

Concur Expense: JPT on NextGen UI

Setup Guide for Standard Edition

Last Revised: August 26, 2022

Applies to these SAP Concur solutions:

- Expense
 - Professional/Premium edition
 - Standard edition

- Travel
 - Professional/Premium edition
 - Standard edition

- Invoice
 - Professional/Premium edition
 - Standard edition

- Request
 - Professional/Premium edition
 - Standard edition

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Revision History

Date	Notes / Comments / Changes
August 26, 2022	Updated screenshots and path information for commuter pass screens.
April 23, 2022	Added new section (section 7) for Audit Rules.
December 10, 2021	<p>Added several new sections to <i>Section 3: What the User Sees</i> that detail the new Favorites feature. New sections address how to add a favorite route, add a JPT expense from a favorite route, saving and adding another JPT expense, deleting a favorite route from both the Route Search and Favorite Routes tabs, adding an expense from a favorite route for the requested trip date and time, and adding a favorite via station.</p> <p>Added a new <i>Exporting Commuter Passes</i> section to the <i>Managing the Commuter Pass Routes</i> section.</p>
November 5, 2021	Minor edits.
September 29, 2021	Minor text edits.
September 23, 2021	Removed reference to manual option for users typing in an entry in the <i>Creating a JPT on NextGen UI Expense Report Using Route Search</i> section.
September 14, 2021	Added note regarding the future availability of JPT on NextGen UI in the China data center in the <i>Overview</i> section.
August 27, 2021	Updated feature name from JPT 2.0 to JPT on NextGen UI.
June 30, 2021	New guide.

Japan Public Transport on NextGen UI

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

This page of Product Settings is visible only when enabled by SAP Concur support.

Section 1: Overview

The typical businessperson in Japan can have multiple train rides per day that they will track and process for reimbursement. To answer the need to expense this type of travel, Concur designed and integrated the Japan Public Transport (JPT) 2.0 feature into the Expense product.

This feature allows users to quickly expense JPT in several ways:

- IC Card import using a network IC Card reader
- Route search (look up routes bases on a from/to station)

Who Should Use This Feature?

The Japan Public Transport feature is intended for use by multinational companies with employees located in Japan or with employees traveling in Japan. The rail content sourced is specific to the Japan marketplace. The feature cannot be used with any rail content outside of Japan.

Customers who have employees located in Japan can use this feature as an Add-On. Please contact to your Account Manager if you want to start using this feature.

Required Roles

There are no required roles to use the Japan Public Transport feature; you need only have the **Can Submit Expense Reports** role.

NOTE: The SAP Concur administrator must enable this feature. When enabled, the Japan Public Transportation expense type is activated by default for the country of Japan. The Employee Administration Country for that user must be "Japan" if the multiple countries setting is activated for that Entity.

Section 2: Accessing Japan Public Transport

Users access this feature by selecting the *Japan Public Transportation* expense type when creating an expense report.

Section 3: What the Employee Sees

NOTE: For the country of Japan, the *Japan Public Transportation* expense type is activated by default. The Employee Administration Country for that user must be "Japan" if the multiple countries setting is activated for that Entity.

Section 3: What the Employee Sees

The employee is granted access to the Japan Public Transport (JPT) feature and options in the following areas of Concur Expense:

- **When Creating the Expense Report:** The user selects the *Japan Public Transportation* expense type to expose options that let them add the routes they have traveled.

The screenshot shows the 'Add Expense' window. At the top, it says 'Add Expense' with a close button. Below that, there are two tabs: '0 Available Expenses' and '+ Create New Expense'. Underneath is a search bar labeled 'Search for an expense type'. A list of expense categories is displayed: '01. Travel Expenses' (Hotel, Laundry) and '02. Transportation' (Airfare, Airline Fees, Car Maintenance/Repairs, Car Rental, Fuel, and Japan Public Transportation). The 'Japan Public Transportation' option is highlighted with a red box.

- **My Profile:** The user's Profile page includes links that let them add or delete commuter pass routes they transit.

The screenshot shows the 'Expense Settings' menu. The items listed are: Expense Information, Expense Delegates, Expense Preferences, Expense Approvers, Company Car, Favorite Attendees, and Commuter Pass Routes. The 'Commuter Pass Routes' option is highlighted with a red box.

Section 3: What the Employee Sees

The JPT feature allows users to expense JPT using route searches to search for and select their applicable journeys for reimbursement, add a commuter pass to their profile.

CREATING A JPT EXPENSE REPORT USING ROUTE SEARCH

Users can create an expense report using the policy to which JPT expense type is activated when the client is configured with the JPT feature.

The screenshot shows the 'Create New Report' form. It includes the following fields and controls:

- Report Name ***: Text input field containing 'Japan Expense Policy'.
- Report Date**: Date input field containing '08/19/2021' with a calendar icon.
- Business Purpose ***: Text input field, marked as a required field.
- 支店**: Dropdown menu with 'None Selected'.
- Comment**: Large text area for entering a comment.
- Buttons**: 'Cancel' and 'Create Report' buttons at the bottom right.

When the report is created, the report currency is displayed as configured for that user's reimbursement currency.

The screenshot shows the SAP Concur Expense report view. The report title is 'Japan 2021 Conference ¥0', which is highlighted with a red box. The report status is 'Not Submitted'. The report details include a 'Submit Report' button and a toolbar with the following actions: 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. Below the report details, it states 'No Expenses' and 'Add expenses to this report to submit for reimbursement.'

Section 3: What the Employee Sees

When a user creates a new JPT expense, they will select **Japan Public Transportation**.

The screenshot shows the 'Add Expense' window. At the top left, it says 'Add Expense' with a close button. Below that, there are two buttons: '0 Available Expenses' and '+ Create New Expense'. A search bar is present with the placeholder text 'Search for an expense type'. Below the search bar, there are two main categories: '01. Travel Expenses' and '02. Transportation'. Under '01. Travel Expenses', there are 'Hotel' and 'Laundry'. Under '02. Transportation', there are 'Airfare', 'Airline Fees', 'Car Maintenance/Repairs', 'Car Rental', 'Fuel', and 'Japan Public Transportation'. The 'Japan Public Transportation' option is highlighted with a red rectangular box.

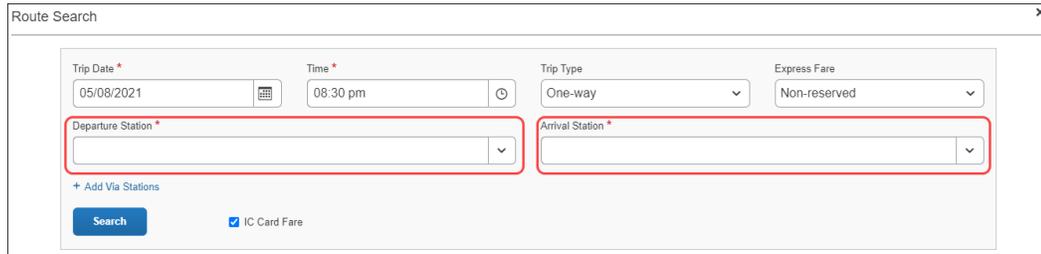
Users will provide the required route search criteria:

- ◆ Trip Date: The date the trip occurred.
- ◆ Time: The time the trip occurred.
- ◆ Trip Type: The type of trip taken – **One-way** or **Round Trip**.
- ◆ Seat Type: The user has three options: **Non-reserved**, **Reserved**, or **Green (first class)**

The screenshot shows the 'Route Search' window. It has a search bar at the top. Below the search bar, there are four input fields: 'Trip Date *' (05/08/2021), 'Time *' (08:30 pm), 'Trip Type' (One-way), and 'Express Fare' (Non-reserved). Below these are two dropdown menus for 'Departure Station *' and 'Arrival Station *'. Below those are two more dropdown menus for 'Via 1' and 'Via 2'. At the bottom, there is a 'Search' button and a checked checkbox for 'IC Card Fare'.

Section 3: What the Employee Sees

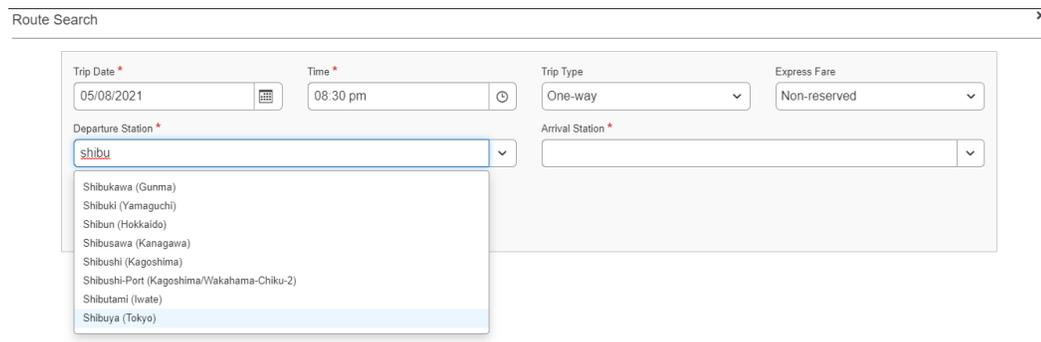
Users can perform a route search by searching for and selecting both a **Departure Station** and **Arrival Station**.



The screenshot shows the 'Route Search' form with the following fields and options:

- Trip Date: 05/08/2021
- Time: 08:30 pm
- Trip Type: One-way
- Express Fare: Non-reserved
- Departure Station: (Empty dropdown menu)
- Arrival Station: (Empty dropdown menu)
- + Add Via Stations
- Search button
- IC Card Fare

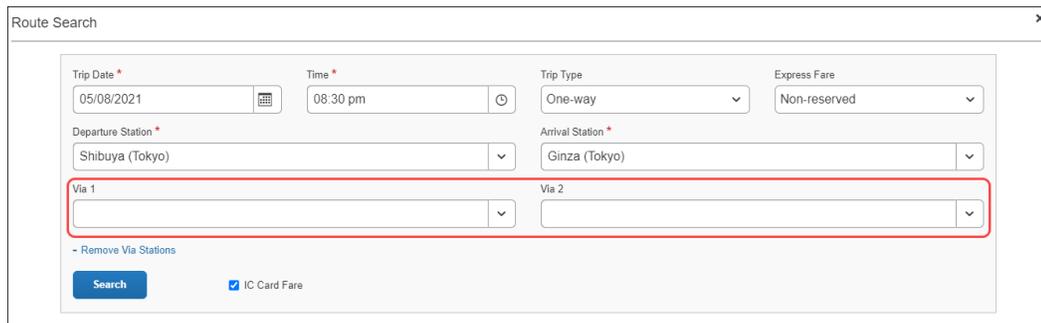
As the user types, Concur Expense deploys a search and filter list, allowing users to select the appropriate departure station and arrival station as it appears in the list.



The screenshot shows the 'Route Search' form with the following fields and options:

- Trip Date: 05/08/2021
- Time: 08:30 pm
- Trip Type: One-way
- Express Fare: Non-reserved
- Departure Station: shibu (with a dropdown list of suggestions: Shibukawa (Gunma), Shibuki (Yamaguchi), Shibun (Hokkaido), Shibusawa (Kanagawa), Shibushi (Kagoshima), Shibushi-Port (Kagoshima/Wakahama-Chiku-2), Shibutami (Iwate), Shibuya (Tokyo))
- Arrival Station: (Empty dropdown menu)
- + Add Via Stations
- Search button
- IC Card Fare

If necessary, users may add up to two via stations as part of their route search by clicking **+Add Via Stations**. As they type, users can use the search and filter list to select the appropriate via station(s) as they appear in the list.



The screenshot shows the 'Route Search' form with the following fields and options:

- Trip Date: 05/08/2021
- Time: 08:30 pm
- Trip Type: One-way
- Express Fare: Non-reserved
- Departure Station: Shibuya (Tokyo)
- Arrival Station: Ginza (Tokyo)
- Via 1: (Empty dropdown menu)
- Via 2: (Empty dropdown menu)
- Remove Via Stations
- Search button
- IC Card Fare

By default, the **IC Card Fare** checkbox is selected. Selecting **IC Card Fare** indicates whether the user ("traveler") paid for their ticket using their travel card or if the ticket was purchased from the ticket counter. The prices may differ based on the payment method used.

NOTE: Most of the time, users will select the **IC Card Fare** option. Therefore, **IC Card Fare** is selected by default.

Section 3: What the Employee Sees

When the user clicks **Search**, Concur Expense returns a maximum of five route results. These routes ("journeys") will be classified as **Fast**, **Easy**, **Cheap**, or **Commuter Pass** OR none of the designations.

NOTE: These designations are specified if a partner has provided that data to SAP Concur. Depending on the journey, the route can have multiple designations (for example, **Fast** and **Cheap**). A journey with a designation of **Easy** has the fewest number of stops.

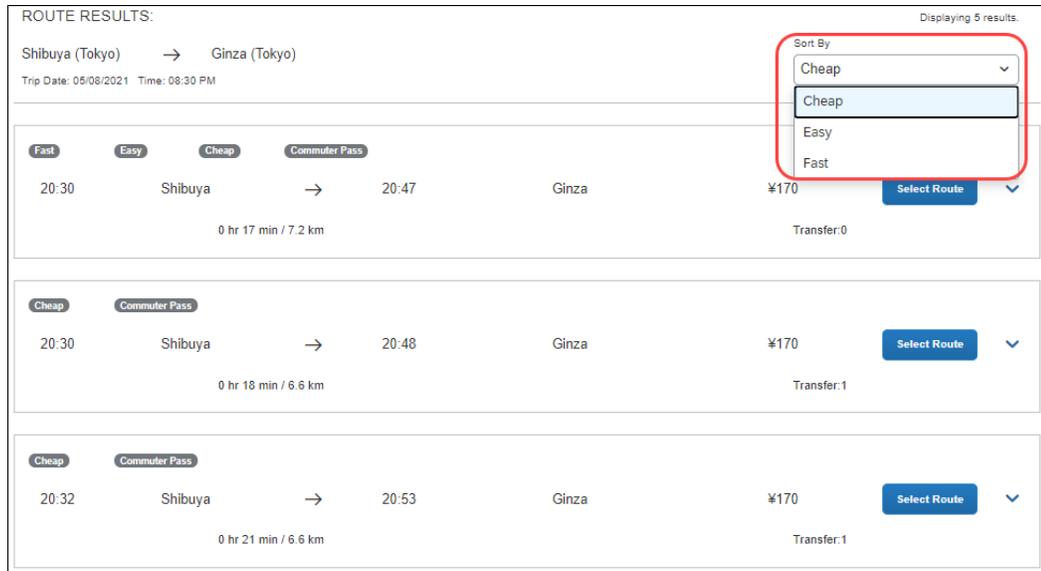
These designations can also help approvers when they review a JPT expense by allowing them to see if the route complies with their organization's travel policy.

