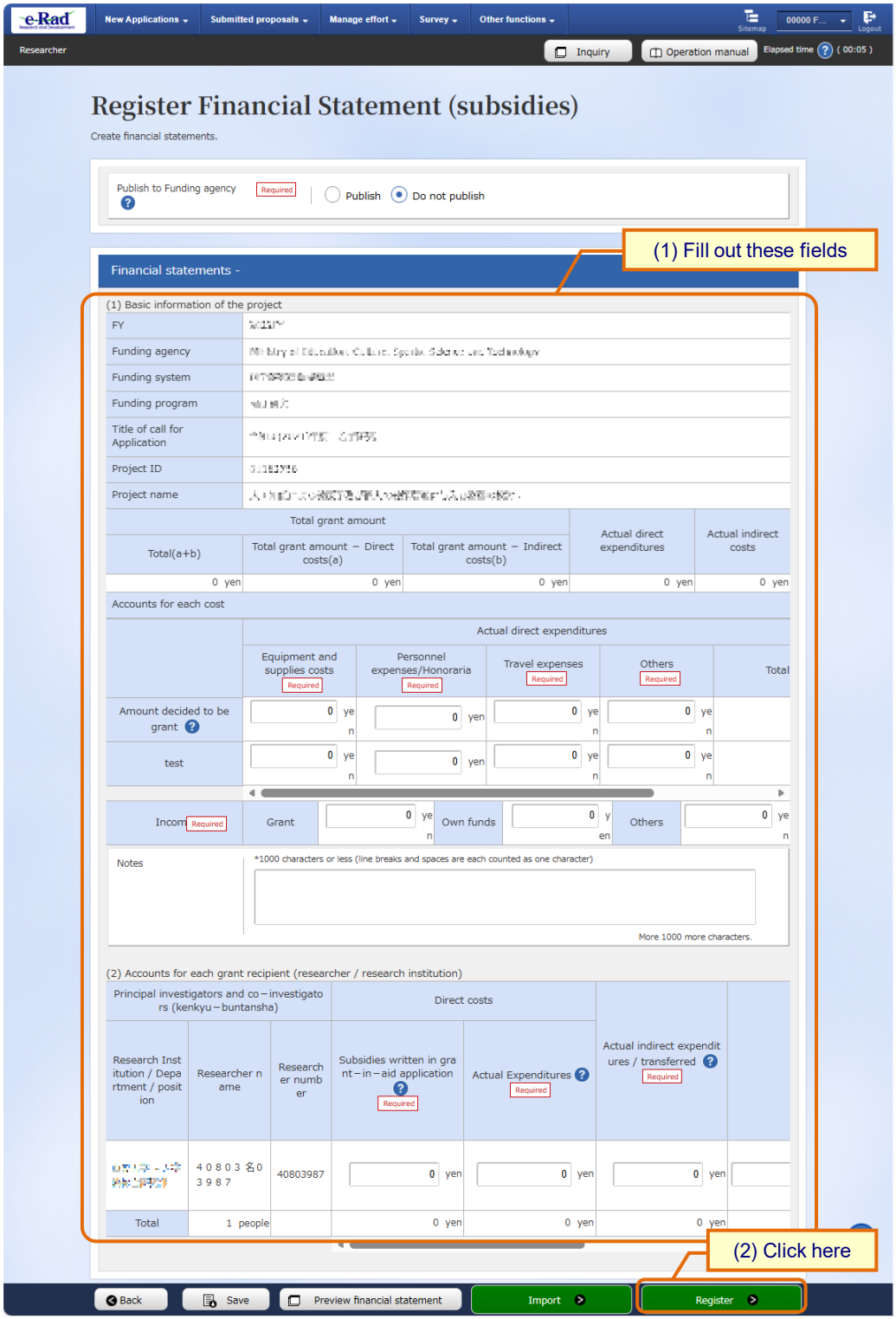
The [Procedures for Submitted Applications and Approved Projects] screen is displayed.

(1) Click the "Resume" button of the financial results.

(4) Enter your financial results

(a) For subsidies

The [Register Financial Statement (subsidies)] screen is displayed.



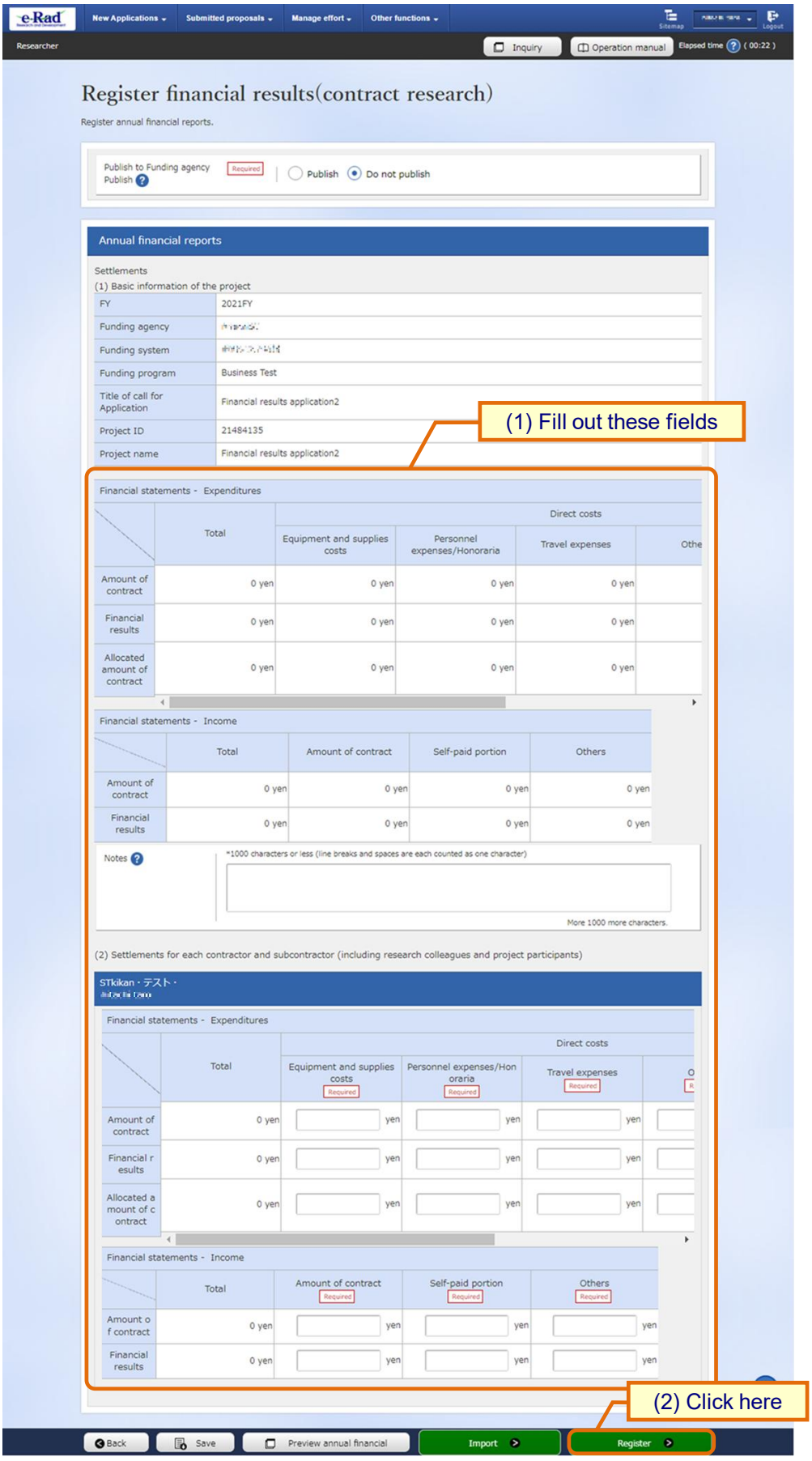
(1) Enter the details.

(2) Click the "Register" button.

The rest of this process is the same as "(4) Enter your financial results" of "5.1 Creating New Financial Results".

(b) For contract research

The [Register financial results (contract research)] screen is displayed.



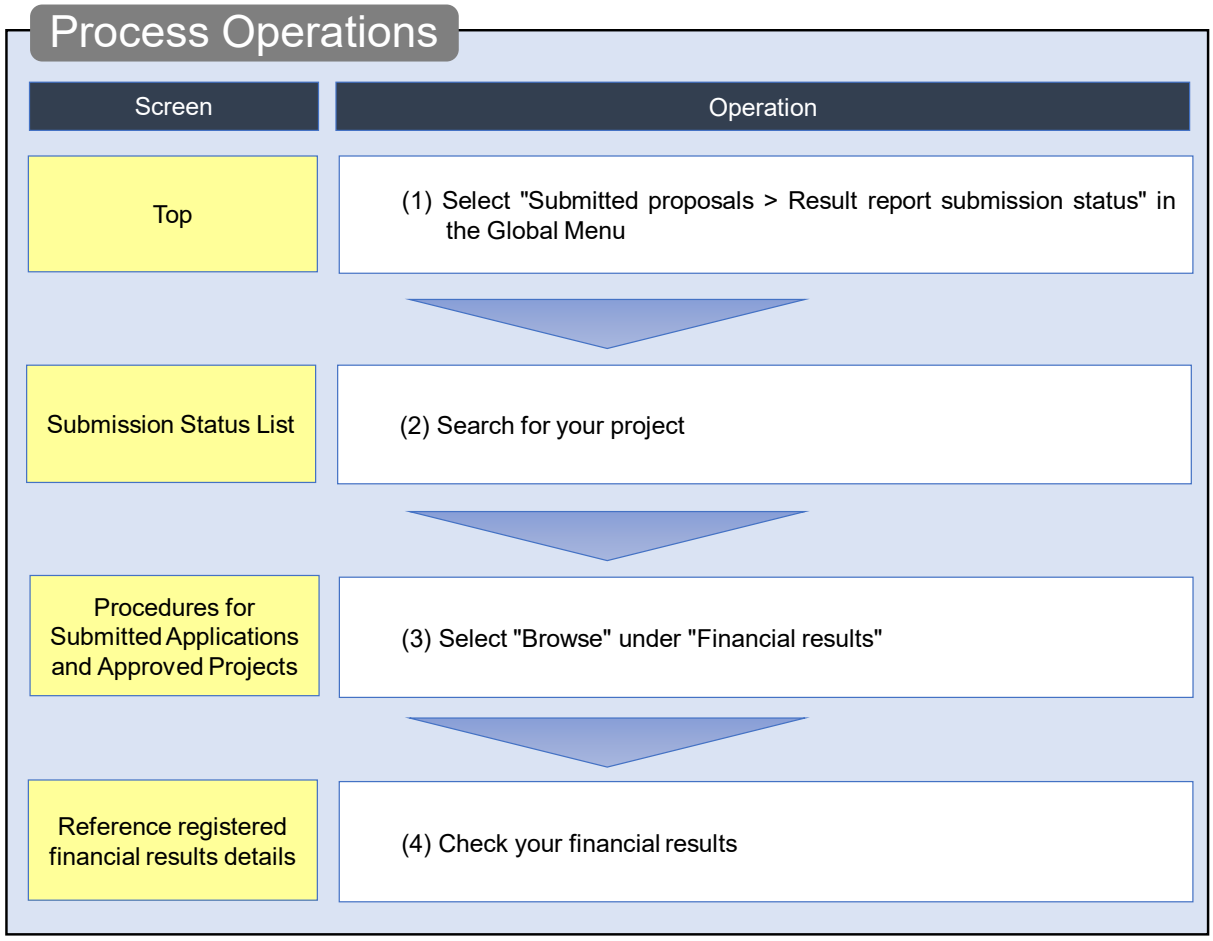
(1) Enter the details.

