6 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.
→"6.1 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.
→"6.2 Resuming Saved Input"

➢ Check registered details
You can check the details of your financial results after registering them.
→"6.3 Checking Registered Details"

➢ Registering the report members
You can register the results’ report members and set the right of viewing/editing.
→"6.4 Registering The Report Members"

➢ Pulling back financial results
You can pull back financial results that you have submitted.
→"6.5 Pulling Back Financial Results"

➢ Delete financial results
You can delete financial results.
→"6.6 Deleting Financial Results"

➢ Import financial results
You can register financial results in union.
→"6.7 Importing Financial Results"
6.1 Creating New Financial Results

This section explains how to create new financial results.

Process Operations

<table>
<thead>
<tr>
<th>Screen</th>
<th>Operation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top</td>
<td>(1) Select &quot;Submitted proposals &gt; Result report submission status&quot; in the Global Menu</td>
</tr>
<tr>
<td>Financial results Submission Status List</td>
<td>(2) Search for your project</td>
</tr>
<tr>
<td>Procedures for Submitted Applications and Approved Projects</td>
<td>(3) Select &quot;New&quot; under &quot;Financial results&quot;</td>
</tr>
<tr>
<td>Register Financial Statement</td>
<td>(4) Register your financial results</td>
</tr>
<tr>
<td>Register financial results details (confirm input details)</td>
<td>(5) Check the details you have input</td>
</tr>
<tr>
<td>Financial results details (contract research submitted)</td>
<td>(6) Your financial results have been submitted</td>
</tr>
</tbody>
</table>
(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 [Financial results Submission Status List] screen is displayed.

① Input search terms. Input of year is required.

② Click the "Search" button.
   - Clicking "Search" without entering search terms displays all current applications and adopted projects.

The search results are displayed.

③ Click the "Financial results Edit / Inquiry" button.
Financial results PDF batch
download

○ 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.

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.

Status

○ Status for managing financial results submission status.

■ Status for each status

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

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

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

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 "Confirm" 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 "Confirm" button.
Check the financial results that have been input

(a) For subsidies

The [Register financial results details (subsidies) (confirm input details)] screen is displayed.

1. Check the entries.
2. Click the "Submit" button.

Preview financial statements

- Click the "Preview financial statements" button to output the report with your input details as a PDF.
(b) For contract research

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

1. Check the details.
2. Click the "Submit" button.
(6) 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.
6.2 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.

**Process Operations**

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Top</td>
<td>(1) Select &quot;Submitted proposals &gt; Result report submission status&quot; in the Global Menu</td>
</tr>
<tr>
<td>Financial results Submission Status List</td>
<td>(2) Search for your project</td>
</tr>
<tr>
<td>Procedures for Submitted Applications and Approved Projects</td>
<td>(3) Select &quot;Resume&quot; under &quot;Financial results&quot;</td>
</tr>
<tr>
<td>Register Financial Statement</td>
<td>(4) Register your financial results</td>
</tr>
<tr>
<td>Register financial results details (confirm input details)</td>
<td>(5) Check the details you have input</td>
</tr>
<tr>
<td>Financial results details submitted</td>
<td>(6) Your financial results have been submitted</td>
</tr>
</tbody>
</table>

Select "Submitted proposals > Result report submission status" in the Global Menu.
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 [Financial results Submission Status List] screen is displayed.

① Input search terms. Input of year is required.
② Click the "Search" button.
   - Clicking "Search" without entering search terms displays all current applications and adopted projects.
The search results are displayed.

③ Click the "Financial results Edit / Inquiry" button.

See P.5 "6.1 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 "Confirm" button.

The rest of this process is the same as P.8 "(4) Enter your financial results" of "6.1 Creating New Financial Results".
(b) For contract research
The [Register financial results (contract research)] screen is displayed.

① Enter the details.
② Click the “Confirm Registration” button.
The rest of this process is the same as P9 "(4) Enter your financial results" of "6.1 Creating New Financial Results".
### 6.3 Checking Registered Details

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

#### Process Operations

<table>
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<tr>
<td>Top</td>
<td>(1) Select &quot;Submitted proposals &gt; Result report submission status&quot; in the Global Menu</td>
</tr>
<tr>
<td>Financial results Submission Status List</td>
<td>(2) Search for your project</td>
</tr>
<tr>
<td>Procedures for Submitted Applications and Approved Projects</td>
<td>(3) Select &quot;Browse&quot; under &quot;Financial results&quot;</td>
</tr>
<tr>
<td>Reference registered financial results details</td>
<td>(4) Check your financial results</td>
</tr>
</tbody>
</table>
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 [Financial results Submission Status List] screen is displayed.

① Input search terms. Input of year is required.
② Click the "Search" button.
   - Clicking "Search" without entering search terms displays all current applications and adopted projects.
The search results are displayed.

③ Click the "Financial results Edit / Inquiry" button.

See P.5 "6.1 Creating New Financial Results (2) Search for your project" for details on "Financial results PDF batch download" 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.
6.4 Registering The Report Members

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

<table>
<thead>
<tr>
<th>Screen</th>
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</tr>
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<tbody>
<tr>
<td>Top</td>
<td>(1) Select &quot;Submitted proposals &gt; Result report submission status&quot; in the Global Menu</td>
</tr>
<tr>
<td>Financial results Submission Status List</td>
<td>(2) Search for your project</td>
</tr>
<tr>
<td>Procedures for Submitted Applications and Approved Projects</td>
<td>(3) Select &quot;Edit&quot; under &quot;Financial result&quot;</td>
</tr>
<tr>
<td>Setting report members of financial results</td>
<td>(4) Register results’ report members</td>
</tr>
<tr>
<td>Setting project members of financial results (confirm input details)</td>
<td>(5) Check registration of results’ report members</td>
</tr>
<tr>
<td>Setting project members of financial results submitted</td>
<td>(6) Results’ report member has been submitted</td>
</tr>
</tbody>
</table>
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 [Financial results Submission Status List] screen is displayed.