The screenshot displays the 'Route Search' interface. The search criteria are: Trip Date: 05/08/2021, Time: 08:30 pm, Trip Type: One-way, Express Fare: Non-reserved, Departure Station: Shibuya (Tokyo), and Arrival Station: Ginza (Tokyo). The search results show three routes from Shibuya to Ginza, all with a fare of ¥170. The first route is classified as 'Fast', 'Easy', 'Cheap', and 'Commuter Pass', with a duration of 0 hr 17 min / 7.2 km and 0 transfers. The second route is classified as 'Cheap' and 'Commuter Pass', with a duration of 0 hr 18 min / 6.6 km and 1 transfer. The third route is classified as 'Cheap' and 'Commuter Pass', with a duration of 0 hr 21 min / 6.6 km and 1 transfer. Each route has a 'Select Route' button.

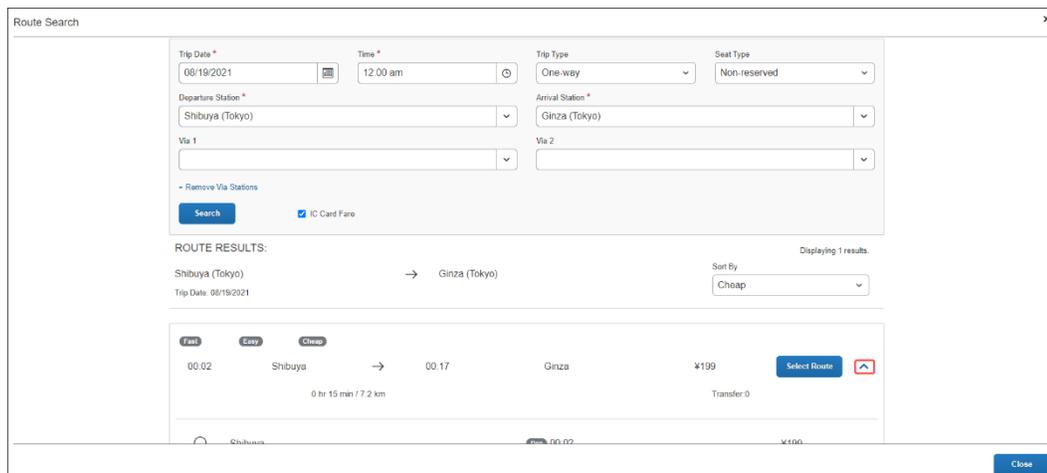
Route Designations	Departure Time	Departure Station	Arrival Time	Arrival Station	Fare	Transfers
Fast, Easy, Cheap, Commuter Pass	20:30	Shibuya	20:47	Ginza	¥170	Transfer: 0
Cheap, Commuter Pass	20:30	Shibuya	20:48	Ginza	¥170	Transfer: 1
Cheap, Commuter Pass	20:32	Shibuya	20:53	Ginza	¥170	Transfer: 1

Section 3: What the Employee Sees

Users can sort the route results using the **Sort By** list, which offers three sorting options: **Cheap**, **Easy**, and **Fast**. A route can have multiple designations or none at all. Therefore, if sorting by **Cheap**, the route results displayed may have other designations.



Users click expand icon to expand the route details and see if additional transportation is required to get to the designated arrival station in the selected route. Icons, such as a bus or a walking person, indicate whether the user needs to take a bus or walk to a stop in the selected route.



Section 3: What the Employee Sees

Once a user selects a route by clicking Select Route button, they will be able to save their JPT expense report by completing the required fields.

The screenshot shows the SAP Concur Expense report form for Japan Public Transportation. The form is titled "Japan Public Transportation ¥0" and includes a "Save Expense" button. The form is divided into several sections:

- Details:** This section contains the following fields:
 - Expense Type: Japan Public Transportation
 - Transaction Date: 05/21/2021
 - Country: JAPAN (JP)
 - Business Purpose: Enter Vendor Name
 - Payment Type: Cash
 - Amount: 0
 - Currency: Japan, Yen
 - Has VAT: No
 - Receipt Status: No Receipt
 - Comment: (Empty text area)
- Route Information:** This section contains the following fields:
 - Total Route Distance (km): 1.1
 - Departure Station: Tokyo
 - Arrival Station: Ginza
 - Source: Route Search
- Additional Charges:** This section contains the following fields:
 - Additional Charges: 0
 - Route Details: Trip: One Way Trip, Trip Attribute: Fast | Easy | Cheap, Ticket: IC Card, Pass: Commuter Pass Deduction

A red box highlights the "Upload Receipt Image" button, which is located on the right side of the form. The button is labeled "Upload Receipt Image" and has a red plus sign icon.

NOTE: The **Expense Type** field will always be **Japan Public Transportation**; you cannot change it to another expense type. When you create an expense report and select **Japan Public Transportation** as the expense type, it is then hardcoded into the expense details.

For example, unlike other expense reports, you cannot change the **Expense Type** to another expense type such as **Hotel** or **Dinner**, when providing the details of the **Japan Public Transportation** expense.

The screenshot shows a mobile application interface for an expense report. At the top, there are navigation arrows, the title 'Japan Public Transportation ¥170', and a trash icon. Below the title is the date '05/08/2021'. The main section is titled 'Details' and contains several fields: 'Expense Type' (highlighted with a red box and containing 'Japan Public Transportation'), 'Transaction Date' (05/08/2021), 'Country' (JAPAN (JP)), 'Business Purpose', 'Enter Vendor Name', and 'Payment Type' (Cash). There are also links for 'Allocate', 'Route Search', and 'Route Details'.

Additional information about JPT expense details page:

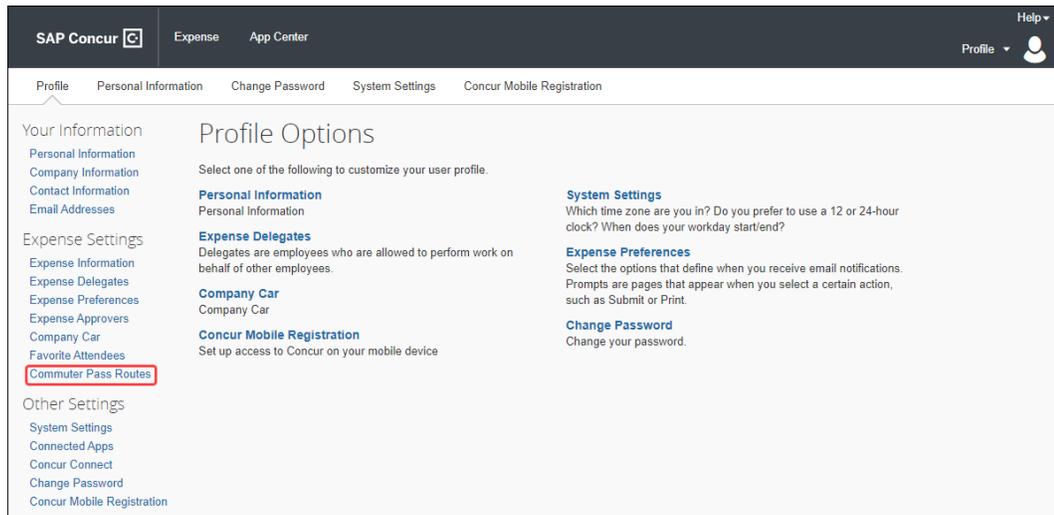
- Users cannot edit the **Transaction Date** field, as the date is extracted from the route search.
- The **Country** field always defaults to **JAPAN (JP)** given the travel will always occur in Japan.
- The **Currency** field will always default to the reimbursement currency configuration that is mapped to that user (in this case, you, the traveler).
- The source of the expense will either be **Route Search** or **IC Card Fare** (through e-receipt).
- Additional charges, such as those assisted with first-class fare, display in the **Additional Charges** fields, if applicable.
- The **Route Details** area display the type of trip (**One Way Trip** or **Round Trip**) and the type of ticket used (**Paper** or **IC Card Fare**).

REGISTERING A COMMUTER PASS

Users can register a commuter pass. Once a commuter pass is registered, it can be used for JPT expense.

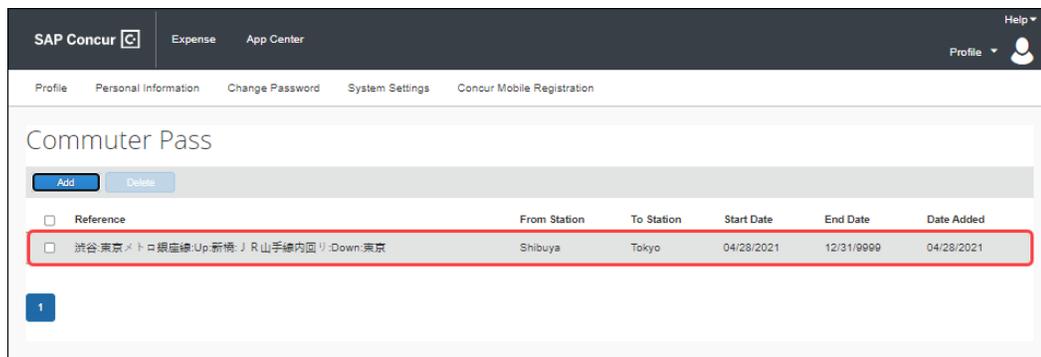
Section 3: What the Employee Sees

From the **Profile Settings** page, users can add a commuter pass if it is configured.



NOTE: Users will only be able to store one commuter pass at a time.

Only one commuter pass is allowed in a date period; a user cannot use multiple commuter passes for the same period. For example, if they use one route on Monday, Wednesday, and Friday, but use another route on Tuesday and Thursday, they cannot use separate passes for the two unique routes.



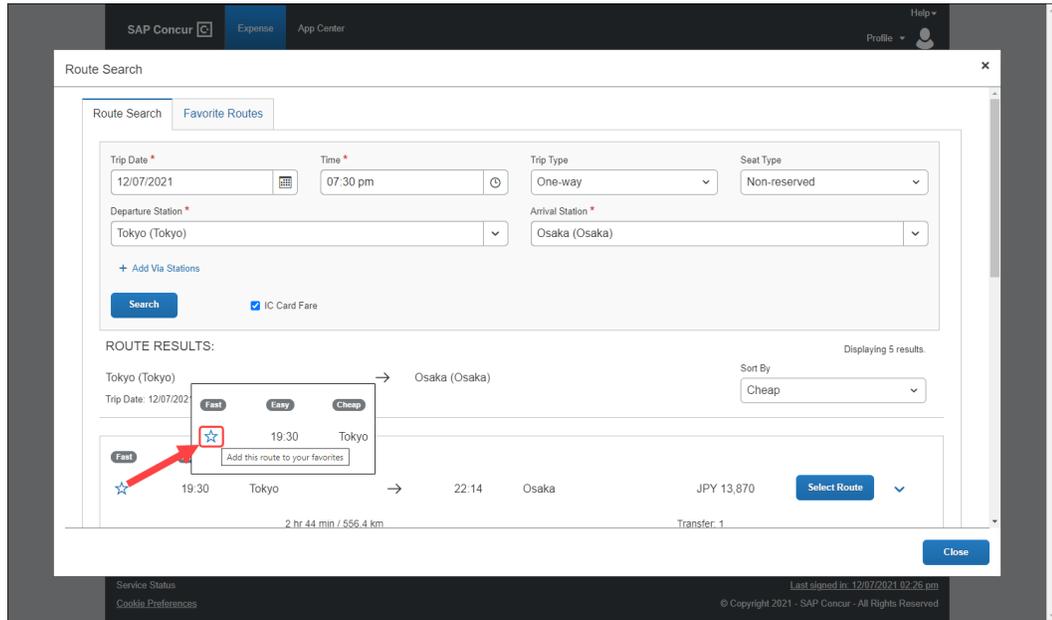
ADDING A FAVORITE ROUTE

Users can configure a route they regularly use (for example, from home to work) and add it to their favorites. When they create a future JPT expense, they can then select the route from the **Favorite Routes** tab.

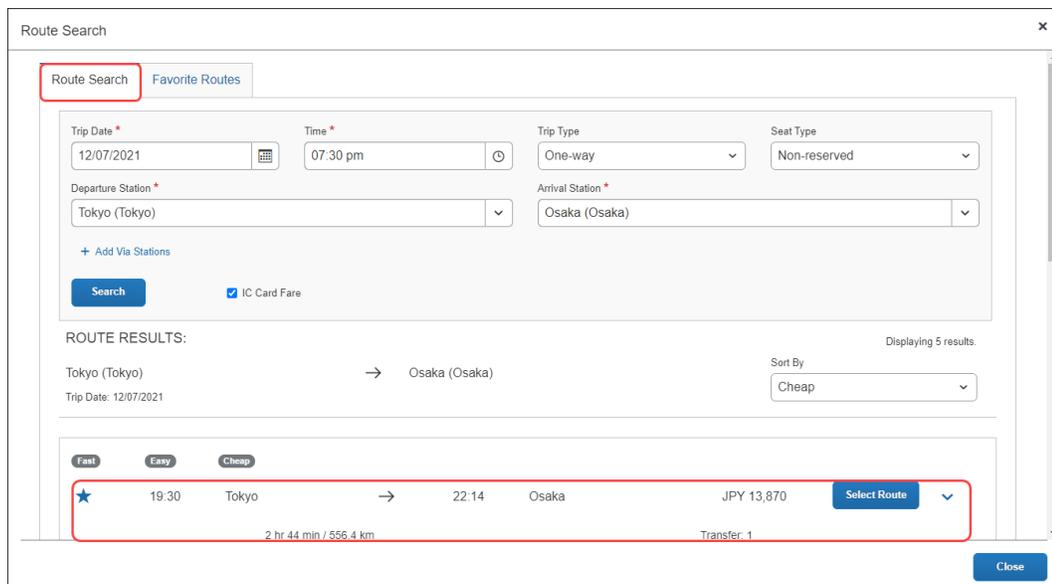
NOTE: Currently, there is no limit to the number of routes you can add to the Favorite Routes tab.