(2) Click the "Register" button.

The rest of this process is the same as "(4) Enter your financial results" of "5.1 Creating New Financial Results".

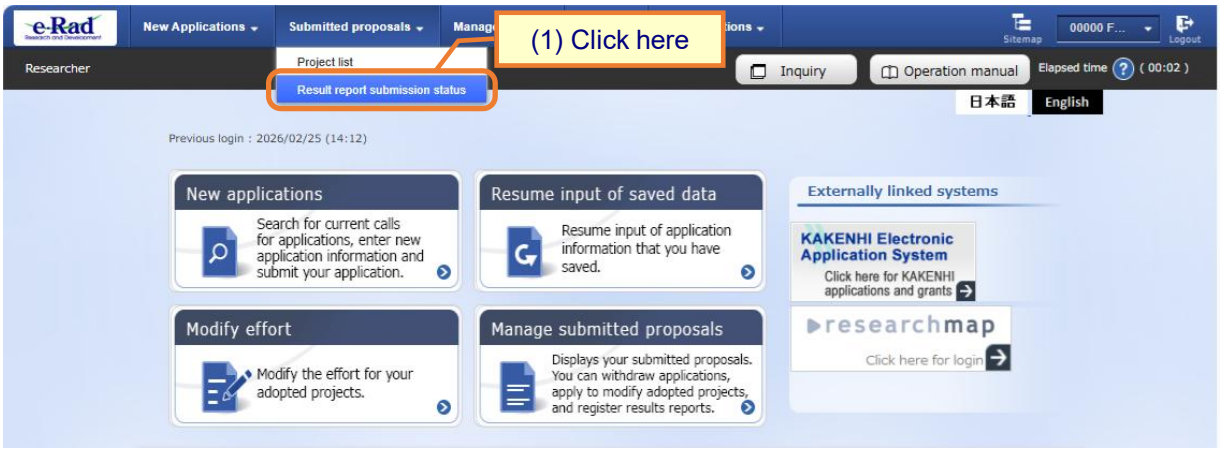
5.3 Checking Registered Details

This section explains how to check the details of financial results after they are registered.



Instructions

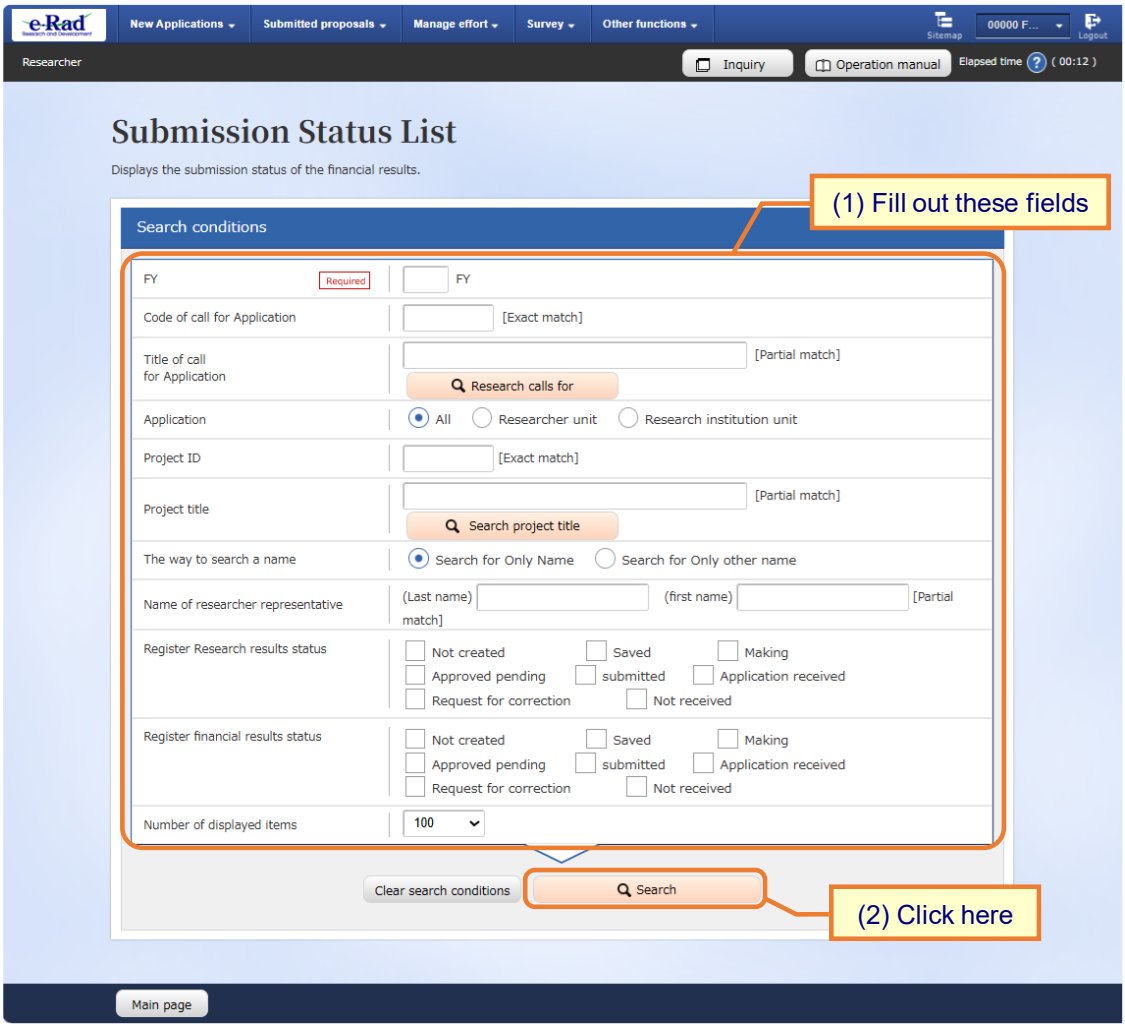
(1) Selection in the Global Menu



(1) Click "Submitted proposals > Result report submission status" in the Global Menu on the top screen.

(2) Search for your project

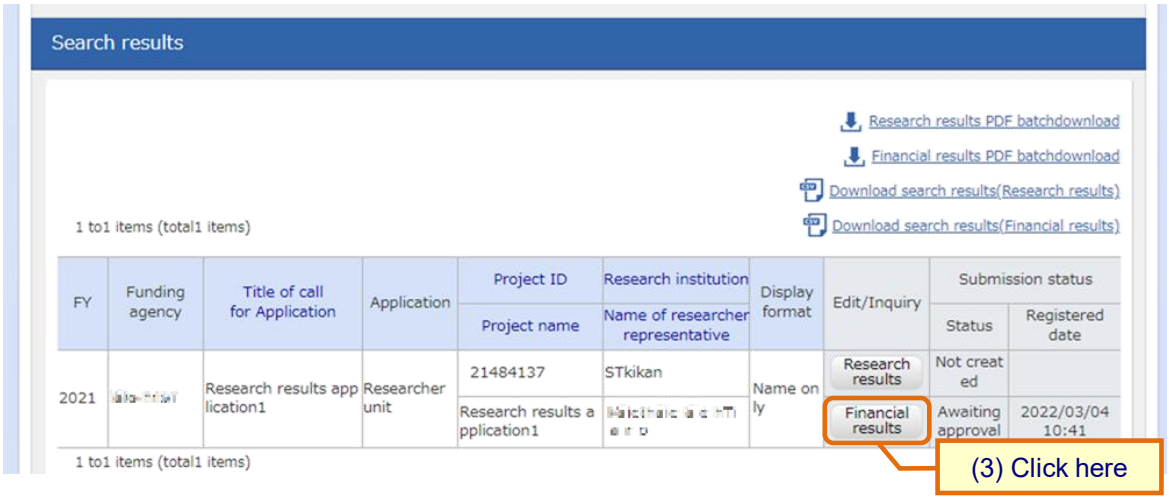
The [Submission Status List] screen is displayed.



(1) Input search terms. Input of year is required.

(2) Click the "Search" button.

The search results are displayed.



(3) Click the "Financial results" button under "Edit/Inquiry".

See "5.1 Creating New Financial Results (2) Search for your project" for details on "Financial results PDF batchdownload" and "Download search results (Financial results)".

(3) Select "Browse" under "Financial results"

The [Procedures for Submitted Applications and Approved Projects] screen is displayed.

(1) Click the "Browse" button under "Financial results".

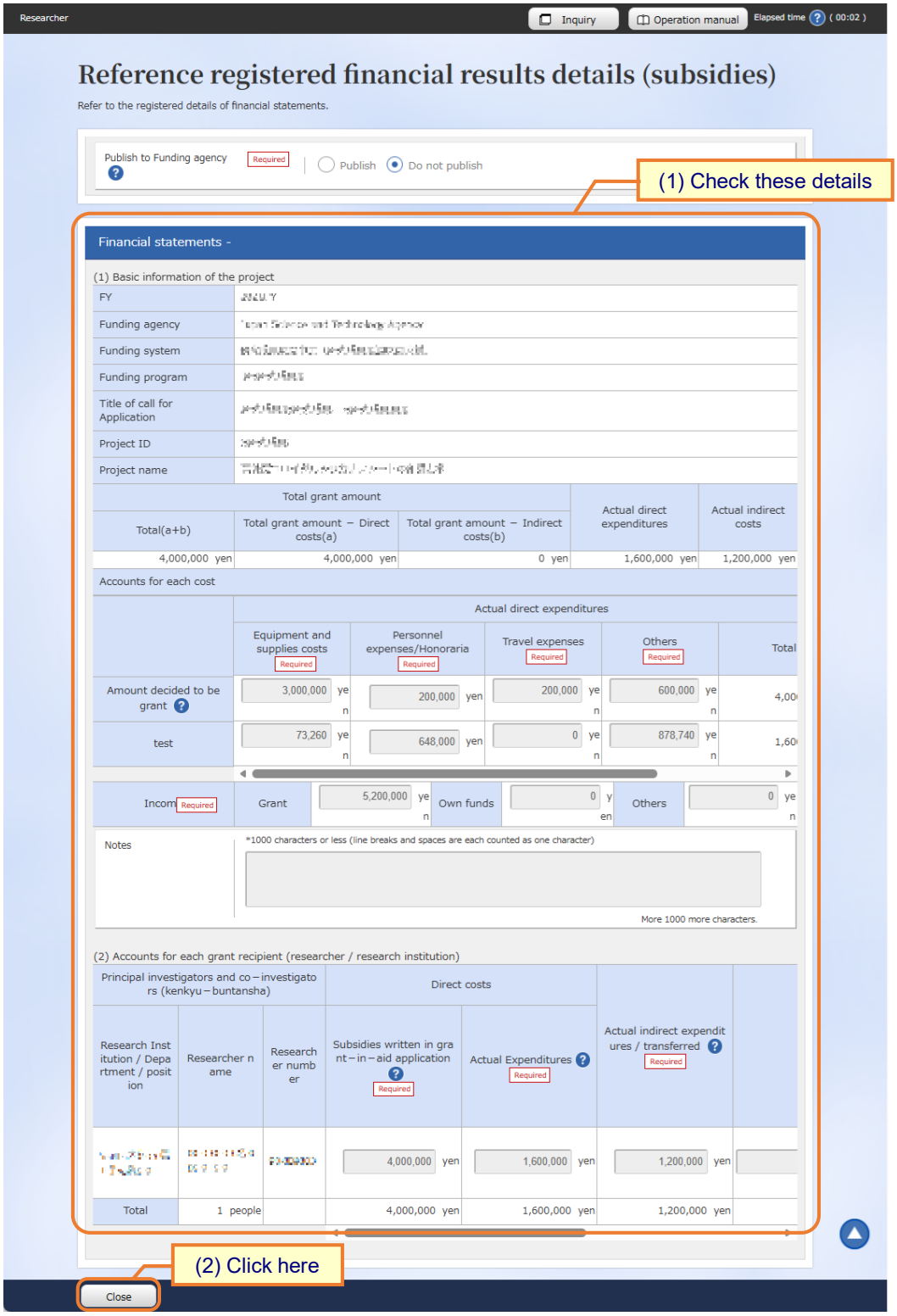
Caution Possible range of browse

If the research sharer is not authorized to edit and browse, the button will not be displayed until the financial results are registered.

