

# **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



# Table of Contents

<b>Section 1: Overview .....</b>	<b>1</b>
Who Should Use This Feature .....	1
Required Roles.....	1
<b>Section 2: Accessing Japan Public Transport.....</b>	<b>1</b>
<b>Section 3: What the Employee Sees .....</b>	<b>2</b>
<b>Section 4: What the Approver Sees .....</b>	<b>32</b>
<b>Section 5: What the Administrator Sees .....</b>	<b>34</b>
<b>Section 6: Configuring Japan Public Transport .....</b>	<b>38</b>
Configure JPT .....	38
Managing the Commuter Pass Routes .....	39
Searching for Commuter Pass Routes by User.....	39
Adding a Commuter Pass Route .....	39
Exporting Commuter Passes .....	41
Deleting a Commuter Pass Route .....	43
Configure the IC Card reader feature .....	44
About IC Cards .....	44
Configuration Process .....	44
How Expense Works With the IC Card .....	45
Associate an IC Card to an employee.....	45
<b>Section 7: Audit Rules and Japan Public Transport.....</b>	<b>46</b>

# 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

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**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.

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**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.

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## Section 2: Accessing Japan Public Transport

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

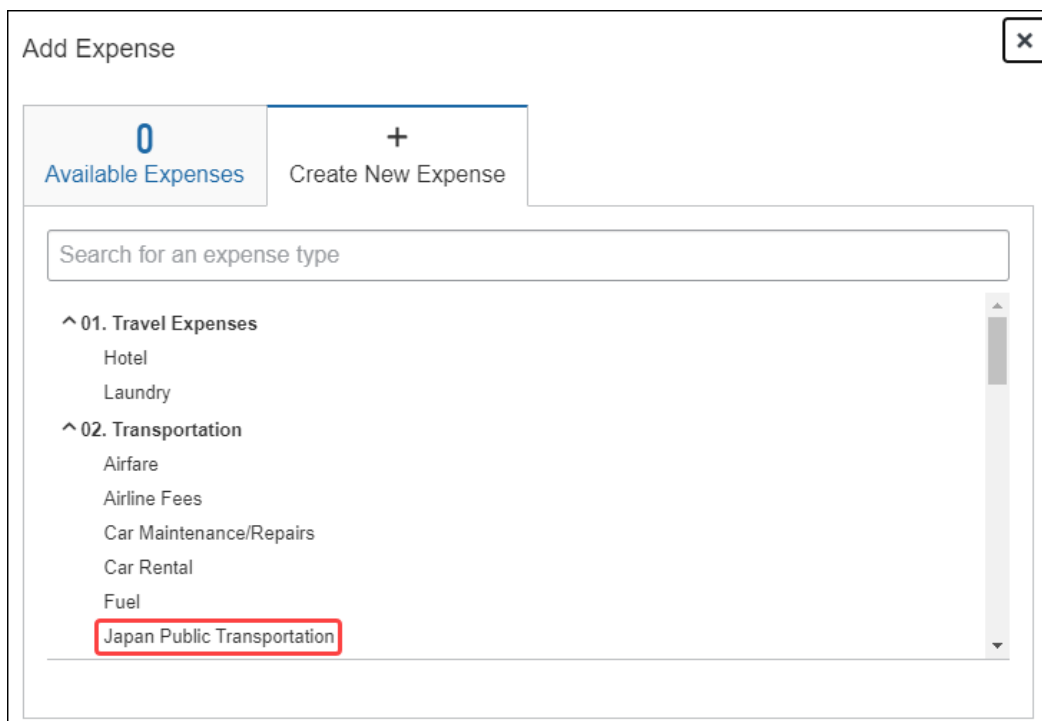
## Section 3: What the Employee Sees

**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

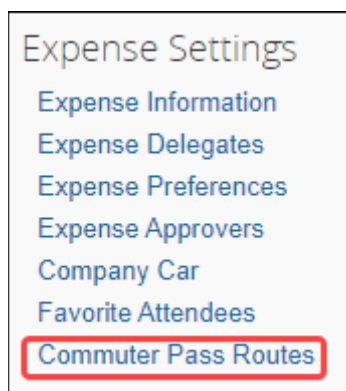
The employee is granted access to the Japan Public Transport (JPT) feature and options in the following areas of Concur Expense:

- **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' dialog box. At the top, it says 'Add Expense' with a close button. Below this, there are two tabs: '0 Available Expenses' and '+ Create New Expense'. Under the '0 Available Expenses' tab, there is a search bar labeled 'Search for an expense type'. Below the search bar, there is a list of expense types. The list is organized into categories: '01. Travel Expenses' (Hotel, Laundry) and '02. Transportation' (Airfare, Airline Fees, Car Maintenance/Repairs, Car Rental, Fuel, 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. It includes links for 'Expense Information', 'Expense Delegates', 'Expense Preferences', 'Expense Approvers', 'Company Car', 'Favorite Attendees', and 'Commuter Pass Routes'. The 'Commuter Pass Routes' link 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 in SAP Concur. The form has a title bar 'Create New Report' with a close button. It contains several input fields: 'Report Name' with a red asterisk and a blue border, containing the text 'Japan Expense Policy'; 'Report Date' with a calendar icon, containing '08/19/2021'; and 'Business Purpose' with a red asterisk and a required field icon. Below these is a dropdown menu for '支店' (Branch) with 'None Selected' chosen. There is a large text area for 'Comment'. At the bottom right are 'Cancel' and 'Create Report' buttons.