Section 3: What the Employee Sees

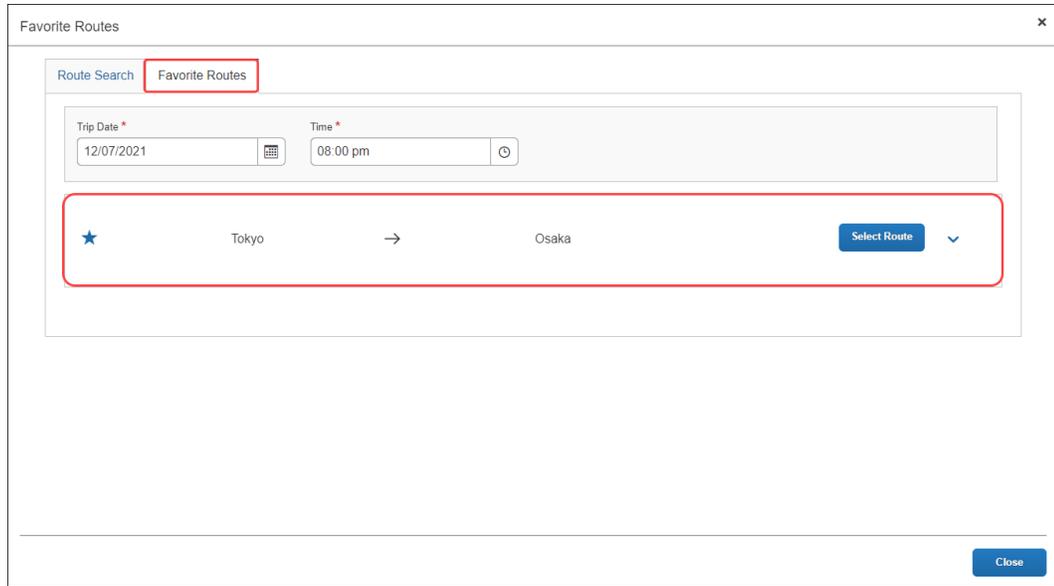
From the **Route Search** window, a user can create a route and mark it as a favorite from the **Route Search** tab.



Once the user clicks the star icon, the Trip route is favorited (the star changes from clear to blue) and added to the **Favorite Routes** tab.



Section 3: What the Employee Sees

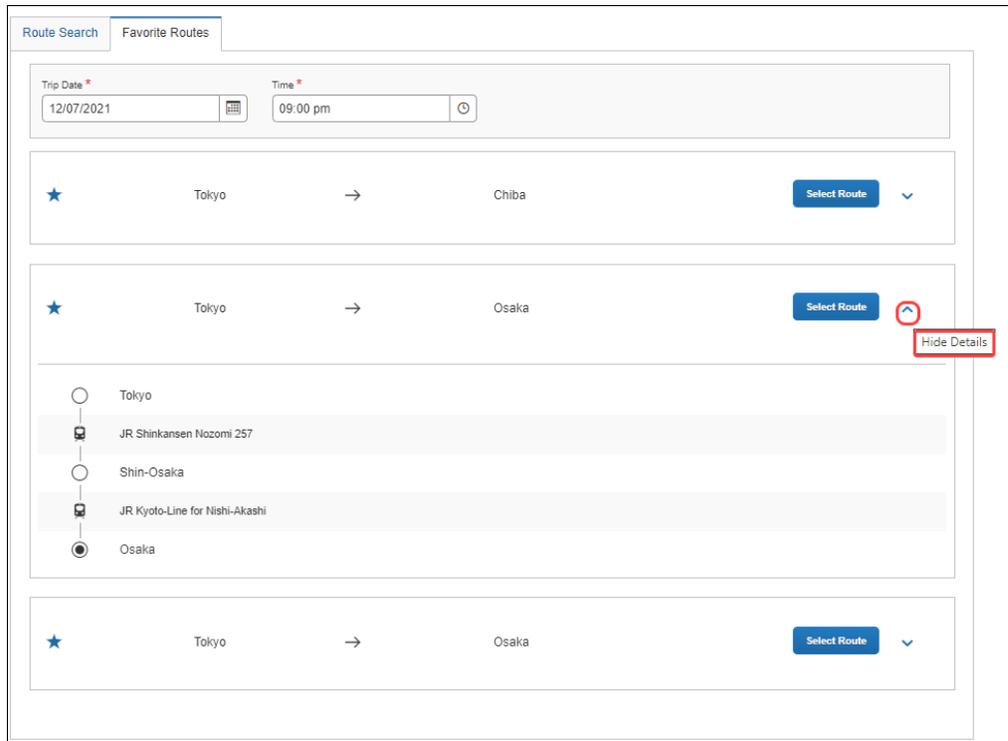


Section 3: What the Employee Sees

NOTE: Users can click the **Show Details** toggle button to display the favorite route's details.



Users can then click the **Hide Details** toggle button to hide the favorite route's details.



Section 3: What the Employee Sees

ADDING A JPT EXPENSE FROM A FAVORITE ROUTE

Users can create a JPT expense and select a favorite route (noted by the star icon).

Favorite Routes

Route Search | **Favorite Routes**

Trip Date * 12/08/2021 Time * 03:00 pm

★	Tokyo	→	Chiba	Select Route
★	Tokyo	→	Osaka	Select Route
★	Tokyo	→	Osaka	Select Route

Close

In the expense report, the departure station and arrival station will pre-populate with the data provided from the favorite route selected.

Japan Public Transportation JPY 13,870

12/08/2021

Details

Route Search | Route Details

Expense Type * Japan Public Transportation

Transaction Date 12/08/2021 Business Purpose Vendor Description City

Payment Type * Cash

Amount 13,870 Currency Japan, Yen Exchange Rate * 1 JPY = 0.66416351 INR Amount in INR 9,211.95

Comment

Total Route Distance (km) 556.4

Departure Station * Tokyo Arrival Station * Osaka Source Route Search

Additional Charges JPY 4,960

Route Details:
Trip: One Way Trip
Ticket: IC Card

Save Expense Save and Add Another Cancel

Section 3: What the Employee Sees

Users can then save the expense or save the current JPT expense and add another JPT expense.

SAVING AND ADDING ANOTHER JPT EXPENSE

Users can save a JPT expense and then add another JPT expense (to the same expense report) by clicking the **Save and Add Another** button.

The screenshot shows the 'Japan Public Transportation JPY 13,870' expense entry form. The form is titled 'Details' and includes a 'Cancel' button and a 'Save Expense' button in the top right corner. The form contains the following fields and sections:

- Expense Type:** Japan Public Transportation (Required field)
- Transaction Date:** 12/08/2021
- Business Purpose:** (Empty field)
- Vendor Description:** (Empty field)
- City:** (Dropdown menu)
- Payment Type:** Cash (Required field)
- Amount:** 13,870
- Currency:** Japan, Yen
- Exchange Rate:** 1 JPY = 0.66416351 (Reverse button)
- Amount in INR:** 9,211.95
- Comment:** (Large text area)
- Total Route Distance (km):** 556.4
- Departure Station:** Tokyo (Required field)
- Arrival Station:** Osaka (Required field)
- Source:** Route Search
- Additional Charges:** JPY 4,960
- Route Details:** Trip: One Way Trip, Ticket: IC Card

At the bottom of the form, there are three buttons: 'Save Expense', 'Save and Add Another' (highlighted with a red border), and 'Cancel'.

Section 3: What the Employee Sees

The JPT expense is saved, and the **New Expense** window will open.

The screenshot shows the SAP Concur 'New Expense' form. The form is titled 'New Expense' and has a 'Details' tab selected. The 'Expense Type' field is a dropdown menu with the placeholder text 'Search for an expense type'. Below the dropdown are three buttons: 'Save Expense', 'Save and Add Another', and 'Cancel'. The top navigation bar shows 'SAP Concur', 'Expense', and 'App Center'. The bottom footer contains the SAP logo, 'Service Status', 'Cookie Preferences', 'SAP Concur', and 'Last signed in: 12/08/2021 09:37 am'.

Users can select any expense, but in this case, they select **Japan Public Transportation**.

Section 3: What the Employee Sees

Users can select a route using a route search OR select a favorite route on the **Favorite Routes** tab.

The screenshot shows a dialog box titled "Favorite Routes" with a close button (X) in the top right corner. It has two tabs: "Route Search" and "Favorite Routes", with the latter being selected and highlighted by a red box. Below the tabs, there are input fields for "Trip Date" (12/08/2021) and "Time" (03:00 pm). Below these are three route entries, each with a star icon on the left and a "Select Route" button on the right. The middle route, "Tokyo → Osaka", is highlighted with a red box. At the bottom right of the dialog is a "Close" button.

The JPT expense report reflects the newest JPT expense added using the **Favorites Route** tab.

The screenshot shows the "Japan Public Transportation" expense report form. At the top, it displays "Japan Public Transportation JPY 25,990" and "12/08/2021". There are "Cancel" and "Save Expense" buttons. The "Details" tab is active, showing a search bar for "Route Search" and "Route Details". The "Expense Type" is "Japan Public Transportation". The "Transaction Date" is "12/08/2021". The "Payment Type" is "Cash". The "Amount" is "25,990" in "Japan, Yen" currency, with an "Exchange Rate" of "1 JPY = 0.66416351 INR". The "Total Route Distance (km)" is "1121.7". The "Departure Station" is "Tokyo" and the "Arrival Station" is "Chiba", both highlighted with a red box. The "Source" is "Route Search". The "Additional Charges" are "JPY 4,960". At the bottom, there are "Save Expense", "Save and Add Another", and "Cancel" buttons.

Section 3: What the Employee Sees

Users can choose (again) whether to save the JPT expense or clicking **Save and Add Another** to save another expense to the expense report.

The screenshot shows the 'Manage Expenses' interface for a 'Japan Public Transportation' expense. The header includes 'Manage Expenses' and 'Process Reports' tabs, the expense title 'Japan Public Transportation JPY 25,990', a trash icon, and 'Cancel' and 'Save Expense' buttons. The main form is titled 'Details' and contains the following fields:

- Expense Type:** Japan Public Transportation (marked as a required field).
- Transaction Date:** 12/08/2021
- Business Purpose:** (empty)
- Vendor Description:** (empty)
- City:** (dropdown menu)
- Payment Type:** Cash (dropdown menu)
- Amount:** 25,990
- Currency:** Japan, Yen
- Exchange Rate:** 1 JPY = 0.66416351 (with a 'Reverse' link)
- Amount in INR:** 17,261.61
- Comment:** (text area)
- Total Route Distance (km):** 1121.7
- Departure Station:** Tokyo
- Arrival Station:** Chiba
- Source:** Route Search
- Additional Charges:** JPY 4,960
- Route Details:** Trip: One Way Trip, Ticket: IC Card

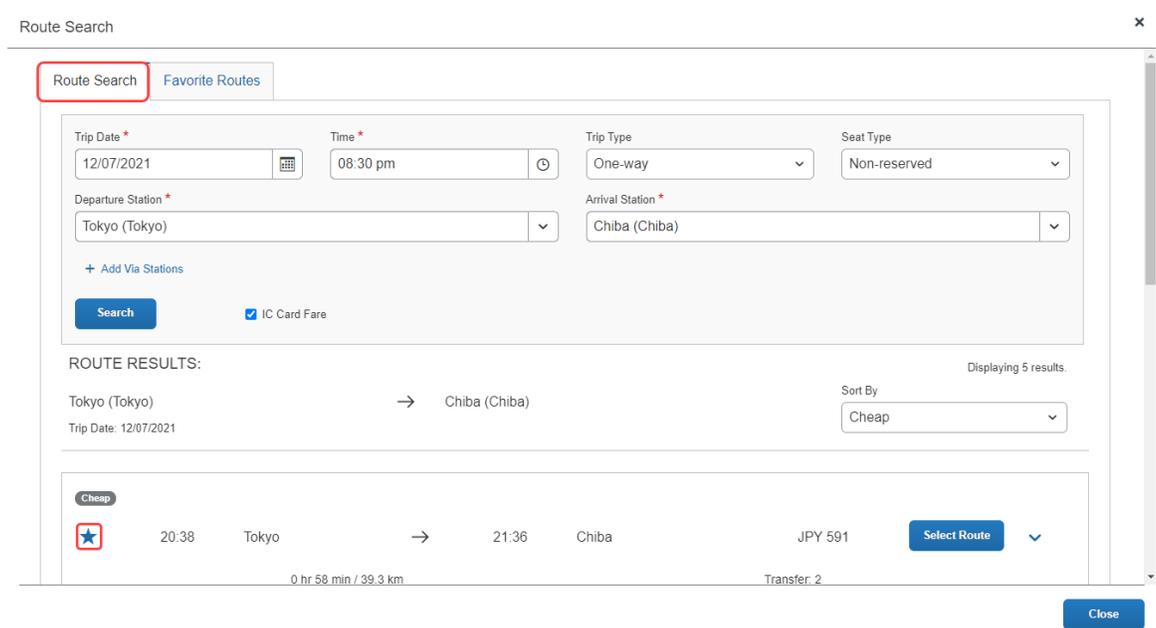
At the bottom of the form, there are three buttons: 'Save Expense', 'Save and Add Another' (highlighted with a red box), and 'Cancel'.

DELETING A FAVORITE ROUTE FROM THE ROUTE SEARCH

Users can delete a favorite route from the **Route Search** tab by clicking the star icon to remove it as a favorite.

NOTE: The favorite route will also be deleted from the **Favorite Routes** tab.

Deleting a favorite route does NOT affect any previous JPT expenses submitted using a favorite route.