(4) Check Financial Results

(a) For subsidies

The [Reference registered financial results details (subsidies)] screen is displayed.

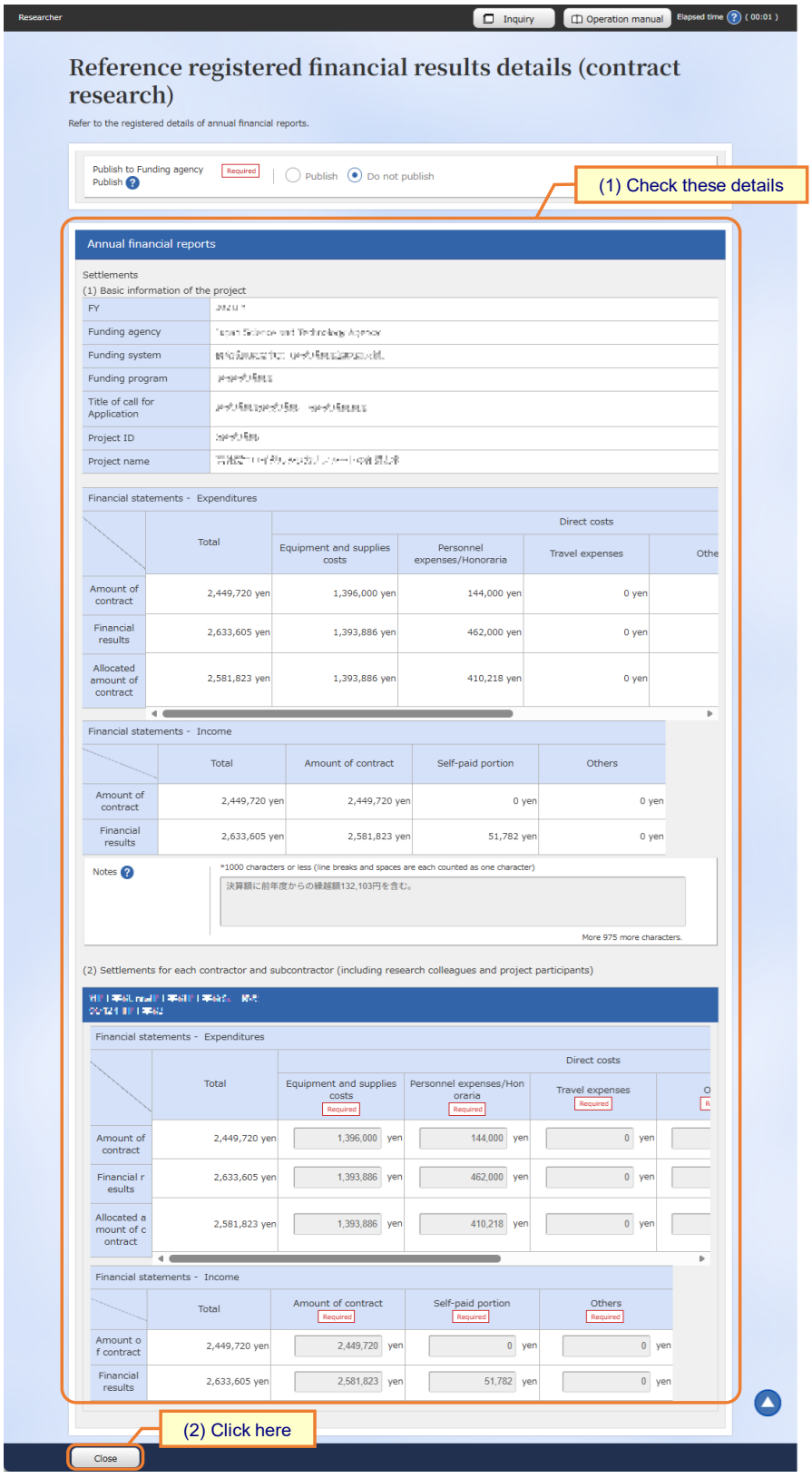


(1) Check the details.

(2) Click the "Close" button to close the window.

(b) For contract research

The [Reference registered financial results details (contract research)] screen is displayed.



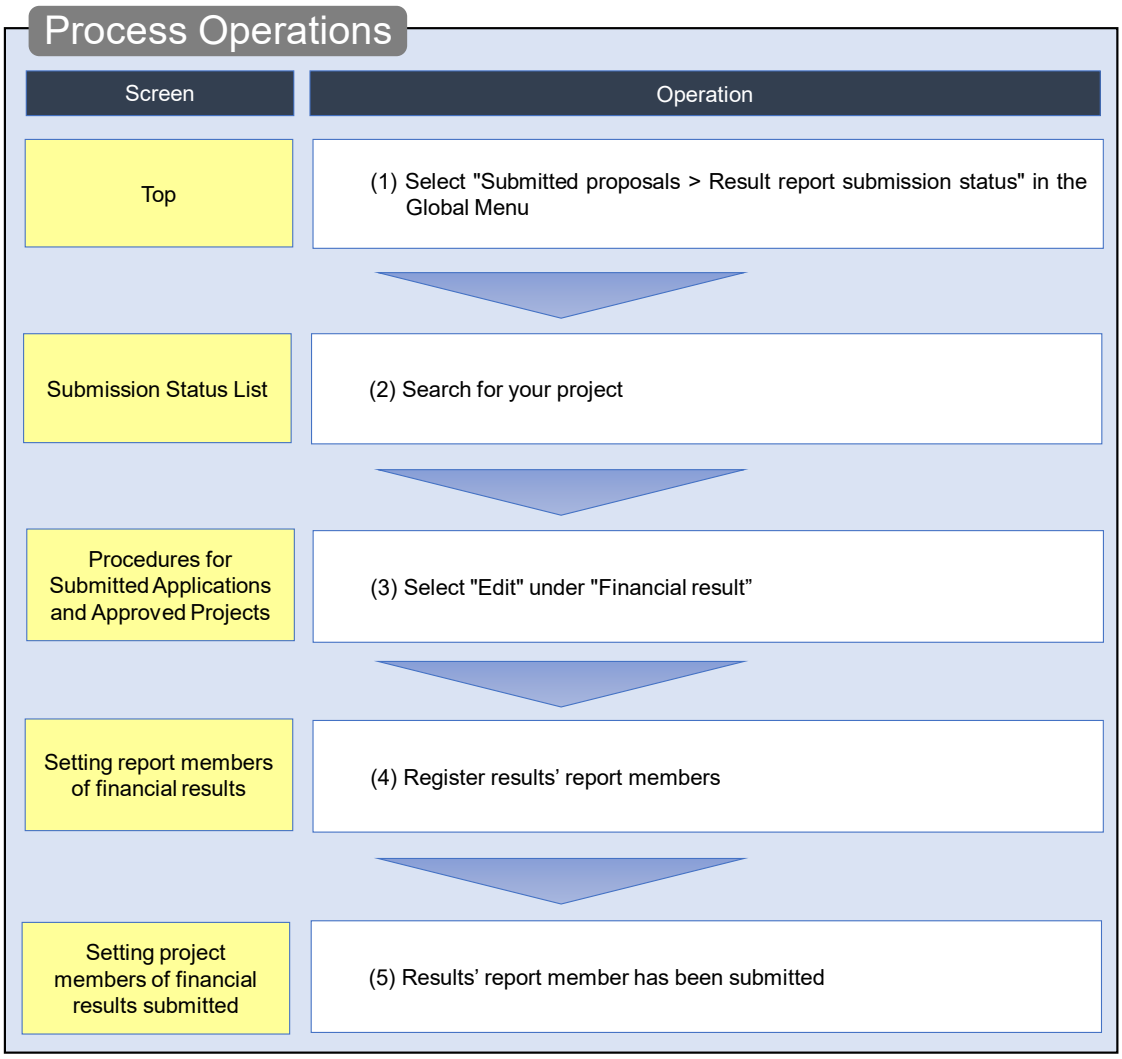
(1) Check the details.

(2) Click the "Close" button to close the window.

This completes the procedure for financial results reference.

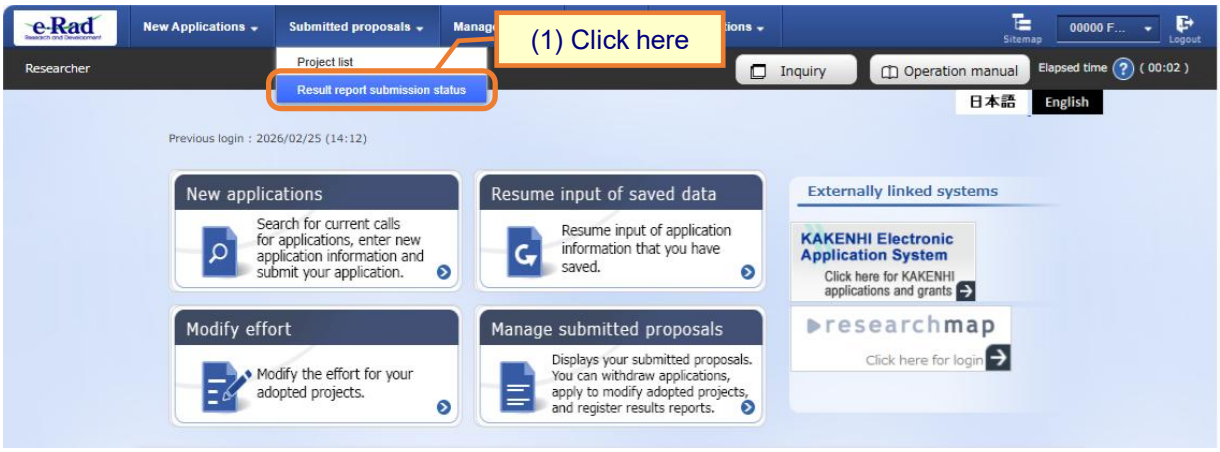
5.4 Registering The Report Members

This section explains how to register the results' report members and set the right of viewing/editing.