① Input search terms. Input of year is required.
② Click the "Search" button.
   * Clicking "Search" without entering search terms displays all current applications and adopted projects.
The search results are displayed.

1. Click the "Financial results Edit / Inquiry" button.

See P.5 “6.1 Creating New Financial Results (2) Search for your project” for details on “Financial results PDF batch download” 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 Fill out these fields

② Click the “confirm” 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) Check registration of results’ report members

The [Setting project members of financial results (confirm input details)] screen is displayed.

① Check input information and click the “Confirm” button.
(6) 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.

This completes the procedure for registering results’ report members.
6.5 Pulling back Financial Results

This section explains how to pull back registered financial results.

### Process Operations

<table>
<thead>
<tr>
<th>Screen</th>
<th>Operation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top</td>
<td>(1) Select &quot;Submitted proposal &gt; Result report submission status&quot; in the Global Menu</td>
</tr>
<tr>
<td>Financial results Submission Status List</td>
<td>(2) Search for your project</td>
</tr>
<tr>
<td>Procedures for Submitted Applications and Approved Projects</td>
<td>(3) Select &quot;Pull back&quot; under &quot;Financial results&quot;</td>
</tr>
<tr>
<td>Pull back the financial results details you have input (Check the details you have input)</td>
<td>(4) Check the details you have input</td>
</tr>
<tr>
<td>Financial results details pulled back</td>
<td>(5) Your financial results have been pulled back</td>
</tr>
</tbody>
</table>
Instructions

(1) Selection in the Global Menu

Click "Submitted proposals > Result report submission status " in the Global Menu on the top screen'
(2) Search for your project

The [Financial results Submission Status List] screen is displayed.

1. Input search terms. Input of year is required.
2. Click the "Search" button.
   - Clicking "Search" without entering search terms displays all current applications and adopted projects.
The search results are displayed.

① Click the "Financial results Edit/Inquiry" button.

See P.5 “6.1 Creating New Financial Results (2) Search for your project” for details on “Financial results PDF batchdownload” and “Download search results (Financial results)”.

(3)Click here
(3) Select "Pull back" under "Financial results"

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

1. Click the "Pull back" 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.
Your financial results have been pulled back

The [Financial results details pulled back] is displayed on the "Procedures for Submitted Applications and Approved Projects" screen.

This completes the procedure for pulling back financial results.
6.6 Deleting Financial Results

This section explains how to delete temporarily saved financial results.

**Process Operations**

<table>
<thead>
<tr>
<th>Screen</th>
<th>Operation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top</td>
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</tr>
<tr>
<td>Financial results Submission Status List</td>
<td>(2) Search for your project</td>
</tr>
<tr>
<td><strong>Procedures for Submitted Applications and Approved Projects</strong></td>
<td>(3) Select &quot;Delete&quot; under &quot;Financial results&quot;</td>
</tr>
<tr>
<td>Delete annual financial reports</td>
<td>(4) Check the deletion</td>
</tr>
<tr>
<td>Financial results details deleted</td>
<td>(5) Your financial results have been deleted</td>
</tr>
</tbody>
</table>
(1) Selection in the Global Menu

Click "Submitted proposal > Result report submission status" in the Global Menu on the top screen.
(2) Search for your project

The [Financial results Submission Status List] screen is displayed.

1. Input search terms. Input of year is required.
2. Click the "Search" button.
   - Clicking "Search" without entering search terms displays all current applications and adopted projects.
The search results are displayed.

③ Click the "Financial results Edit/Inquiry" button.

See P.5 "6.1 Creating New Financial Results (2) Search for your project" for details on “Financial results PDF batch download” and “Download search results (Financial results)".

(3)Click here
(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 [Delete annual financial reports] screen is displayed.

1. Check the deletion.
2. Click the “Delete” button.
(5) Your financial results have been deleted

The [Financial results details deleted] screen is displayed.

This completes the procedure for deleting financial results.
### 6.7 Importing Financial Results

This section explains how to import financial results.

#### Process Operations

<table>
<thead>
<tr>
<th>Screen</th>
<th>Operation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top</td>
<td>(1) Select &quot;Submitted proposals &gt; Result report submission status&quot; in the Global Menu</td>
</tr>
<tr>
<td>Financial results Submission Status List</td>
<td>(2) Search for your project</td>
</tr>
<tr>
<td>Procedures for Submitted Applications and Approved Projects</td>
<td>(3) Select &quot;New&quot; under &quot;Financial results&quot;</td>
</tr>
<tr>
<td>Register Financial Results(contract research)</td>
<td>(4) Input your financial results</td>
</tr>
<tr>
<td>Import Instruction</td>
<td>(5) Import instruction</td>
</tr>
<tr>
<td>Complete registration of Import</td>
<td>(6) Your financial results have been submitted</td>
</tr>
</tbody>
</table>
(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 [Financial results Submission Status List] screen is displayed.

① Input search terms. Input of year is required.
② Click the "Search" button.
   • Clicking "Search" without entering search terms displays all current applications and adopted projects.
(3) Select "New" under "Financial results"

The [Financial results Submission Status List] screen is displayed.

① Click the "Financial results Edit/Inquiry" 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 [Import Instruction (confirm input details)] screen is displayed.

① Click the “Confirm” button.

② Click the “Download” button.
③ Check whether it is “Finished successfully”.
④ If there is an error, click the “Download” button and confirm the error details.
Revision History

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version 1.00</td>
<td>Feb 25, 2020</td>
<td>Final release response</td>
</tr>
</tbody>
</table>