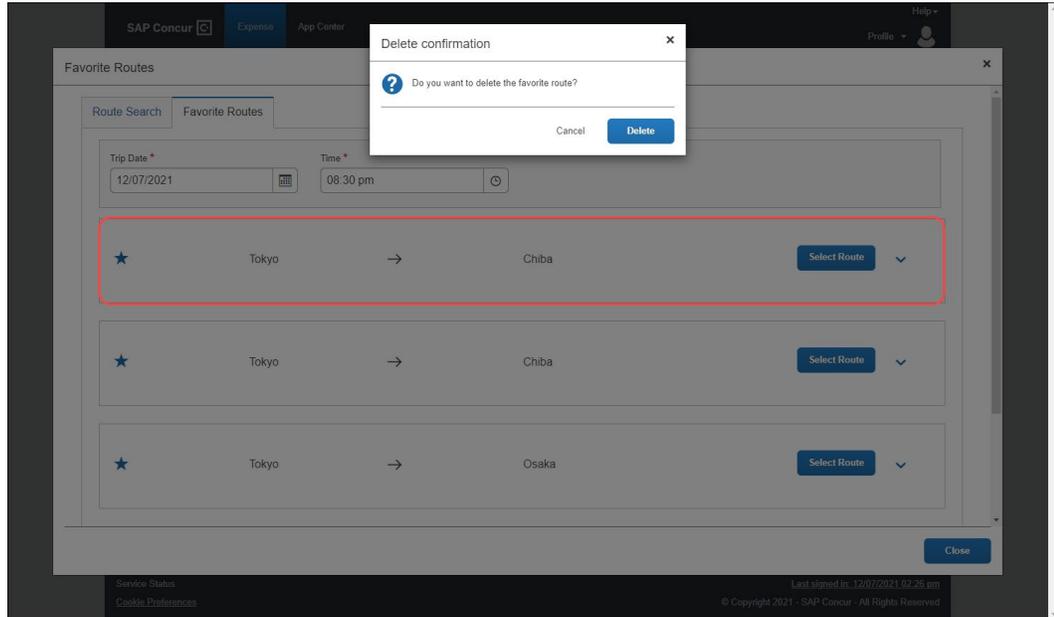


Section 3: What the Employee Sees

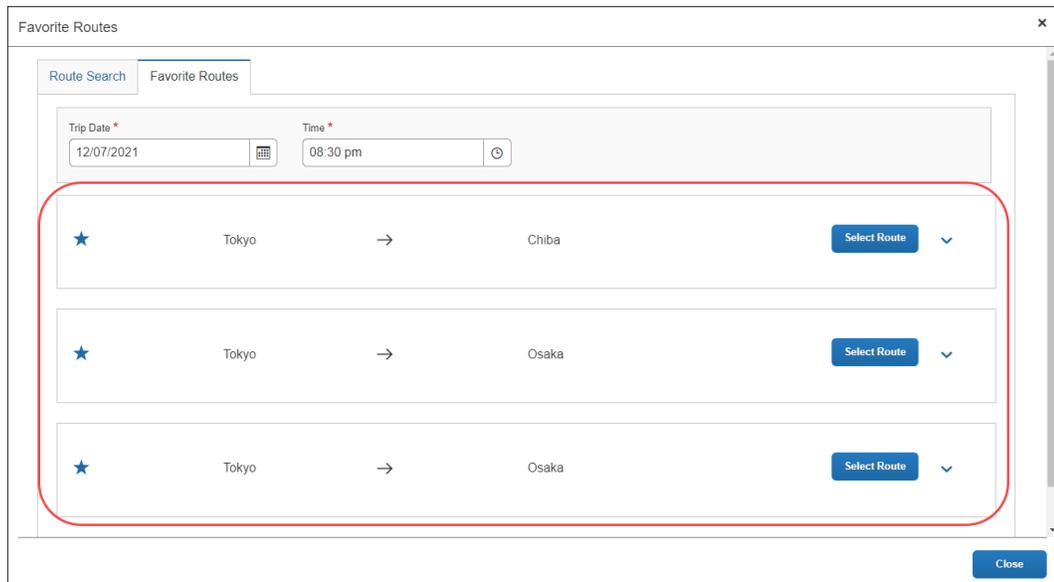
DELETING A FAVORITE ROUTE FROM THE FAVORITE ROUTES TAB

Users can delete a favorite route from the **Favorite Routes** tab by clicking the star icon to remove it as a favorite.

NOTE: Deleting a favorite route does NOT affect any previous JPT expenses submitted using a favorite route.

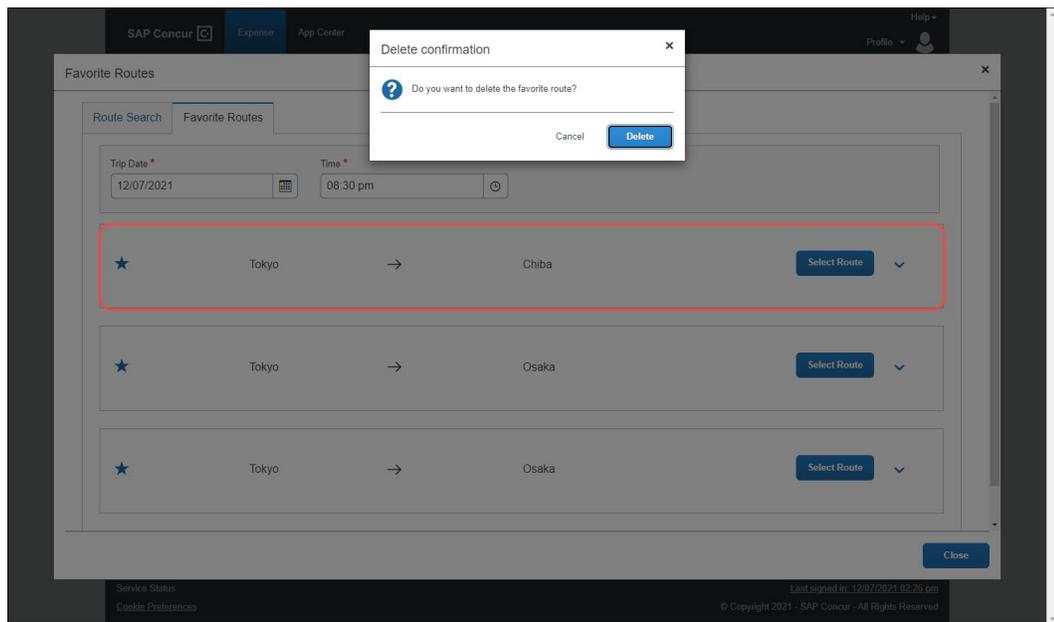
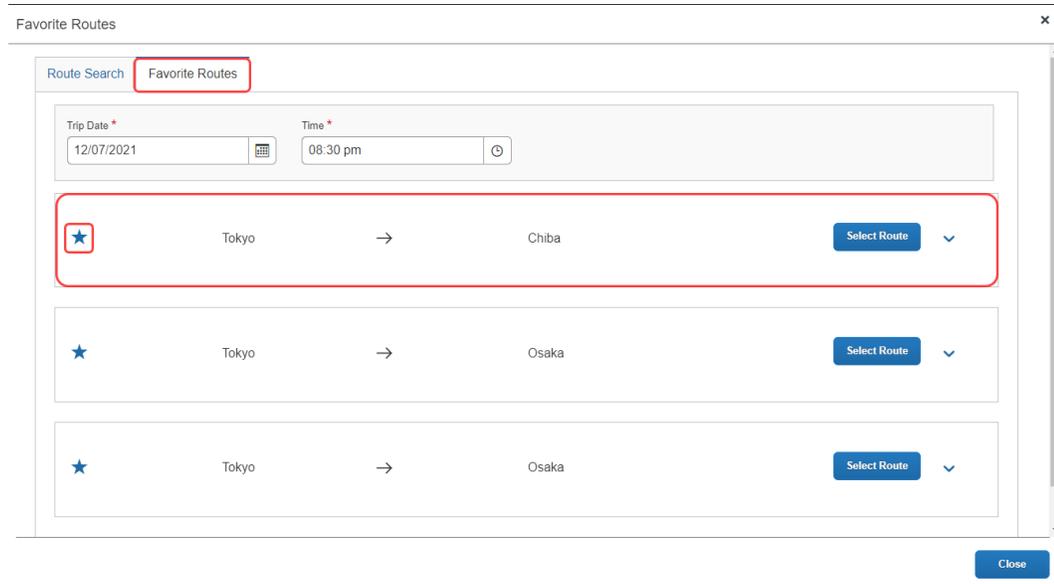


The route is removed, and the **Favorite Routes** list tab is updated.



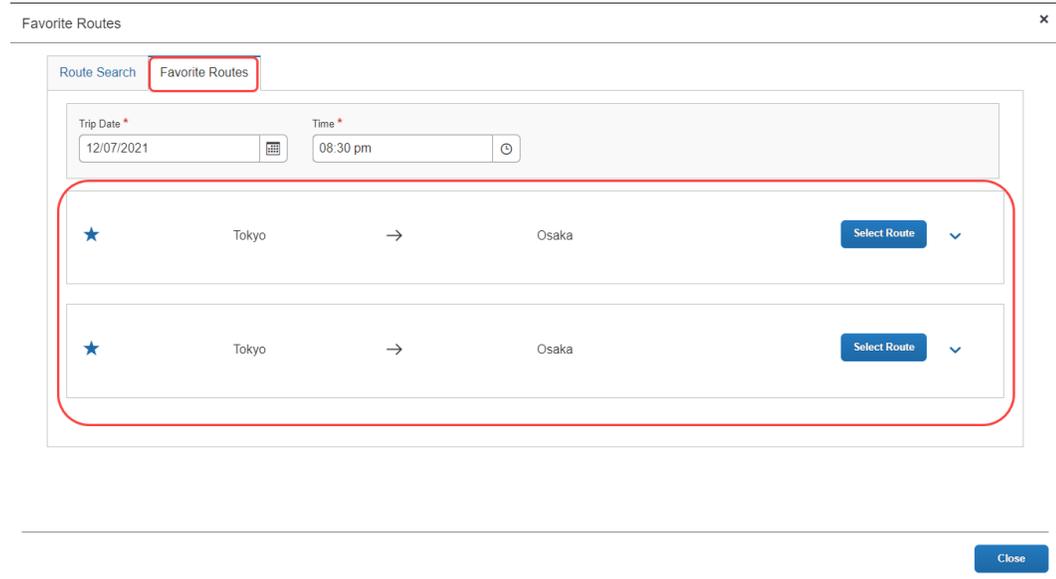
DELETING A FAVORITE ROUTE FROM THE FAVORITE ROUTES TAB

Users can delete a favorite route from the **Favorite Routes** tab by clicking the star icon to remove it as a favorite.



Section 3: What the Employee Sees

The **Favorite Routes** tab updates with the favorite route removed.



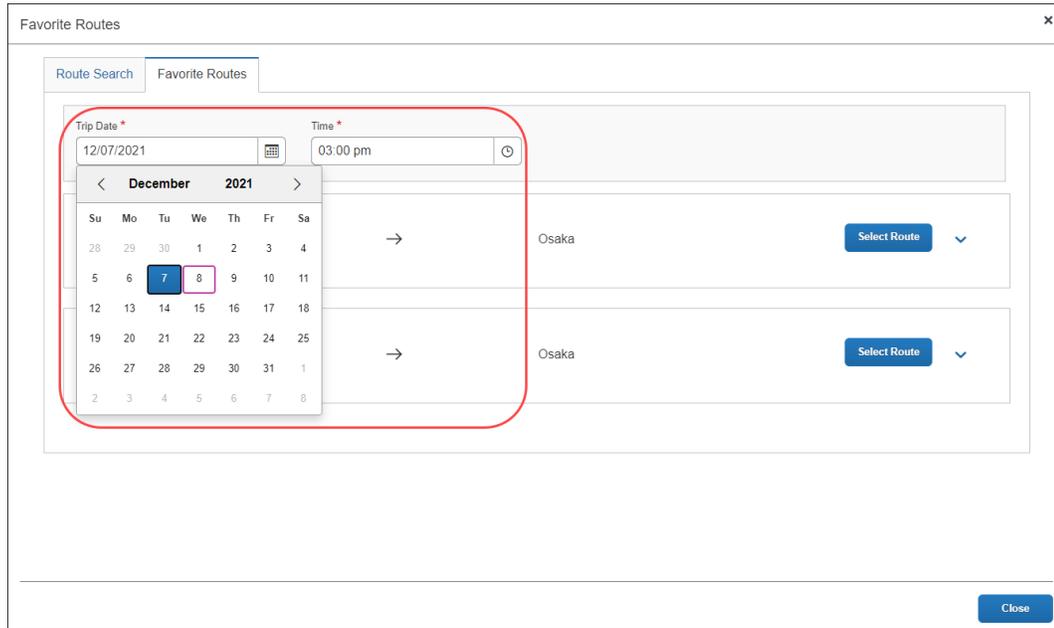
ADDING AN EXPENSE FROM A FAVORITE ROUTE FOR THE REQUESTED TRIP DATE AND TIME

Users can create a JPT expense using the same route, but the route's date and time changes based on the date and time traveled. Users can save time by providing route stations and route search conditions (such as seat type), and then select the target route. They want to reuse these route search conditions and route (same departure and arrival stations and lines) to create a new JPT expense.

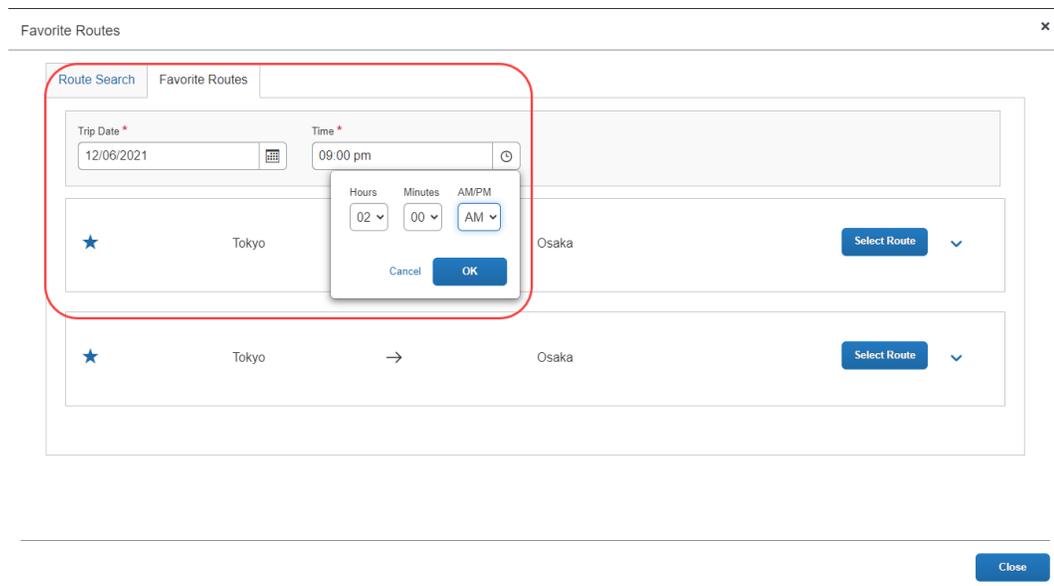
When providing the date and time, the user may not know the precise time of the departure or arrival, for example. However, when adding a JPT expense from a favorite route for the requested trip date and time, Concur Expense will automatically update the expense report using your favorite route's adjusted date and time.