Instructions

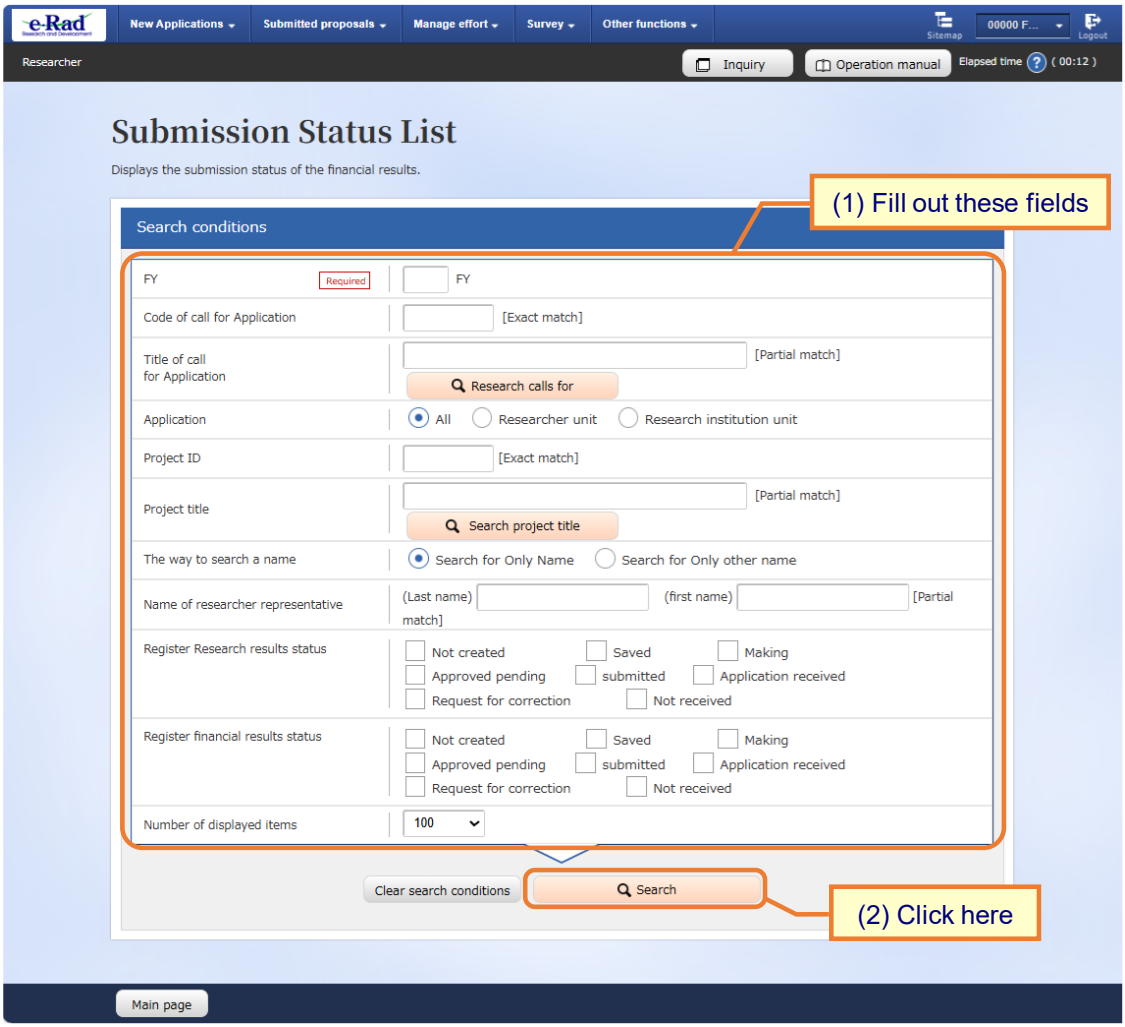
(1) Selection in the Global Menu



(1) Click "Submitted proposals > Result report submission status" in the Global Menu on the top screen.

(2) Search for your project

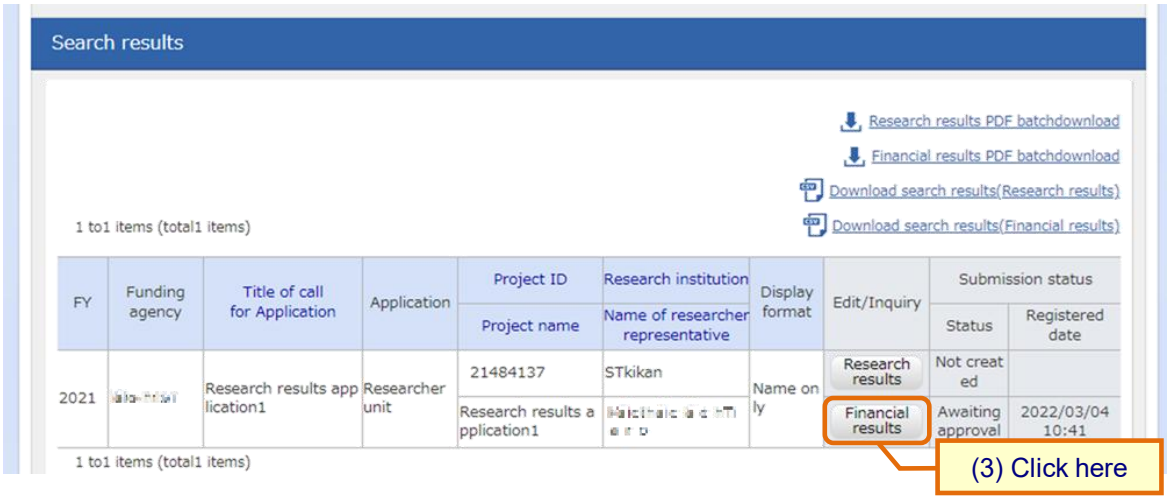
The [Submission Status List] screen is displayed.



(1) Input search terms. Input of year is required.

(2) Click the "Search" button.

The search results are displayed.



(3) Click the "Financial results" button under "Edit/Inquiry".

See "5.1 Creating New Financial Results (2) Search for your project" for details on "Financial results PDF batchdownload" and "Download search results (Financial results)".

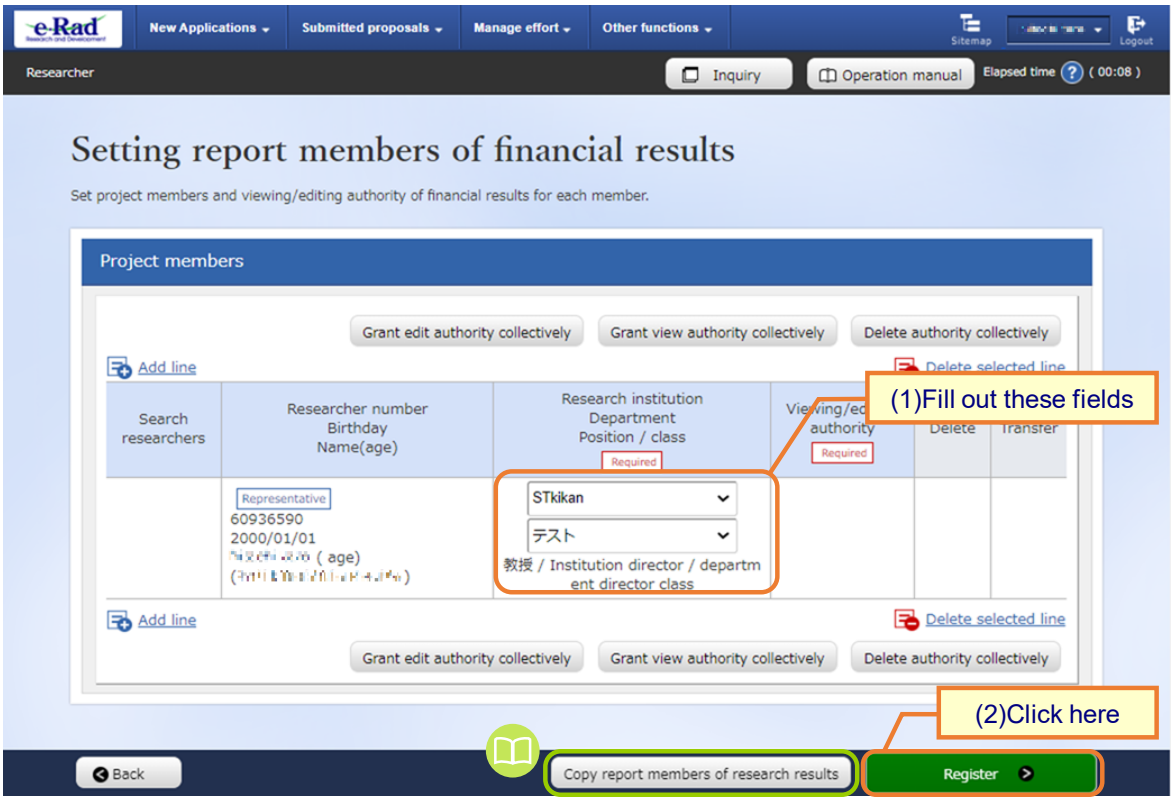
(3) Select "Edit" under "Financial results"

The [Procedures for Submitted Applications and Approved Projects] screen is displayed.

(1) Click the "Edit" button under "Financial results".

(4) Register results' report members

The [Setting report members of financial results] screen is displayed.



(1) Input reporters' information and the right of viewing, editing.

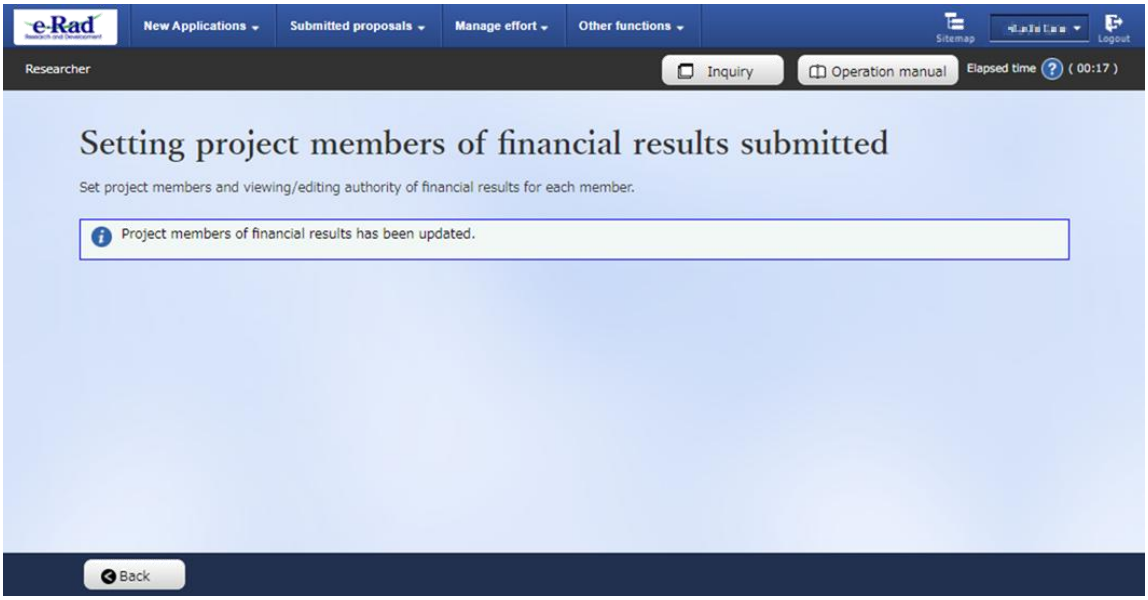
(2) Click the "Register" button.

Note Copy report members of research results

- You can copy information set by research results and about the right of viewing, editing.
- When the research results information and permission setting have been registered, the "Copy report members of research results" button is displayed.

(5) Results' report member has been submitted

The [Setting project members of financial results submitted] screen is displayed.



These changes about report members will not be reflected in information about research organizations that participates in the project.

If the information about research organizations that participates in the project have changes, applying for change is required.

See "2. Requests for Changes" for details on applying for change.

This completes the procedure for registering results' report members.

5.5 Pulling back Financial Results

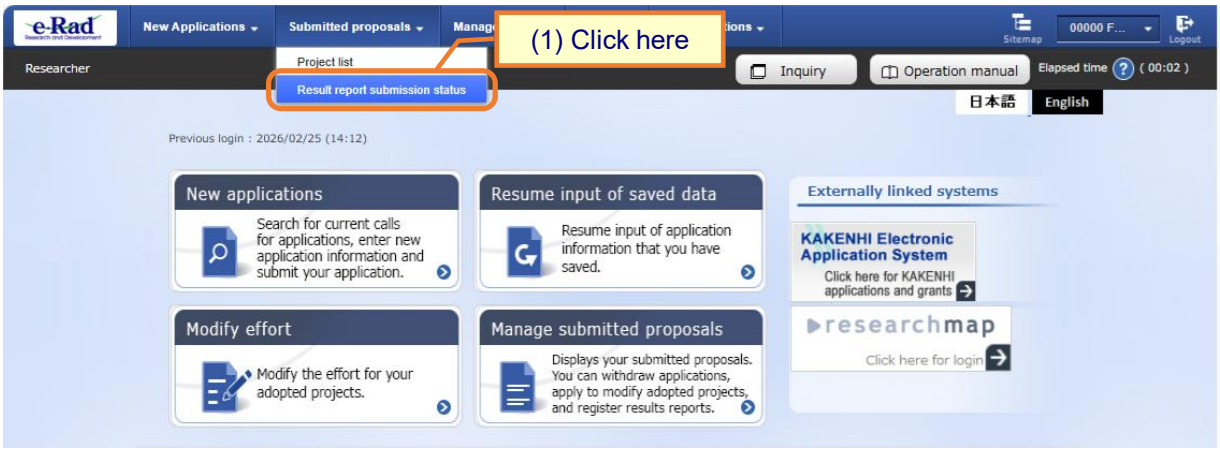
This section explains how to pull back registered financial results.

Process Operations

Screen	Operation
Top	(1) Select "Submitted proposal > Result report submission status" in the Global Menu
Submission Status List	(2) Search for your project
Procedures for Submitted Applications and Approved Projects	(3) Select "Pullback" under "Financial results"
Procedures for Submitted Applications and Approved Projects	(4) Your financial results have been pulled back

Instructions

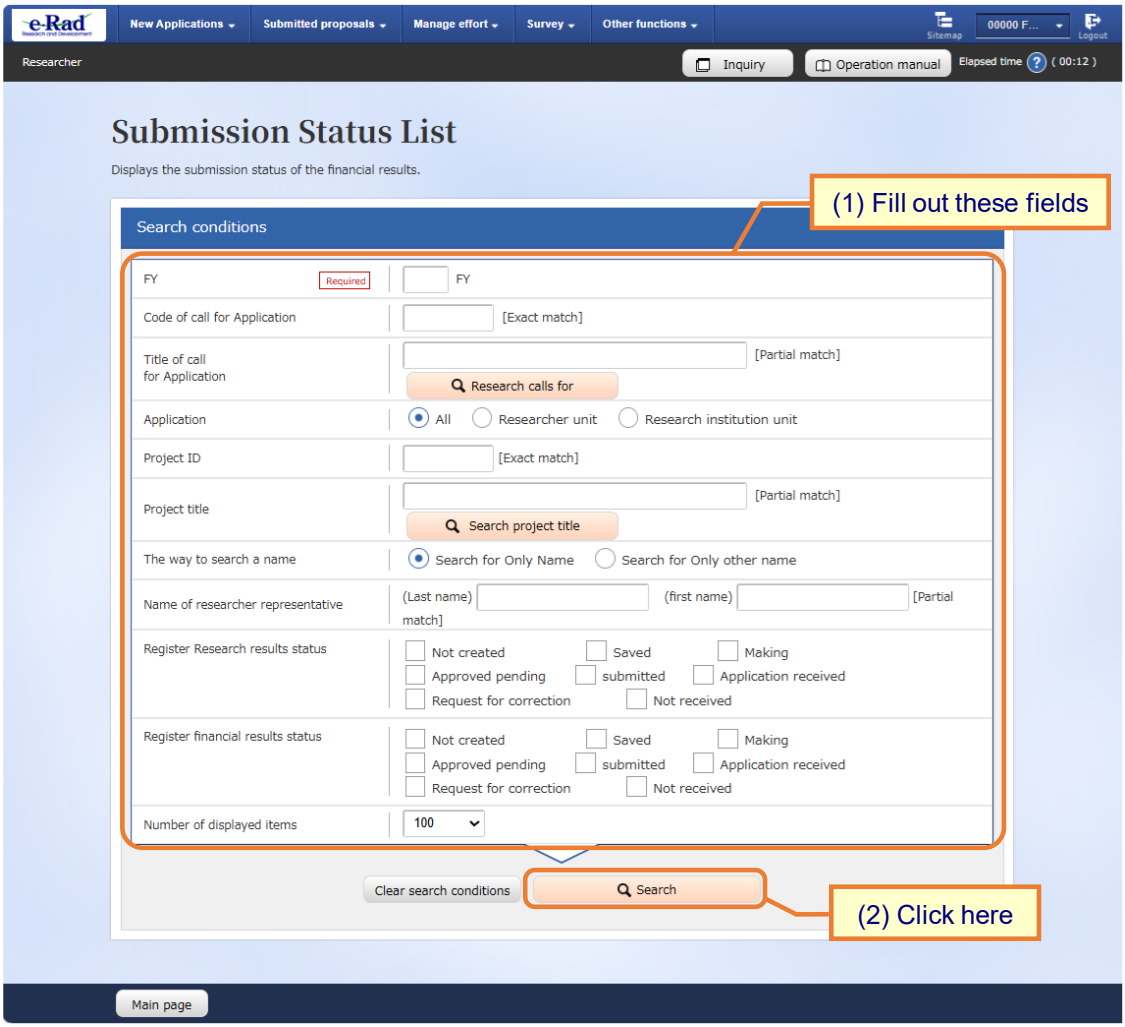
(1) Selection in the Global Menu



(1) Click "Submitted proposals > Result report submission status" in the Global Menu on the top screen.

(2) Search for your project

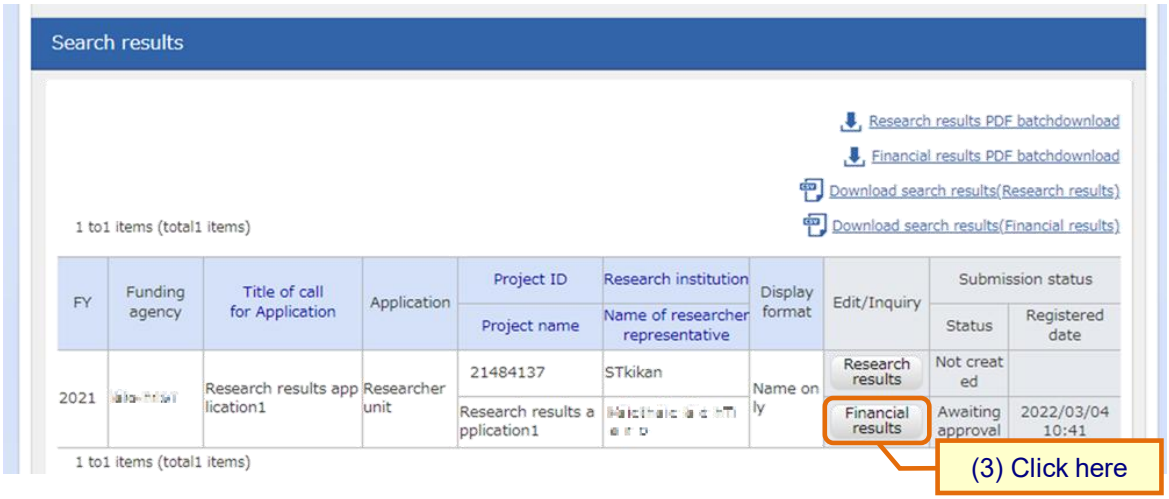
The [Submission Status List] screen is displayed.



(1) Input search terms. Input of year is required.

(2) Click the "Search" button.

The search results are displayed.



(3) Click the "Financial results" button under "Edit/Inquiry".

See "5.1 Creating New Financial Results (2) Search for your project" for details on "Financial results PDF batchdownload" and "Download search results (Financial results)".

(3) Select "Pullback" under "Financial results"

The [Procedures for Submitted Applications and Approved Projects] screen is displayed.

(1) Click the "Pullback" button.

Caution Possible range of pullback

- If approval of the research representative's institution is required (researcher → research institution → Funding agency), only the financial results before approval by the research institution can be pulled back.
- If approval of the research representative's institution is not required (researcher →Funding agency), only the financial results before accepted by the allocation organization can be pulled back.

(4) Your financial results have been pulled back

The "Processing is complete" is displayed on the [Procedures for Submitted Applications and Approved Projects] screen.

This completes the procedure for pulling back financial results.

5.6 Deleting Financial Results

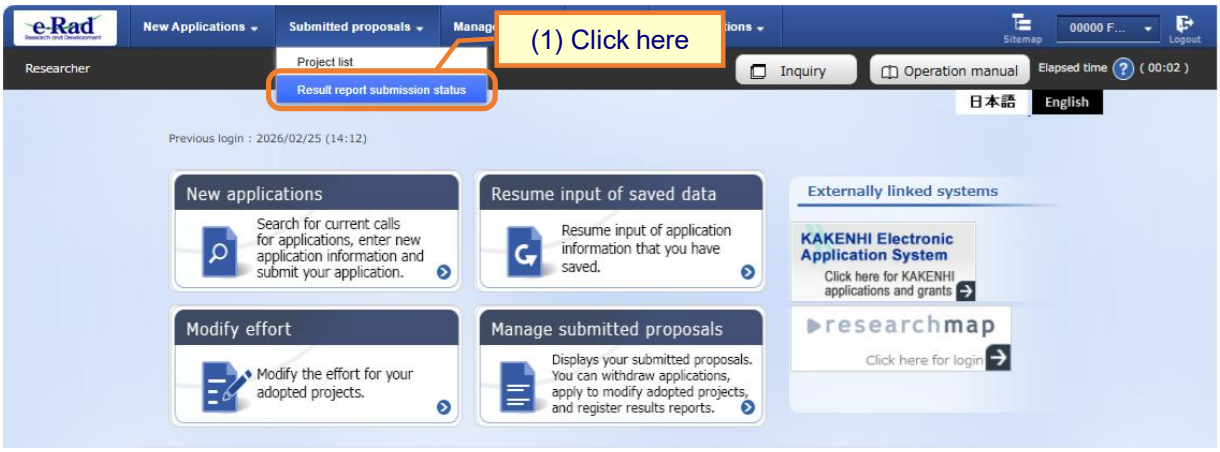
This section explains how to delete temporarily saved financial results.