Section 3: What the Employee Sees

On the **Favorite Routes** tab, users can configure the trip date and time. In this example, the user selects the date.



Once the user selects the date, they then provide an approximate time for when they think took the favorite route.



Section 3: What the Employee Sees

The user selects the route from the **Favorite Routes** tab, with the trip date and time (they provided) applied.

Favorite Routes

Route Search Favorite Routes

Trip Date * 12/06/2021

Time * 02:00 am

★ Tokyo → Osaka Select Route

★ Tokyo → Osaka Select Route

Close

Section 3: What the Employee Sees

On the expense report page, the user can view the route details that have been pre-populated from the route search then click **Route Details** at the top of the report to view the selected route's details.

Japan Public Transportation JPY 13,870  Cancel Save Expense

12/06/2021

Details

Route Search Route Details

* Required field

Expense Type
Japan Public Transportation

Transaction Date: 12/06/2021
Business Purpose:
Vendor Description:
City:

Payment Type *
Cash

Amount: 13,870
Currency: Japan, Yen
Exchange Rate *: 1 JPY = 0.66770309 INR
Amount in INR: 9,261.04

Comment

Total Route Distance (km): 560.7
Additional Charges: JPY 4,960

Route Details:
Trip: One Way Trip
Ticket: IC Card

Departure Station *
Tokyo

Arrival Station *
Osaka

Source
Route Search

Save Expense Save and Add Another Cancel

Section 3: What the Employee Sees

If the trip's departure date and time are different than the favorite route's date and time specified by the user, Concur Expense will automatically adjust the time in the **Route Details** window. In the previous example, the user had entered a 2:00 a.m. departure date, but Concur Expense updated the departure time to the correct time (of 4:55) from the actual route data.

The screenshot displays the 'Route Details' window for a trip from Tokyo to Osaka. The window is overlaid on a larger 'Japan Public Transportation' form. The route summary at the top shows a departure of 04:55 from Tokyo and an arrival of 08:27 in Osaka, with a total cost of JPY 13,870 and a duration of 3 hr 32 min / 560.7 km. Below this, a detailed stop list is provided:

Station	Line	Duration / Stops	Distance	Arrival	Departure	Cost
Tokyo					04:55	JPY 8,910
JR-Keihin-Tohoku-Negishi-Line for Ofuna		37 min / Stops: 12 / 27.0 km				
Higashi-Kanagawa				05:32	05:35	
JR Yokohama-Line for Hachioji		9 min / Stops: 2 / 6.1 km				
Shin-Yokohama				05:44	06:00	Non-Reserved: JPY 4,960
JR Shinkansen Hikari 533		2 hr 12 min / Stops: 4 / 523.8 km				
Shin-Osaka				08:12		

The 'Route Details' window also includes a 'Close' button at the bottom right. The background form shows the transaction date as 12/06/2021, the amount as 13,870, and the payment type as 'Cash'. The total route distance is 560.7 km, and there are additional charges of JPY 4,960. The route details are noted as 'Trip: One Way Trip' and 'Ticket: IC Card'.

NOTE: If the favorite route is associated with a commuter pass, you will see **Commuter Pass Deduction** for the **Pass** information.

Japan Public Transportation ¥14,038 Cancel Save Expense
 11/30/2021

Details

Q Route Search | [Route Details](#)

Expense Type * Required field
 Japan Public Transportation

Transaction Date: 11/30/2021
 Business Purpose:
 Vendor Description:
 City:

Payment Type *
 Cash

Amount: 14,038
 Currency: Japan, Yen

Comment:

Total Route Distance (km): 569.4
 Departure Station *: Tokyo
 Arrival Station *: Osaka
 Source:

Additional Charges: ¥4,960
 Route Details:
 Trip: One Way Trip
 Ticket: IC Card
 Pass: Commuter Pass Deduction

ADDING A FAVORITE VIA STATION ROUTE

Users can add a favorite via station route using the same method for adding a favorite route by clicking the star icon.

Route Search

Route Search | Favorite Routes

Trip Date *: 12/07/2021
 Time *: 09:00 pm
 Trip Type: One-way
 Seat Type: Non-reserved

Departure Station *: Tokyo (Tokyo)
 Arrival Station *: Chiba (Chiba)

Via 1: Osaka (Osaka)
 Via 2:

IC Card Fare

ROUTE RESULTS: Displaying 5 results

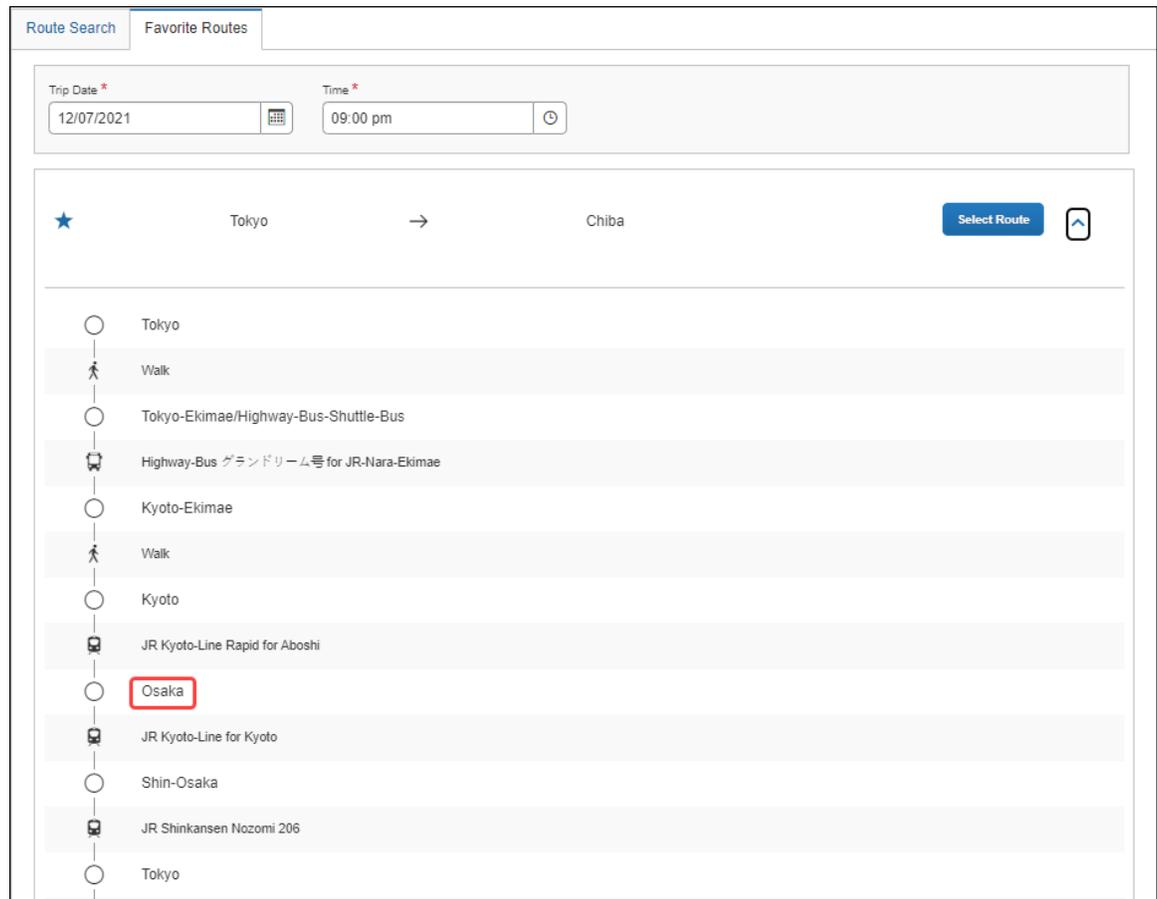
Tokyo (Tokyo) → Osaka (Osaka) → Chiba (Chiba)
 Trip Date: 12/07/2021

Sort By: Cheap

★ 21:30 Tokyo → 10:04 Chiba JPY 25,990

Section 3: What the Employee Sees

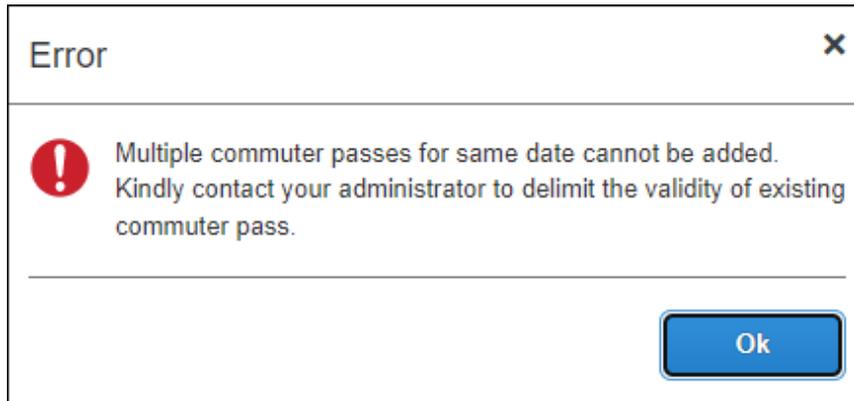
Once added, the favorite via station route will be added to the **Favorite Routes** tab. You can expand the route by clicking the **Show Details** button to display the route's details, which contains the favorite via station.



ADDING A COMMUTER PASS

From **Profile Settings > Commuter Pass Routes**, users can add a commuter pass to their profile that can be applied to a favorite route for a JPT expense.

NOTE: If the commuter pass is not valid, you will see this warning:

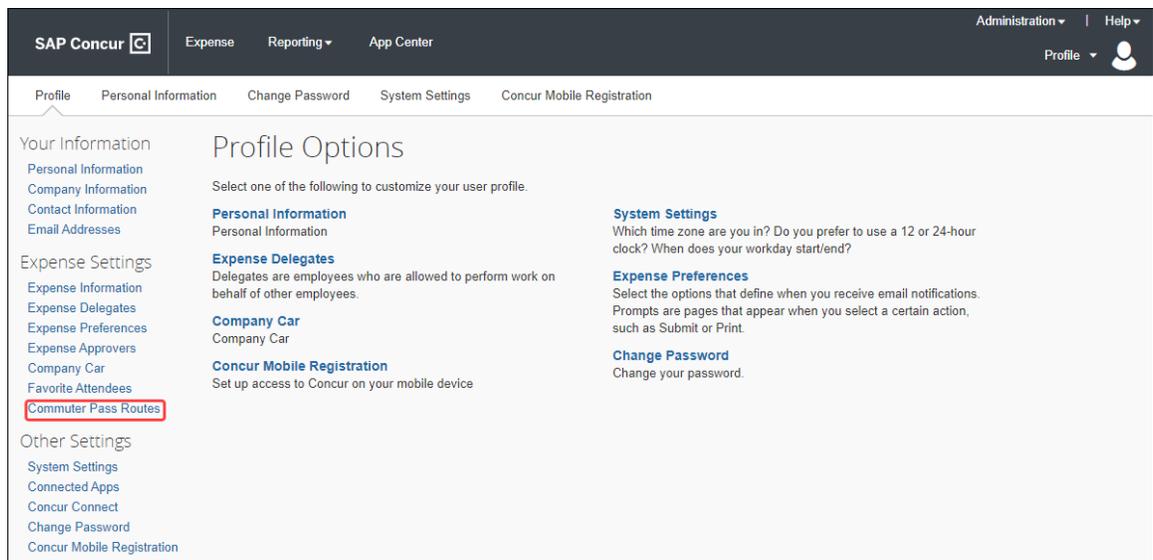


REGISTERING A COMMUTER PASS ROUTE USING ROUTE SEARCH

Users will be able to register a route (for example, from home to work) that they can use regularly when creating a JPT expense. In addition, if the user has a commuter pass registered to their profile, the route will be tied to that route.

The user pays upfront for the commuter pass at the station and will be reimbursed outside of SAP Concur. The expense process is typically facilitated through their HR system via reimbursement in their paycheck. For SAP Concur, this ensures the user is not double-reimbursed in SAP Concur.

On the **Commuter Pass Routes** page of **Profile Settings**, users may add a commuter pass route. If a user needs to change the end date of their commuter pass, they must contact Concur Admin to configure the end date of the commuter pass.



Section 3: What the Employee Sees

Users will search for and add the route. If necessary, they can also add four via stations.

Start Date *
2022/04/13

Departure Station *
[Dropdown]

Arrival Station *
[Dropdown]

Via 1
[Dropdown]

Via 2
[Dropdown]

Via 3
[Dropdown]

Via 4
[Dropdown]

Search

Once the route is selected, it is added to the user's **Commuter Pass** page.

SAP Concur Expense App Center

Profile Personal Information Change Password System Settings Concur Mobile Registration

Commuter Pass

Add Delete

Reference	From Station	To Station	Start Date	End Date	Date Added	
<input type="checkbox"/>	渋谷 東京 / ト 日 根 座 繰 . Up . 新 橋 . J R 山 手 線 内 回 り . Down . 東京	Shibuya	Tokyo	04/28/2021	12/31/9999	04/28/2021

1

Once a commuter pass route is added, the route search results will feature a **Commuter Pass** designation when the route meets the commuter pass route's criteria, including the precise transfer stops if applicable.

Route Search

Trip Date * 05/09/2021 Time * 03:00 pm Trip Type One-way Express Fare Non-reserved

Departure Station * Tokyo (Tokyo) Arrival Station * Ginza (Tokyo)

+ Add Via Stations

Search IC Card Fare

ROUTE RESULTS: Displaying 5 results.