Process Operations

Screen	Operation
Top	(1) Select "Submitted proposal > Result report submission status" in the Global Menu
Submission Status List	(2) Search for your project
Procedures for Submitted Applications and Approved Projects	(3) Select "Delete" under "Financial results"
Deletion of Financial Statement	(4) Check the deletion
Completed deletion of Financial Statement	(5) Your financial results have been deleted

Instructions

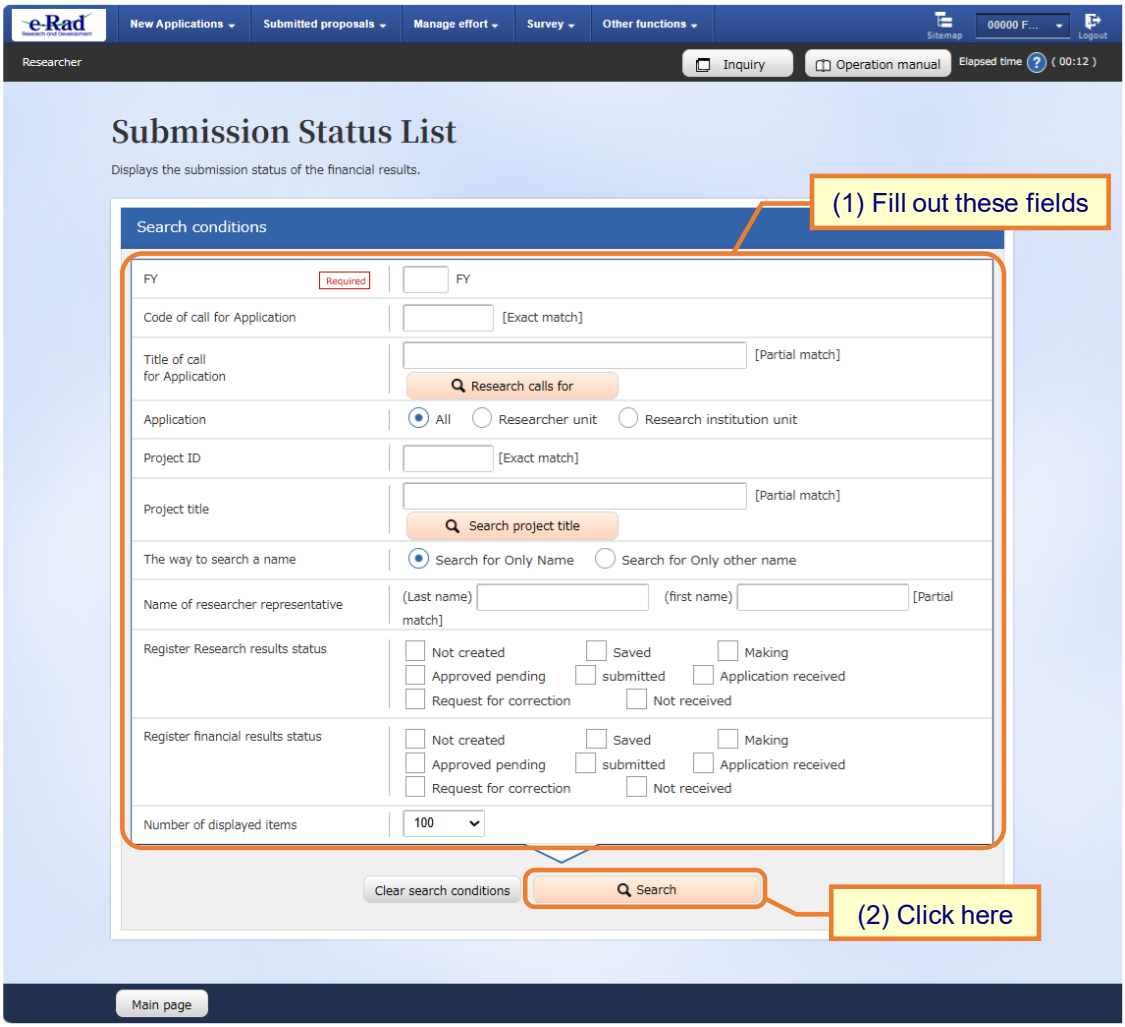
(1) Selection in the Global Menu



(1) Click "Submitted proposals > Result report submission status" in the Global Menu on the top screen.

(2) Search for your project

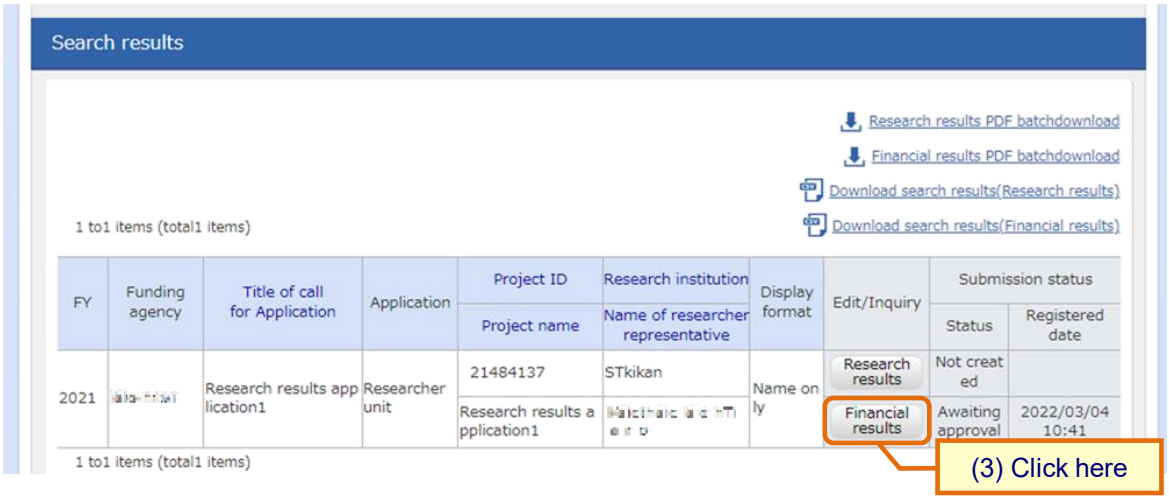
The [Submission Status List] screen is displayed.



(1) Input search terms. Input of year is required.

(2) Click the "Search" button.

The search results are displayed.



(3) Click the "Financial results" button under "Edit/Inquiry".

See "5.1 Creating New Financial Results (2) Search for your project" for details on "Financial results PDF batchdownload" and "Download search results (Financial results)".

(3) Select "Delete" under "Financial results"

The [Procedures for Submitted Applications and Approved Projects] screen is displayed.

(1) Click the "Delete" button under "Financial results".

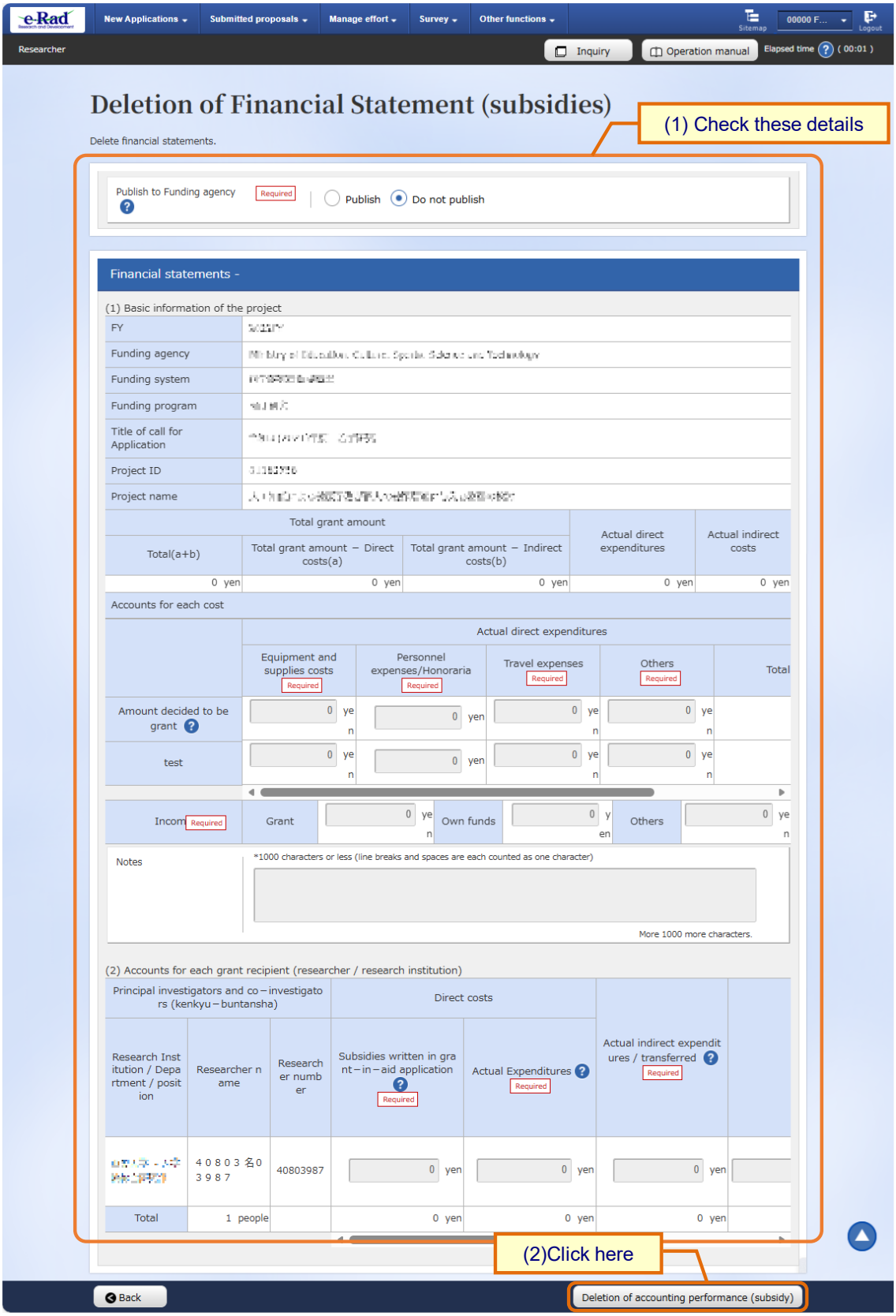
Caution Possible conditions of deletion

- ○ Temporarily saved financial results can be deleted.
- ○ Financial results pulled back and sent back from research institutions and Funding agency can be deleted.

The financial results with a correction request by the Funding agency cannot be deleted.

(4) Check the deletion

The [Deletion of Financial Statement] screen is displayed.



(1) Check the deletion.

(2) Click the "Deletion of accounting performance" button.

(5) Your financial results have been deleted

The [Completed deletion of Financial Statement] screen is displayed.

This completes the procedure for deleting financial results.

5.7 Importing Financial Results

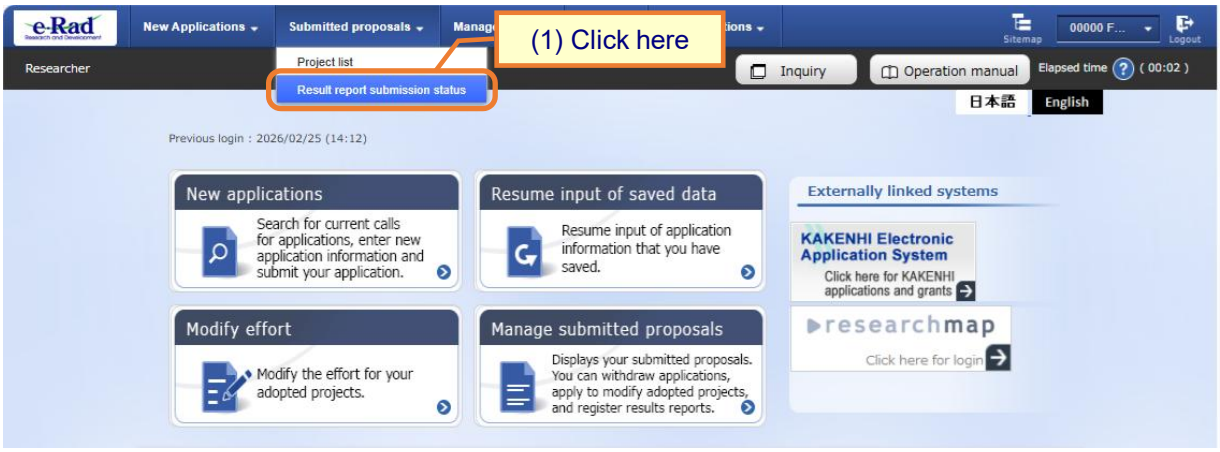
This section explains how to import financial results.