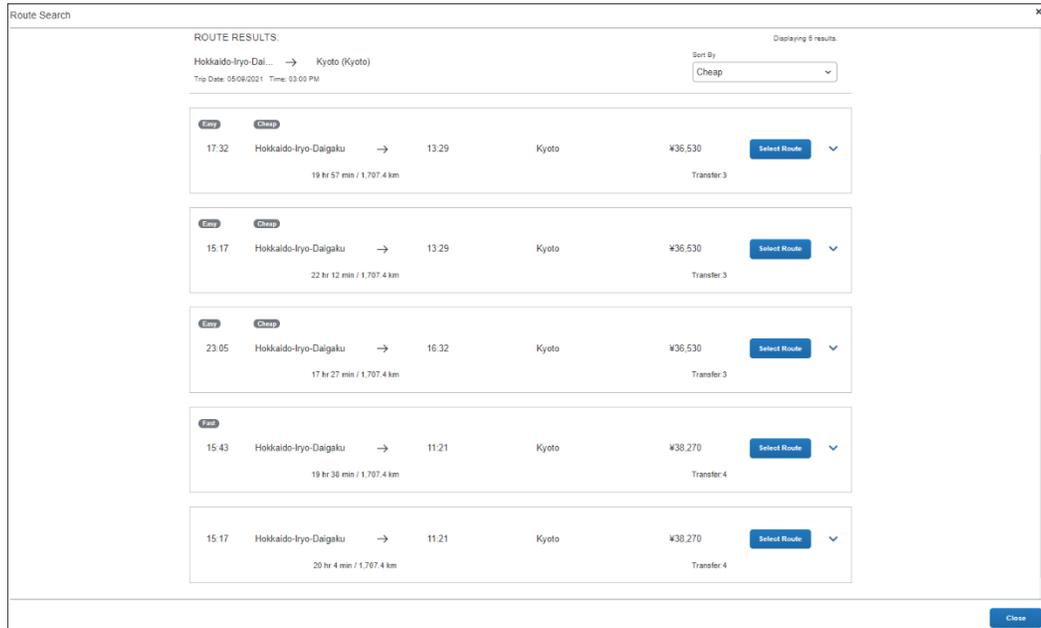
Tokyo (Tokyo) → Ginza (Tokyo) Sort By Cheap

Trip Date: 05/09/2021 Time: 03:00 PM

Fast	Easy	Cheap	Commuter Pass	15:01	Tokyo	→	15:03	Ginza	¥0	Select Route
0 hr 2 min / 1.1 km Transfer: 0										
Easy	Cheap	Commuter Pass		15:05	Tokyo	→	15:07	Ginza	¥0	Select Route
0 hr 2 min / 1.1 km Transfer: 0										

Section 3: What the Employee Sees

If a user selects a route not associated with their commuter pass, the **Commuter Pass** designation will not appear.



Section 4: What the Approver Sees

If the user selects a route that partially or entirely matches their registered commuter pass route, there will be a fare deduction. If the entire route matches their registered commuter pass, the total fare will be zero.

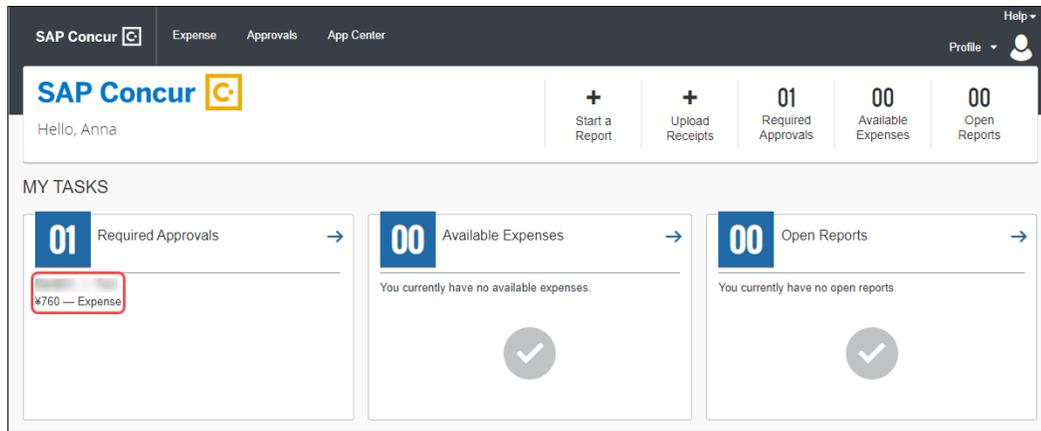
The screenshot displays a web form for entering a Japan Public Transportation expense. At the top, it shows 'Japan Public Transportation ¥0' and the date '05/09/2021'. Below this is a 'Details' tab and navigation links for 'Allocate', 'Route Search', and 'Route Details'. The form includes several fields: 'Expense Type' (Japan Public Transportation), 'Transaction Date' (05/09/2021), 'Country' (JAPAN (JP)), 'Business Purpose', 'Enter Vendor Name', 'Payment Type' (Cash), 'Amount' (0), 'Currency' (Japan, Yen), and 'Receipt Status' (No Receipt). The 'Amount' field is highlighted with a red border.

Section 4: What the Approver Sees

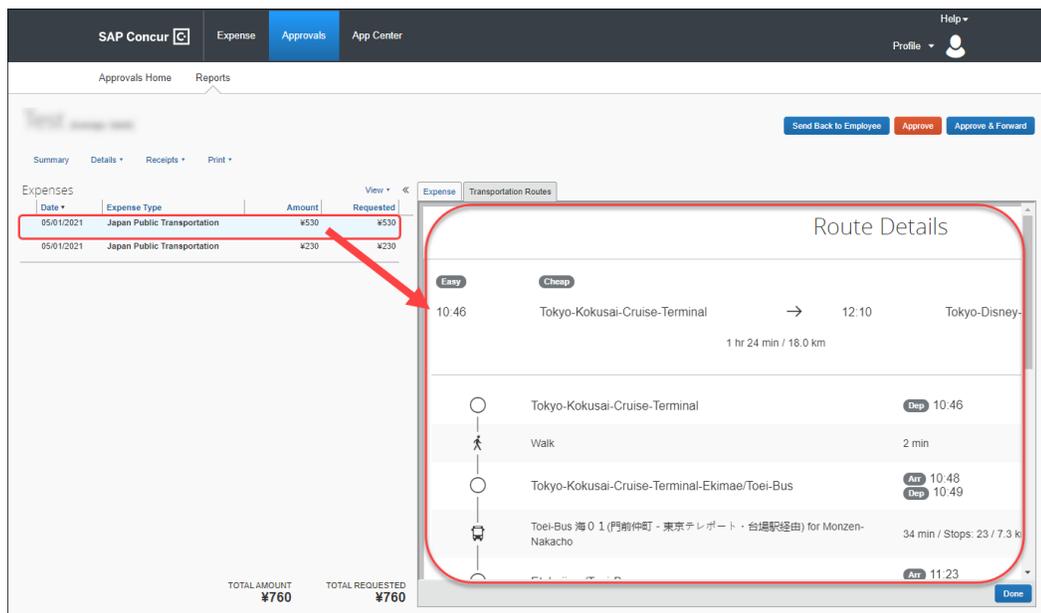
PROCESSING A JAPAN PUBLIC TRANSPORTATION ROUTE SEARCH EXPENSE

On the home page in the **Required Approvals** section of **My Tasks**, approvers can view and select a report which has JPT expense to review and approve. Approvers can view and select a report on the "Process Reports" screen.

Section 4: What the Approver Sees



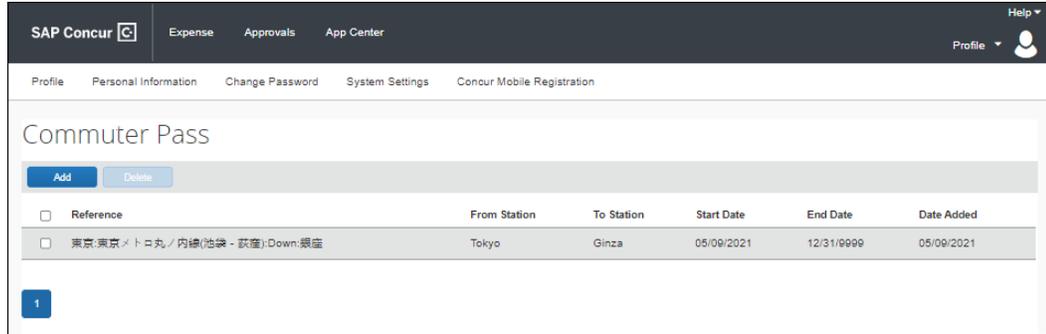
When the expense is selected, approvers can view the journey's route details; this gives them the opportunity to verify if the route complies with the organization's travel policy.



Section 5: What the Administrator Sees

ADDING A COMMUTER PASS

Approvers can also add a commuter pass but are restricted. If an approver or admin needs to change the end date of their commuter pass, they must contact Concur Admin to configure the end date of the commuter pass.

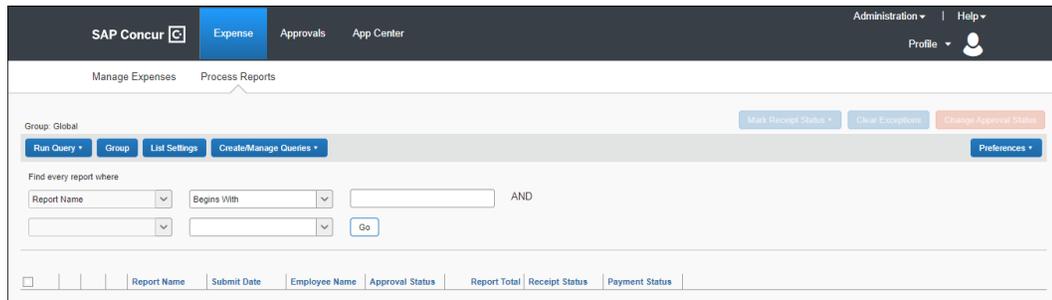


Section 5: What the Administrator Sees

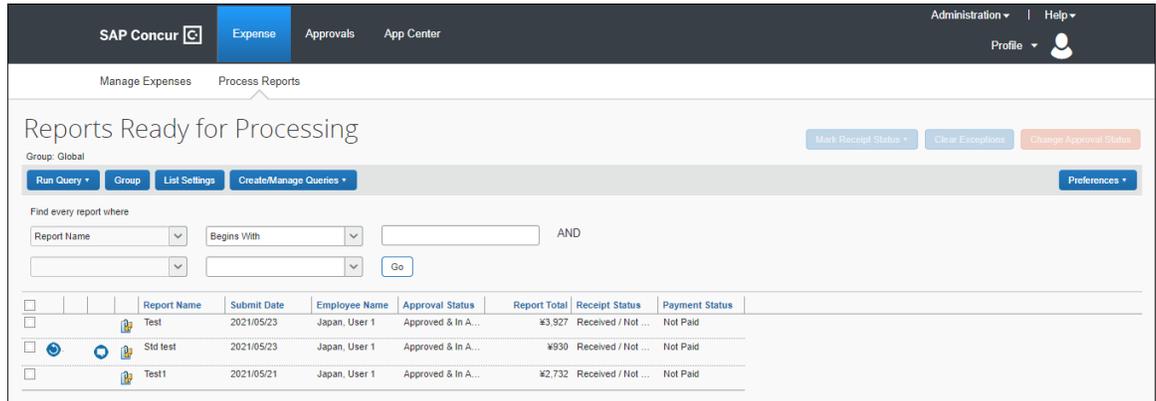
Admin can process JPT expenses as expected and can configure a commuter pass added by a user and manage commuter passes on behalf of users.

PROCESSING A JAPAN PUBLIC TRANSPORTATION ROUTE SEARCH EXPENSE

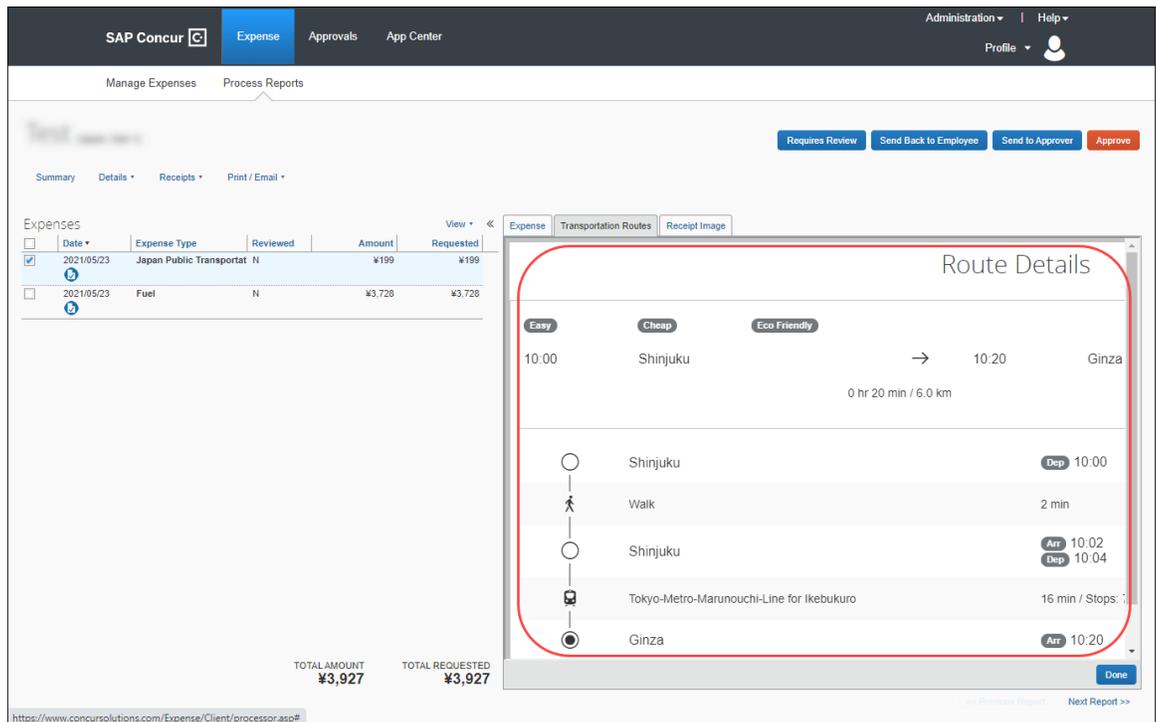
From **Expense > Process Reports** page, Admin searches for the corresponding expense tied to a JPT expense.