Process Operations

Screen	Operation
Top	(1) Select "Submitted proposals > Result report submission status" in the Global Menu
Submission Status List	(2) Search for your project
Procedures for Submitted Applications and Approved Projects	(3) Select "New" under "Financial results"
Register Financial Results	(4) Input your financial results
Import Instruction	(5) Import instruction
Complete registration of Import	(6) Your financial results have been submitted

Instructions

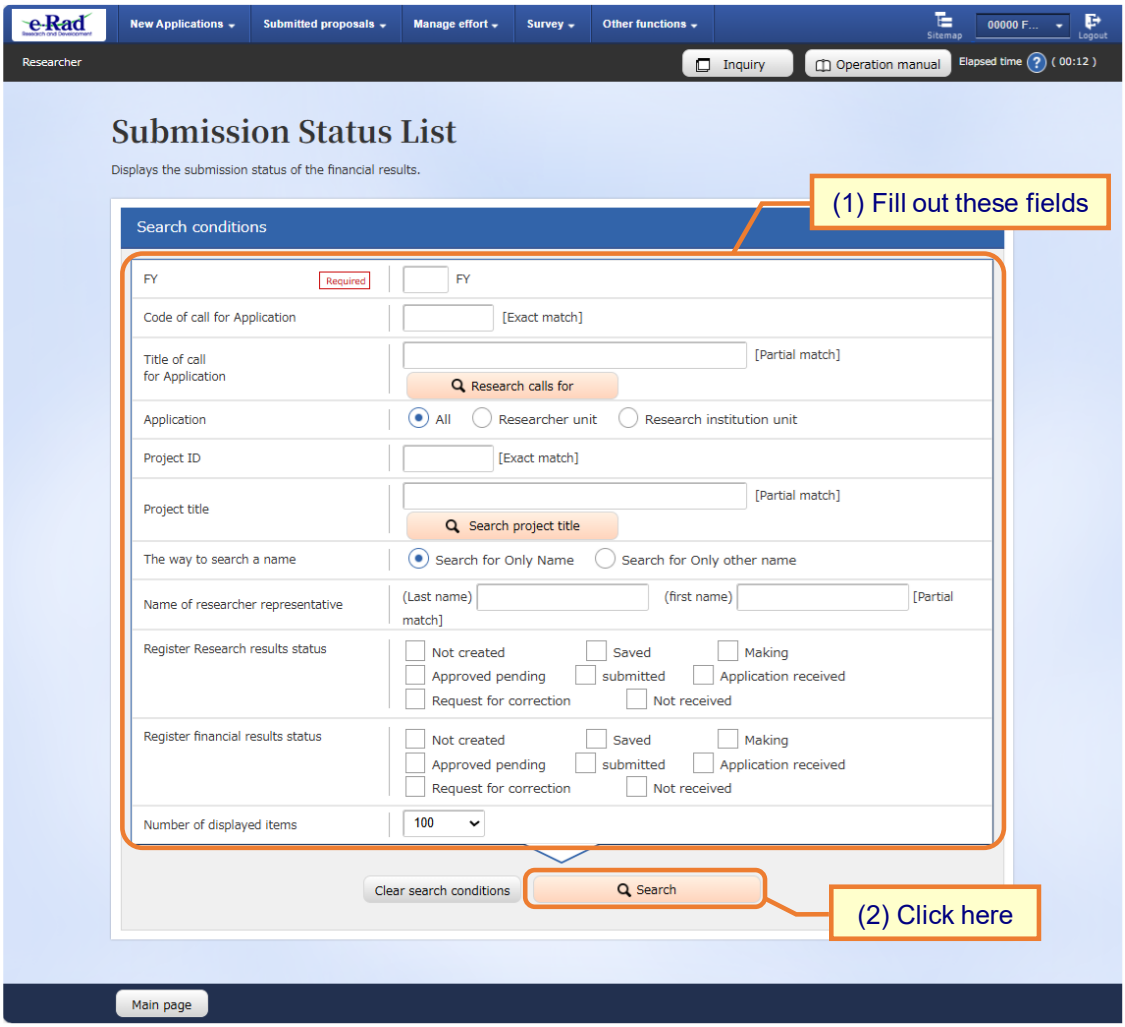
(1) Selection in the Global Menu



(1) Click "Submitted proposals > Result report submission status" in the Global Menu on the top screen.

(2) Search for your project

The [Submission Status List] screen is displayed.



(1) Input search terms. Input of year is required.

(2) Click the "Search" button.

(3) Select "New" under "Financial results"

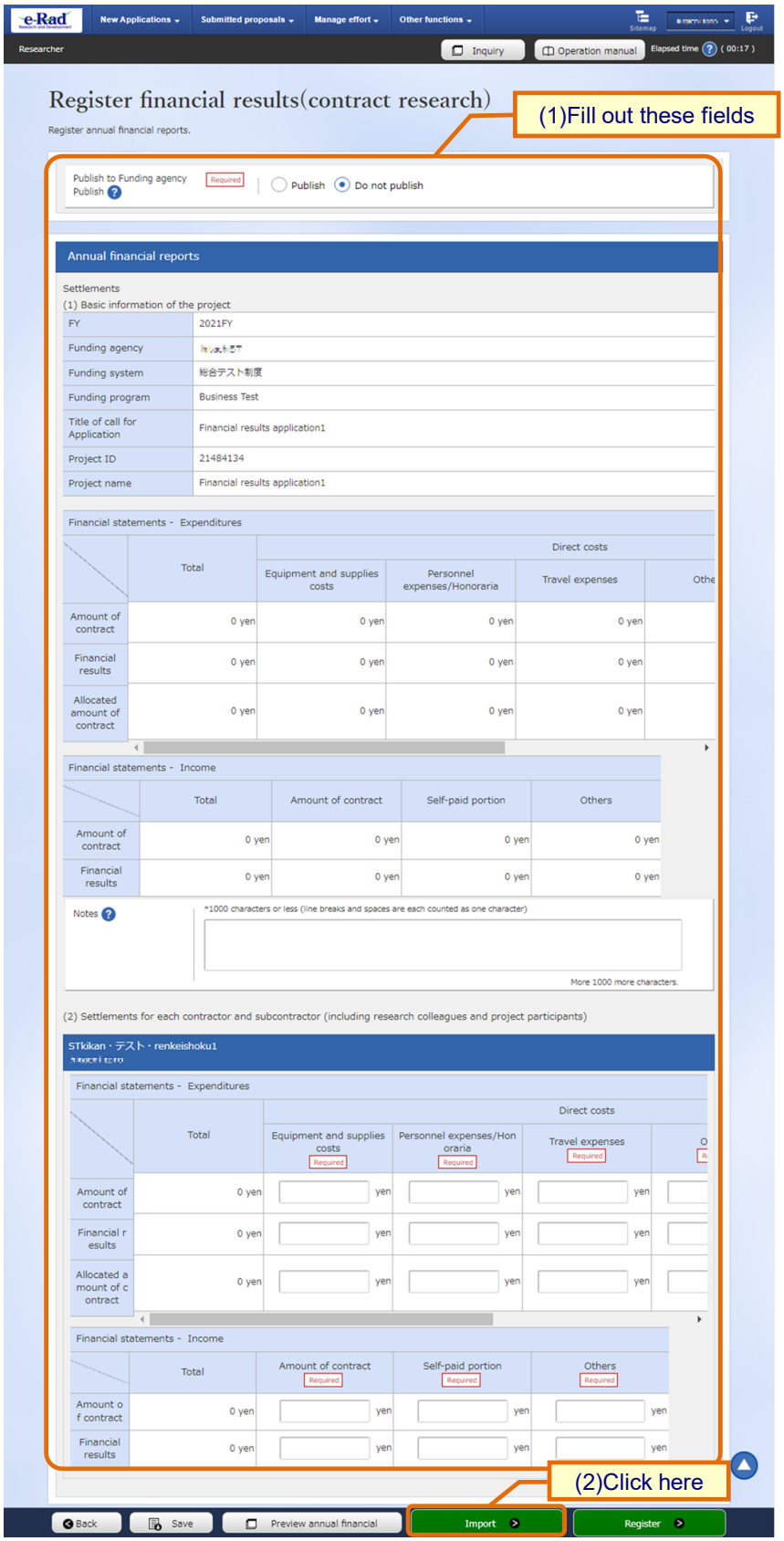
The search results are displayed on the [Submission Status List] screen.

(1) Click the "Financial results" button under "Edit/Inquiry".

(2) Click the "New" button under "Financial results".

(4) Input your financial results

The [Register financial results(contract research)] screen is displayed.

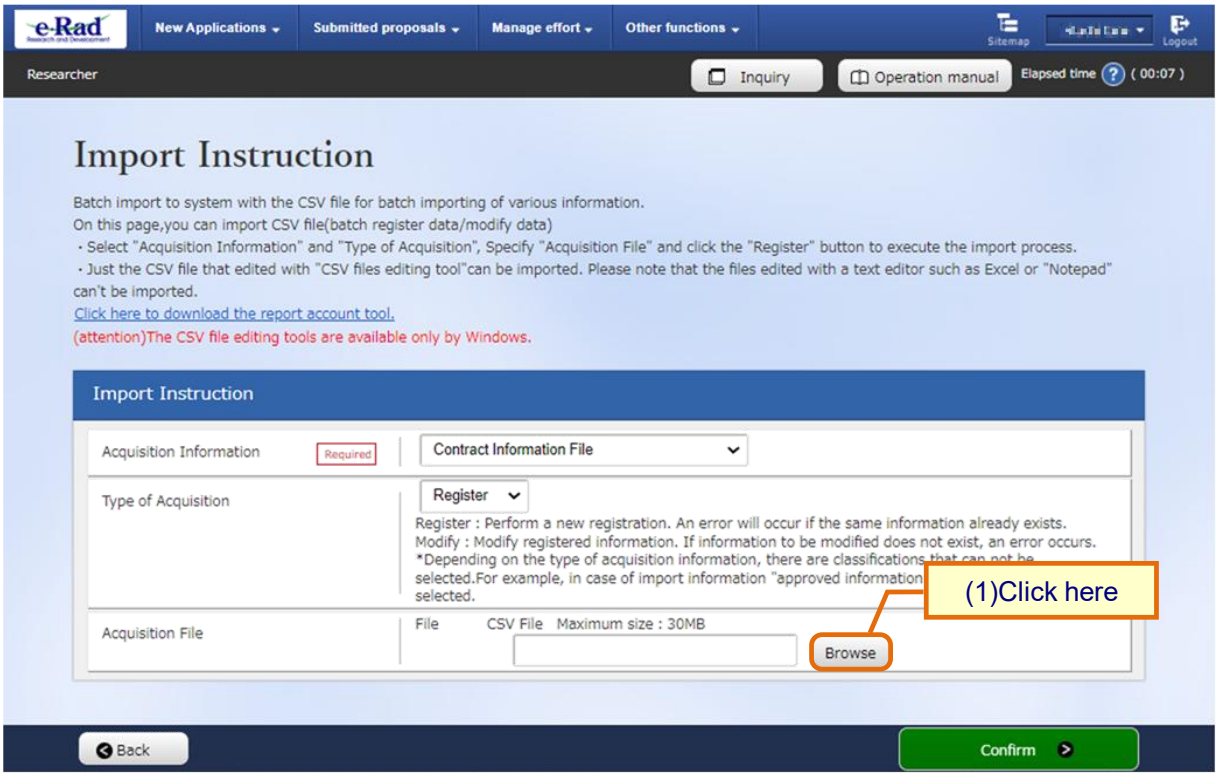


(1) Input your financial results.

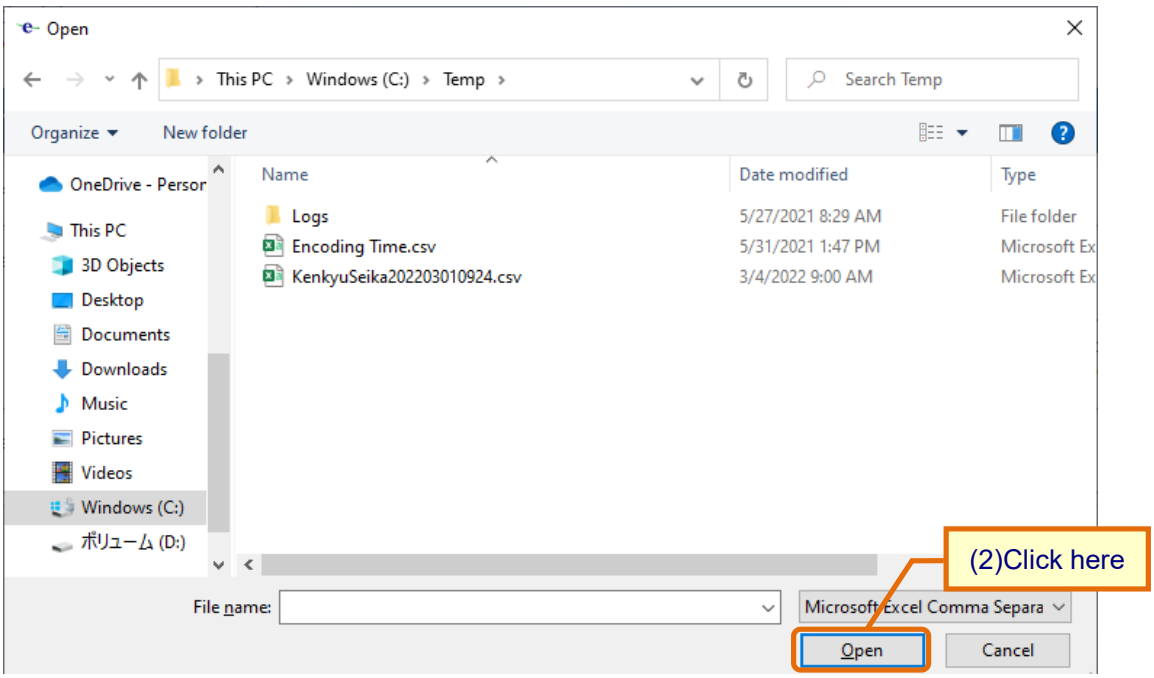
(2) Click the "Import" button.

(5) Import instruction

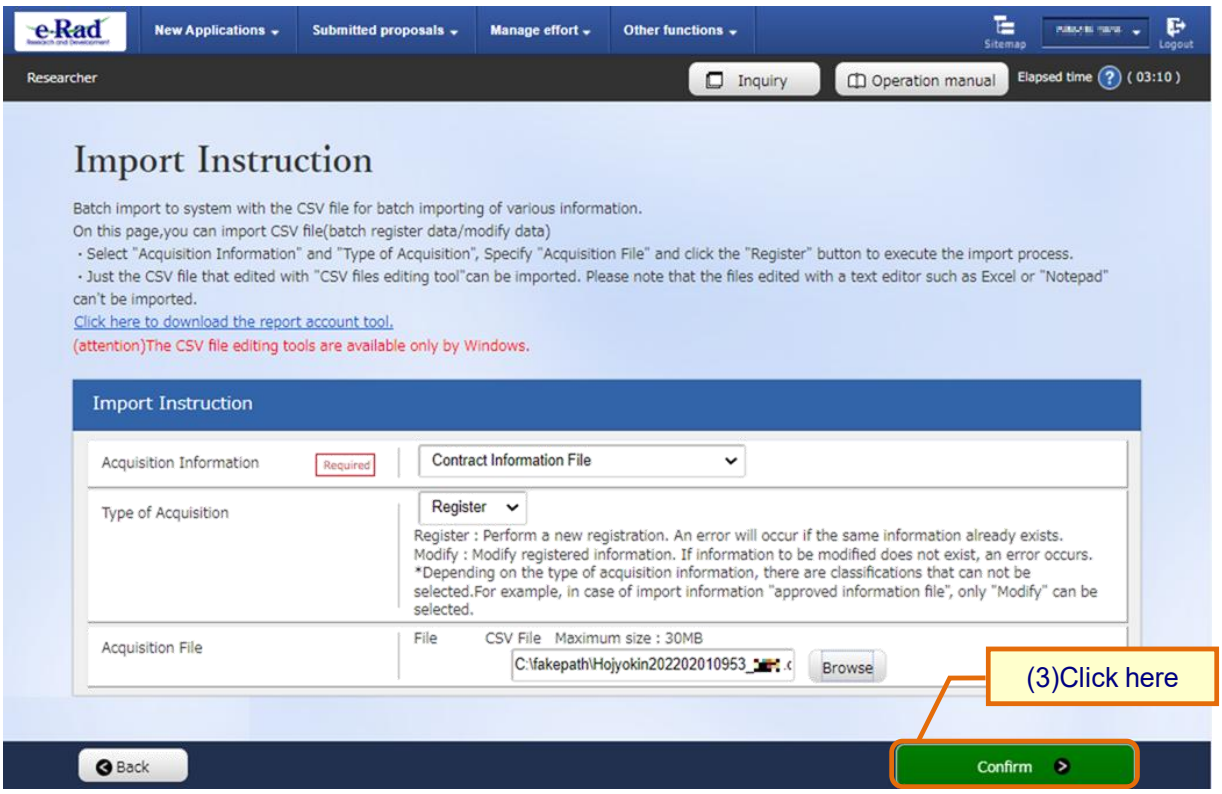
The [Import Instruction] screen is displayed.



(1) Click the "Browse" button.



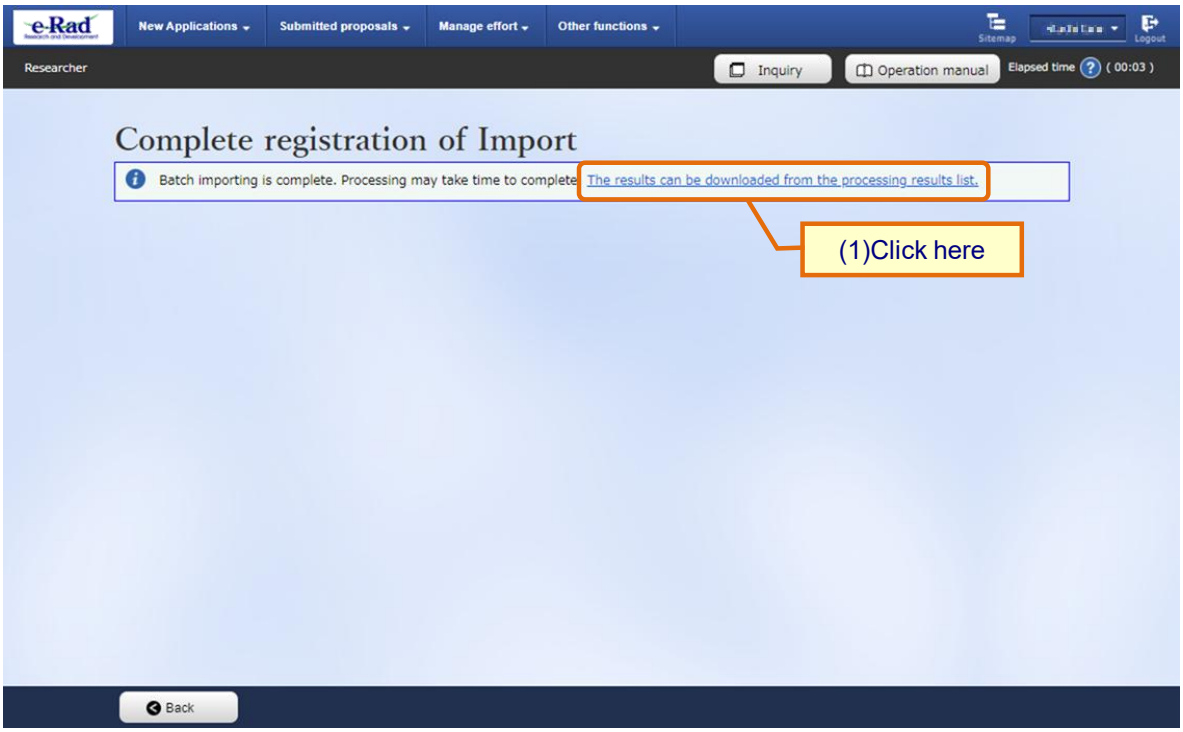
(2) Select the file to import and click the "Open" button.



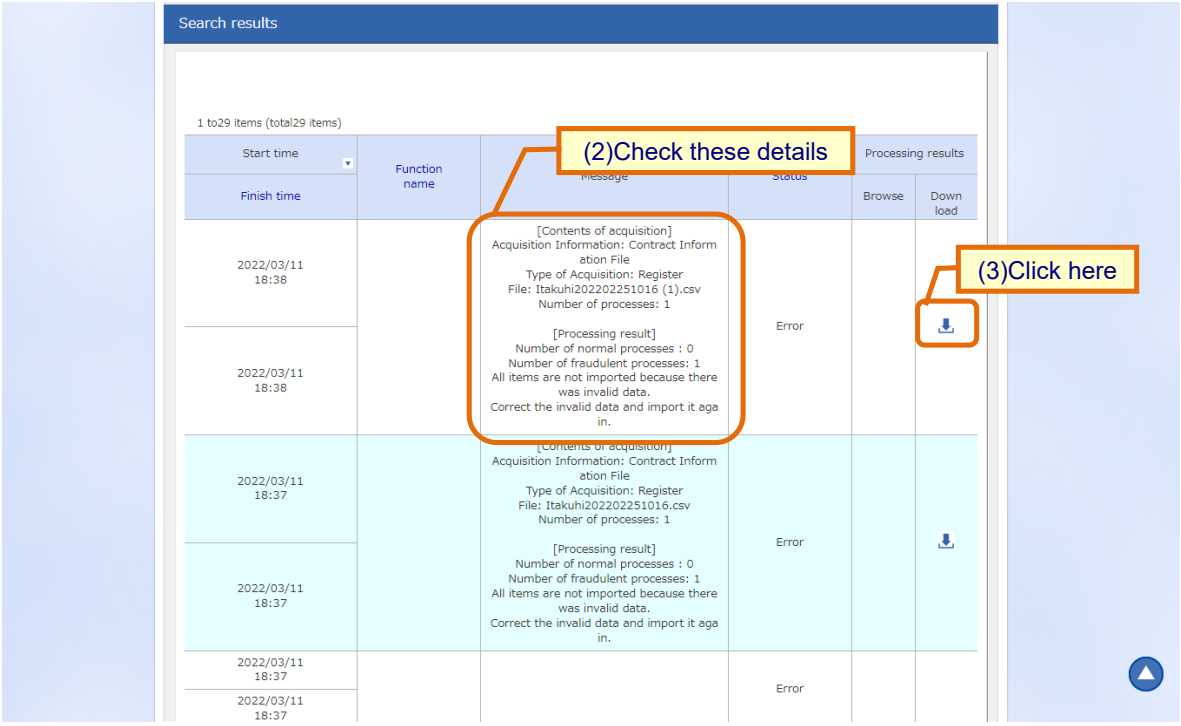
(3) Click the "Confirm" button.

(6) Import instruction (confirm input details)

The [Complete registration of Import] screen is displayed.



(1) Click "The results can be downloaded from the processing results list.".



(2) Check whether it is "Finished successfully".

(3) If there is an error, click the "Download" icon and confirm the error details.