EXAMPLE OF REPORTS READY FOR PROCESSING SEARCH RESULTS



By default, once the expense report is selected, the route details of that JPT expense displays.



Admin then approves the expense report if no further actions are required (for example, Requires Review, Send Back to Employee, or Send to Approver).

MANAGING THE COMMUTER PASS

Concur Admin can configure the settings of a user's commuter pass. For example, a user cannot configure the expiry date of their commuter pass, so they must contact their Concur Admin to change the end date for them. When Concur Admin adds an end date, the user can then add another commuter pass. Admin can export commuter pass information to Microsoft Excel. Prior to configuring the commuter

Section 5: What the Administrator Sees

pass, Concur Admin must update the **Concur Admin** settings to disable the **Simple Setup Wizard for Expense** option.

The screenshot shows the SAP Concur Admin interface. The top navigation bar includes 'SAP Concur', 'Expense', 'Reporting', and 'App Center'. Below this, the 'Expense Settings' page is displayed for a specific 'Company'. The 'Concur Admin' section contains a 'Save' button and several configuration options. The 'General' section includes 'Setup Wizard Controls the Accounting Extract File Formats' (checked), 'Enable self-education' (checked), 'Enable Service Assistant' (unchecked), and 'WalkMe Tour Type' (set to 'None'). The 'Expense' section includes 'Enable eReceipts for Japan' (unchecked), 'Enable the Custom Approval Routing workflow option' (unchecked), 'Enable Cash Advance' (unchecked), 'Enable Custom Audit Rules' (unchecked), 'Enable Japan Public Transportation' (checked), 'Enable Mileage Reimbursement by Policy Group' (unchecked), 'Enable Travel Allowance for USA' (unchecked), 'Simple Setup Wizard for Expense' (unchecked and highlighted with a red box), 'Enable Mileage Service' (unchecked), and 'Enable Digitalisation' (unchecked). The 'Amex Business Card integration' section includes 'Default Payment Type to be used' (dropdown), 'Enable Amex Business Card integration' (unchecked), and 'Enable Financial Integration' (unchecked).

From the **Commuter Pass Administrator** page (**Administration > Expense > Expense Settings > Capturing Spend > Commuter Passes**), Concur Admin will be able to search and add commuter passes on behalf of the users.

The screenshot shows the 'Commuter Pass Administrator' page. It features a search bar with the text 'Find commuter passes where:' followed by two dropdown menus: 'Login ID' and 'Equals'. A search button is located to the right of the search bar. Below the search bar, there are several buttons: 'Add', 'Delete', 'Save', 'Cancel', and 'Send to Excel'.

Section 5: What the Administrator Sees

Commuter Pass Route

Login ID * Start Date * 04/13/2022

Departure Station * Arrival Station *

Via 1 Via 2

Via 3 Via 4

Concur Admin can also configure commuter pass settings that a user cannot configure. Using the **Find commuter passes where** fields, Concur Admin can search for and select a user whose commuter pass they want to modify.

Commuter Pass Administrator

Find commuter passes where: Login ID Equals

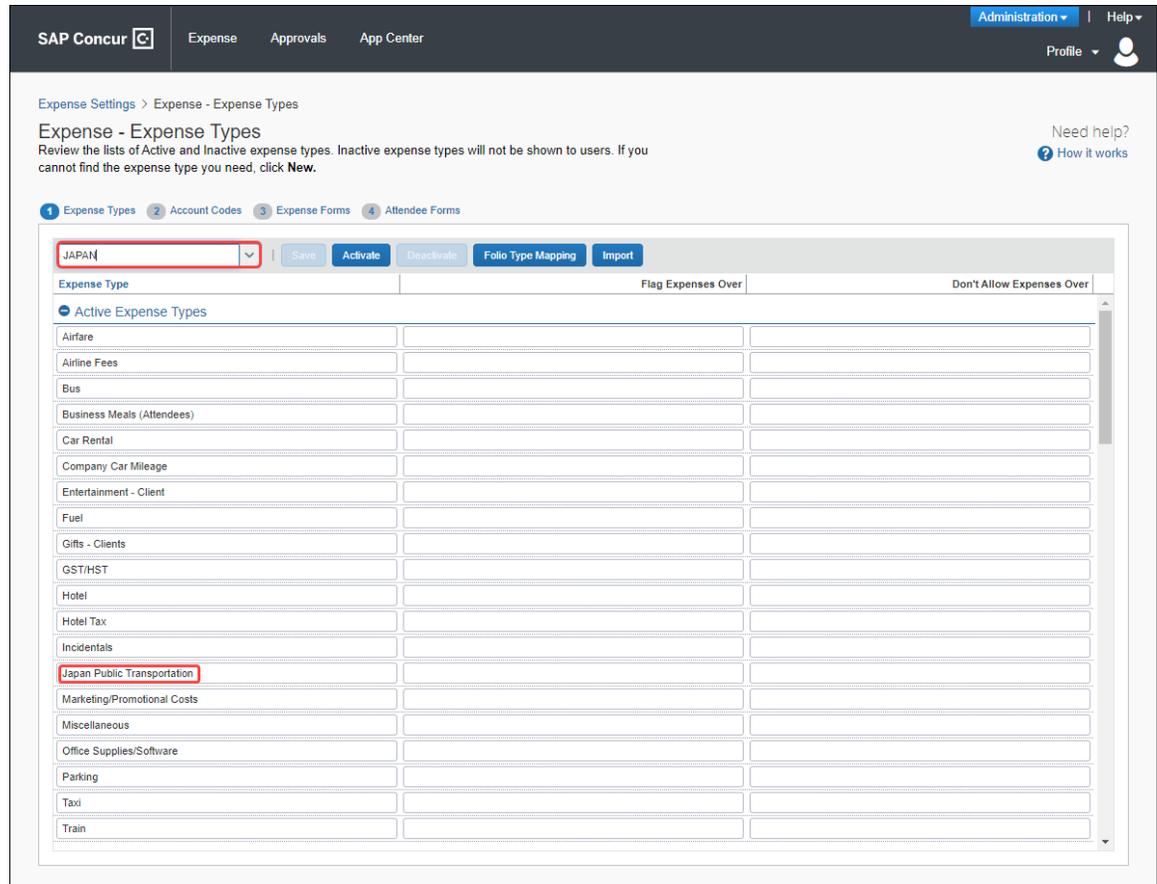
<input type="checkbox"/>	Employee Id	Reference	From Station	To Station	Start Date	End Date	Date Added
<input type="checkbox"/>		東京 J R 山手線外回り :Down: 渋谷	東京	渋谷	06/10/2021	06/16/2021 <input type="text"/>	06/10/2021
<input type="checkbox"/>		渋谷 J R 山手線内回り :Down: 東京	渋谷	東京	06/22/2021	12/31/9999 <input type="text"/>	06/16/2021

For example, a user cannot change the end date of their commuter pass. When a Concur Admin receives the user's request, Concur Admin can then add an end date, allowing the user to add another commuter pass.

Concur Admin can also delete commuter passes and export commuter pass information to Microsoft Excel.

Section 6: Configuring Japan Public Transport

In **Product Settings**, the **Manage Expense Types** page displays the expense type, **Japan Public Transportation**.



Configure JPT

The **Japan Public Transportation** expense type is activated by default for the country of Japan.

► **To configure the JPT feature for users in Japan:**

1. (Optional) In Product Settings, configure policy groups for the country of Japan.
2. (Optional) By default, for all policy groups in Japan, on the **Manage Expense Types** page, the **Japan Public Transportation** expense type is active. Deactivate any groups that should not use this expense type on their expense reports.
3. On the **Manage Account Codes** page, enter an account code for the **Japan Public Transportation** expense type and click **Save**.

4. (Optional) Configure commuter pass routes for existing employees using the **User Information** page of Product Settings.

Managing the Commuter Pass Routes

The admin uses the **Commuter Pass Admin** page to:

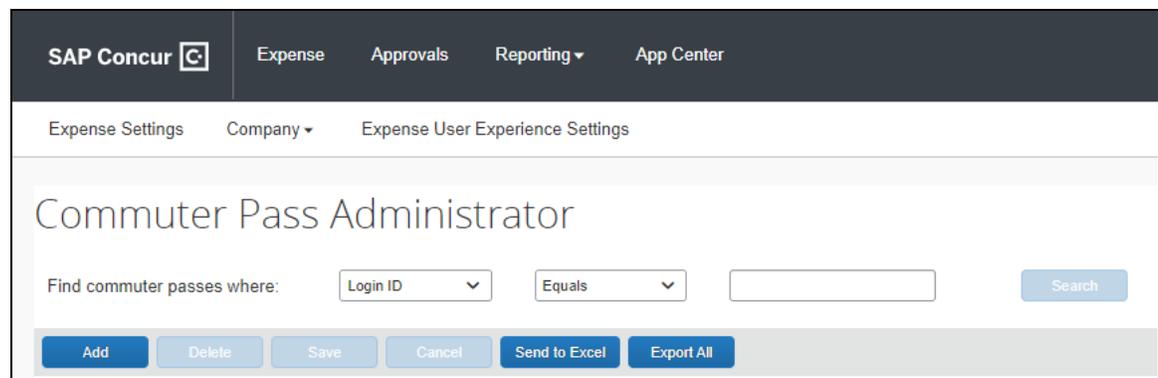
- **Add or remove commuter pass routes for an employee:** By employee, add a route, or select and then delete the route.
- **Manage the ending date of the employee’s commuter pass:** The end date can be edited in the grid and does not appear to the employee.

Searching for Commuter Pass Routes by User

All Commuter pass routes in the Expense system can be accessed from the **Commuter Pass Admin** page. The Search criteria let the administrator search by login ID. Go to **Commuter Pass Administrator** page (**Administration > Expense Settings > Capturing Spend > Commuter Passes**).

A search is performed by selecting from the available criteria and entering the employee’s identification.

Concur Admin can also configure commuter pass settings that a user cannot configure. Using the **Find commuter passes where** fields, Concur Admin can search for and select a user whose commuter pass they want to modify or export.



Concur Admin can also export commuter pass information to Microsoft Excel by pushing Send to Excel button after the commuter pass routes are displayed.

Adding a Commuter Pass Route

Concur Admin will be able to search and add commuter passes on behalf of the user.

► **To enter a route for an employee:**

1. On the **Commuter Pass Administrator** page, click **Add**.

Section 6: Configuring Japan Public Transport

2. On the **Commuter Pass Route** page, provide the **Login ID** for the user you are creating the route for and complete the required fields.

The screenshot shows a web form titled "Commuter Pass Route". It has a search bar for "Login ID" and a date picker for "Start Date" (set to 04/13/2022). Below these are dropdown menus for "Departure Station" and "Arrival Station". There are four more dropdown menus labeled "Via 1", "Via 2", "Via 3", and "Via 4". A blue "Search" button is at the bottom left.

- ◆ **Login ID:** Provide the Login ID of the user.
 - ◆ **Start Date:** Select the date that is the starting date of the commuter pass validated period
 - ◆ **Departure Station:** Enter the route by first specifying the starting station the user will travel.
 - ◆ **Arrival Station:** Enter the route by first specifying the ending station the user will travel.
 - ◆ **(Optional) Via 1-4:** You may optionally specify the station(s) through which the travel should route. You can add up to four Via stations.
3. Click **Search** to return a list of routes validated by the Ekispert service.

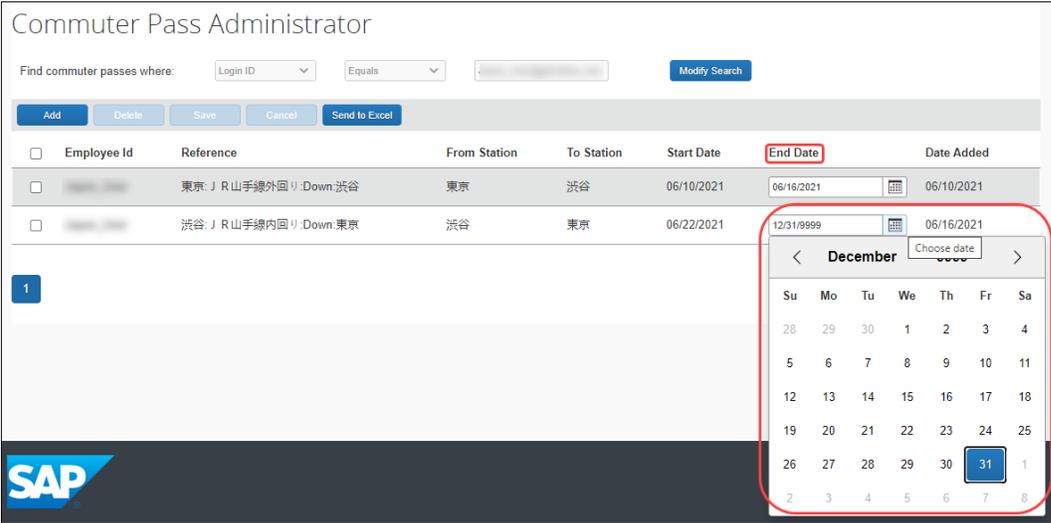
NOTE: If no route is returned, the service cannot find a route that matches the stations – try a different station.

4. In the listed routes, click **Select Route** and then click **Add Commuter Pass**.

The route is added to the user's list of commuter pass routes.

Section 6: Configuring Japan Public Transport

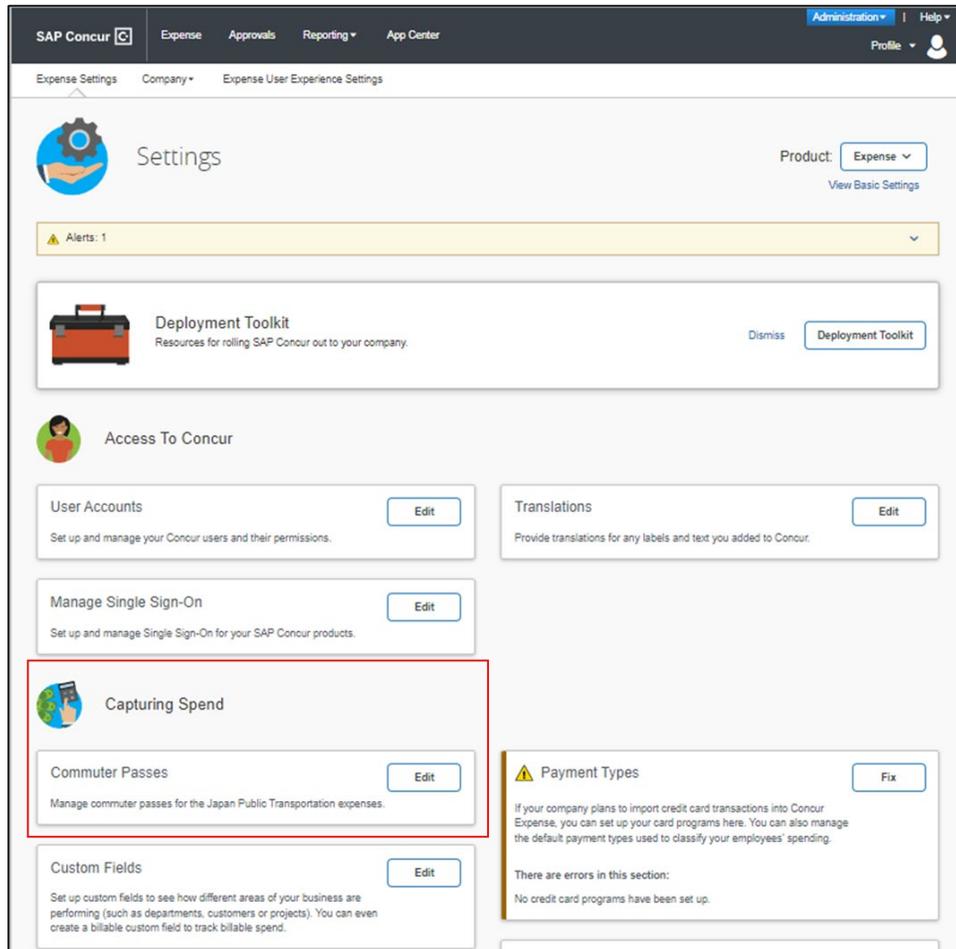
- 5. (Optional): The administrator can now elect to define an end date for the commuter pass routes directly in the grid by clicking in **End Date**.



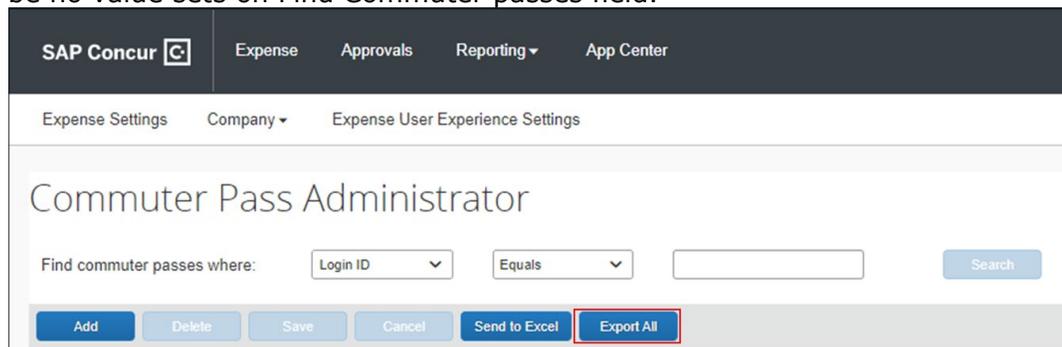
Exporting Commuter Passes

Concur Admin can export all commuter pass information **Administration > Expense Settings > Capturing Spend > Commuter Passes**. This allows the admin to see commuter passes registered in Concur Expense.

Section 6: Configuring Japan Public Transport

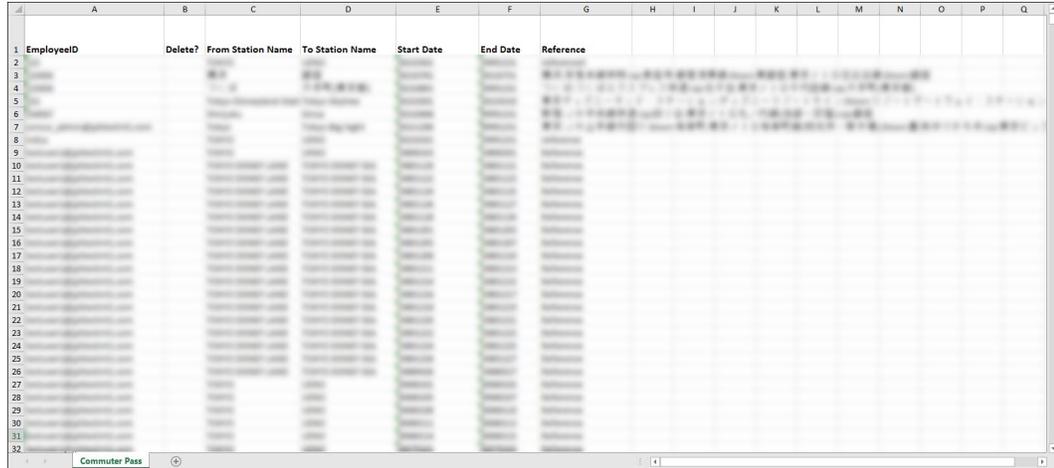


On the **Commuter Pass Administrator** page, Concur admin clicks the **Export All** button to export the commuter pass information to an Excel spreadsheet. All existing commuter passes of JPT on NextGen UI information will be exported and there will be no value sets on Find Commuter passes field.



An Excel spreadsheet is downloaded to their default downloads location and then opens to show commuter pass information, such as the Employee ID, from and to station names, and so forth, for all users with a commuter pass.

EXAMPLE



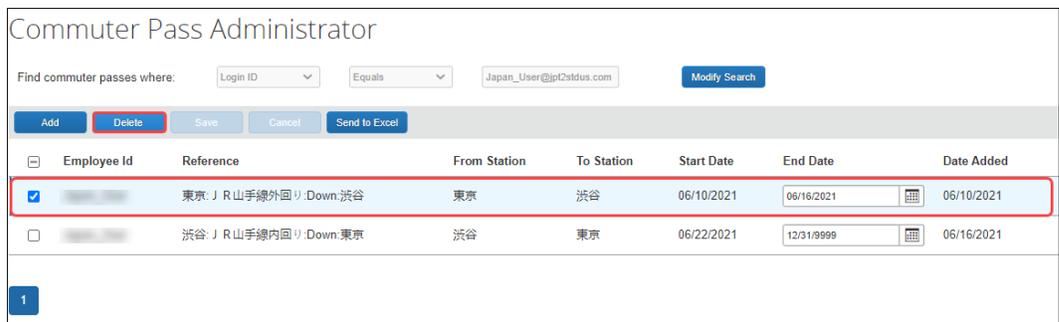
Deleting a Commuter Pass Route

▶ **To delete a commuter pass route:**

1. On the **Commuter Pass Admin** page, search for the Login ID of the user.

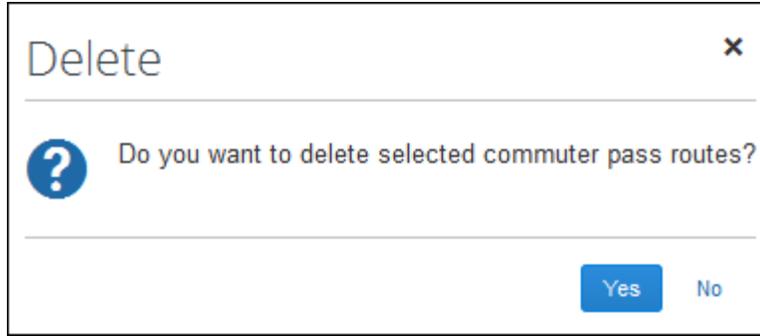


2. In the list of returned routes, select the check box for one or more routes to remove.
3. Click **Delete**.



4. Click **Yes** in the **Delete** message box to complete the deletion of the route.

Section 6: Configuring Japan Public Transport



The route is removed from the user's list of commuter pass routes.

Configure the IC Card reader feature

The easiest, quickest, and most error-free way to add routes to an expense report is to import them into Concur Expense from an employee IC Card. The network IC Card reader device enables users to import their IC Card data into Expense via the Internet. One device per office location is typical.

To use this feature, contact your Concur Expense implementation coach. This feature requires a small implementation project and the purchase and installation of IC Card readers from a specific manufacturer.

About IC Cards

An IC Card is a preloaded commuter card used to enter and exit the rail station gates, thereby capturing the time, date, and route information within the intelligent chip of the IC Card. There are roughly 16 different IC Cards in Japan, SUICA and PASMO being the most popular since they are primarily used by JR (Japan Rail Company) and within Tokyo by close to 40 million people. Each IC Card stores the last 20 transactions.

Configuration Process

The general steps for using this feature include the following:

1. Contact your Concur Client Executive to confirm that you have the following prerequisites: 1) Concur JPT Service; 2) Concur Web Services; and 3) at least one proxy server with a static IP address.
2. For Japanese clients, your Concur Client Executive will organize an implementation project. For global clients, your Concur Client Executive will contact an implementation partner from Fujisoft for the project. You must purchase at least one network IC Card reader device. You may choose to purchase a device for each of your office locations.
3. Once the IC Card reader device is installed, your Implementation manager will complete set up for your company.

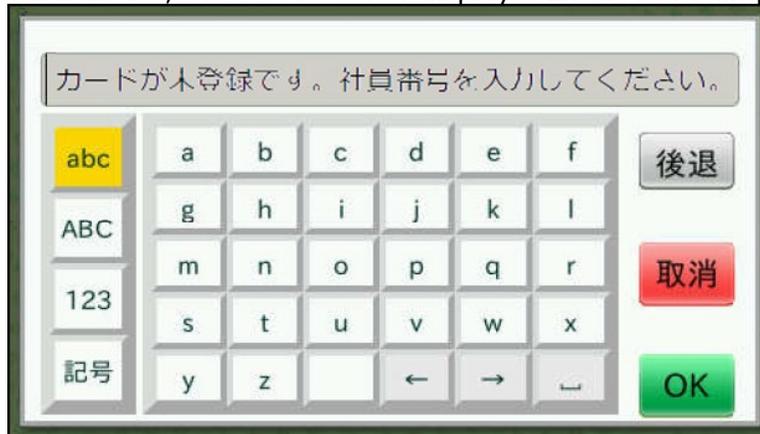
4. The first time a user taps their IC Card on the network IC Card reader device located in their office, they will be prompted to enter their employee ID (not every time, just the first time). After entering their employee ID, their last 19 routes at maximum will be imported into Concur Expense.).

How Expense Works With the IC Card

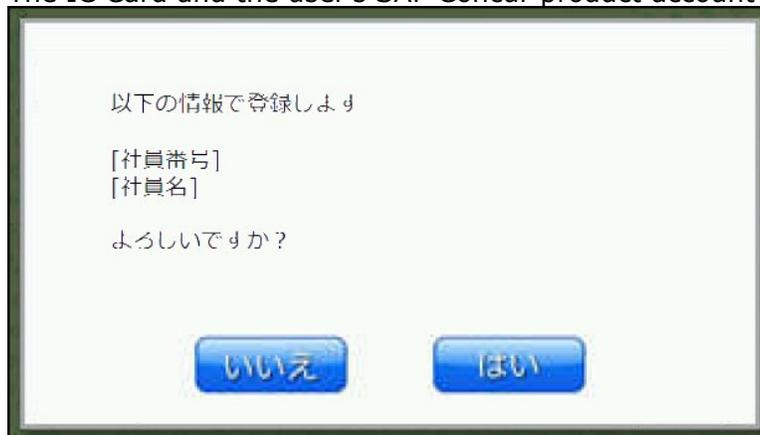
A device should be installed in each Company location. An employee swipes the IC Card on the device. Routes stored on the IC Card are pulled into the Receipt Store and displayed in **Available Expenses** along with any other Smart Expenses.

Associate an IC Card to an employee

After the set up for the company is complete, users need to associate their IC Card to their SAP Concur account. The first-time users tap their IC Card on the network IC Card device, the screen below displays. Enter user's employee ID.



The IC Card and the user's SAP Concur product account are associated.



Section 7: Audit Rules and Japan Public Transport

Audit Rules is a parity feature and can be used to flag the use of Japan Public Transport (JPT). For example, the administrator can generate exceptions based on the source used to enter the Transport route by the JPT traveler. This is used by companies whose specific policy rules restrict how an employee expenses a JPT transaction (which may require a receipt). By raising an exception, these criteria may be enforced at the company policy level.

For the itemized JPT expense audit rules to work both on JPT 1.0 and on JPT on NexGen UI, customer admins should modify audit rules before migrating. In the NextGen UI, only the event **Entry Save** is supported.

The screenshot shows the 'Audit Rules' configuration page. At the top, there are two tabs: 'Custom' and 'Random'. Below the tabs, there are three numbered steps: '1 Audit Rule', '2 Conditions', and '3 Exception'. The '1 Audit Rule' step is active. The form contains the following fields:

- Name: JPT AR1
- Event: Entry Save (highlighted with a red box)
- Editable By: Global
- Applies To: Global
- Active: Yes

The screenshot shows the 'Audit Rules' configuration page. At the top, there are tabs for 'Custom' and 'Random'. Below that, there are three numbered steps: '1 Audit Rule', '2 Conditions', and '3 Exception'. The 'Conditions' step is active. There are 'Insert' and 'Remove' buttons. The main area contains two condition rows. Each row has a checkbox, a dropdown for 'Data Object/Operator' (set to 'Entry'), a dropdown for 'Field/Value' (set to 'Source/Type Classification'), and a dropdown for 'Operation' (set to 'Value'). Below the conditions, there are radio buttons for 'And' and 'Or', with 'Or' selected. There are also checkboxes and dropdowns for each condition row.

The admin can choose from JPT-specific fields display when the feature is enabled on the entity and the Entry object is selected. The choices are as follows:

Field Name	Available Selections for the Field
Source/Type Classification	<p>Identifies the type of input based on the source of the route data used by the JPT traveler:</p> <ul style="list-style-type: none"> • CARD = (IC Card) Route data entered using IC Card • RSRC = (Route Search) Route data entered by search