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

The screenshot shows the 'Manage Expenses' page in SAP Concur. The top navigation bar includes 'SAP Concur', 'Expense', and 'App Center'. The main content area shows a report titled 'Japan 2021 Conference ¥0' with a trash icon and a 'Submit Report' button. Below the title is the status 'Not Submitted'. There are tabs for 'Report Details', 'Print', and 'Manage Receipts'. A row of buttons includes 'Add Expense', 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. At the bottom, it says '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 'Add Expense' dialog box displays a list of expense types. Under the '02. Transportation' category, 'Japan Public Transportation' is selected and highlighted with a red border.

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 'Route Search' dialog box contains 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)
- Arrival Station: (empty dropdown)
- Via 1: (empty dropdown)
- Via 2: (empty dropdown)
- Search button
- IC Card Fare checkbox (checked)



### 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' window. It contains several 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', both of which are currently empty. A red rectangle highlights both of these dropdown menus. At the bottom, there is a 'Search' button and a checked checkbox for '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.

This screenshot shows the 'Route Search' window with the 'Departure Station' dropdown menu open. A search list is displayed below the dropdown, showing several station names: Shibukawa (Gunma), Shibuki (Yamaguchi), Shibun (Hokkaido), Shibusawa (Kanagawa), Shibushi (Kagoshima), Shibushi-Port (Kagoshima/Wakahama-Chiku-2), Shibutami (Iwate), and Shibuya (Tokyo). The 'Arrival Station' dropdown remains empty. The 'Search' button and 'IC Card Fare' checkbox are still visible at the bottom.

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' window with the 'Departure Station' set to 'Shibuya (Tokyo)' and the 'Arrival Station' set to 'Ginza (Tokyo)'. Below these, there are two new dropdown menus labeled 'Via 1' and 'Via 2', which are highlighted by a red rectangle. A link for '+ Add Via Stations' is visible above these dropdowns. The 'Search' button and 'IC Card Fare' checkbox are at the bottom.

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' window. 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, each with a designation (Fast, Easy, Cheap, or Commuter Pass), departure and arrival times, distance, and fare. Each route has a 'Select Route' button.

Designation	Departure Time	Departure Station	Arrival Time	Arrival Station	Fare	Transfer
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.

ROUTE RESULTS: Displaying 5 results.

Shibuya (Tokyo) → Ginza (Tokyo)  
Trip Date: 05/08/2021 Time: 08:30 PM

Sort By: Cheap

Fast	Easy	Cheap	Commuter Pass						
20:30	Shibuya	→	20:47	Ginza	¥170	Select Route	Transfer:0		
0 hr 17 min / 7.2 km									
Cheap	Commuter Pass	20:30	Shibuya	→	20:48	Ginza	¥170	Select Route	Transfer:1
0 hr 18 min / 6.6 km									
Cheap	Commuter Pass	20:32	Shibuya	→	20:53	Ginza	¥170	Select Route	Transfer:1
0 hr 21 min / 6.6 km									

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.

Route Search

Trip Date: 08/19/2021 Time: 12:00 am Trip Type: One-way Seat Type: Non-reserved

Departure Station: Shibuya (Tokyo) Arrival Station: Ginza (Tokyo)

Via 1: Via 2:

Remove Via Stations

Search IC Card Fare

ROUTE RESULTS: Displaying 1 results.

Shibuya (Tokyo) → Ginza (Tokyo)  
Trip Date: 08/19/2021

Sort By: Cheap

Fast	Easy	Cheap					
00:02	Shibuya	→	00:17	Ginza	¥199	Select Route	Transfer:0
0 hr 15 min / 7.2 km							

Close

### 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", "Route Search", and "Route Details". The "Details" section contains fields for Expense Type, Transaction Date, Country, Business Purpose, Payment Type, Amount, Currency, Receipt Status, and Comment. The "Route Search" section contains fields for Total Route Distance, Departure Station, Arrival Station, and Source. The "Route Details" section contains a list of 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 on the right side of the form.

SAP Concur Expense App Center Help

Manage Expenses

Japan Public Transportation ¥0 05/21/2021

Cancel Save Expense

Hide Receipt

Details

Allocate Route Search Route Details

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

Comment

Total Route Distance (km) 1.1 Departure Station Tokyo Arrival Station Ginza Source Route Search

Additional Charges 0

Route Details:  
Trip: One Way Trip  
Trip Attribute: Fast | Easy | Cheap  
Ticket: IC Card  
Pass: Commuter Pass  
Deduction

Save Expense Cancel

Upload Receipt Image

**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 web form for entering expense details. At the top, it says 'Japan Public Transportation ¥170' with a trash icon and the date '05/08/2021'. Below this is a 'Details' tab. There are three tabs: 'Allocate', 'Route Search', and 'Route Details'. The 'Expense Type' field is highlighted with a red box and contains 'Japan Public Transportation'. Below this are fields for 'Transaction Date' (05/08/2021), 'Country' (JAPAN (JP)), 'Business Purpose', 'Enter Vendor Name', and 'Payment Type' (Cash). A red asterisk indicates a required field.

Additional information about JPT expense details page:

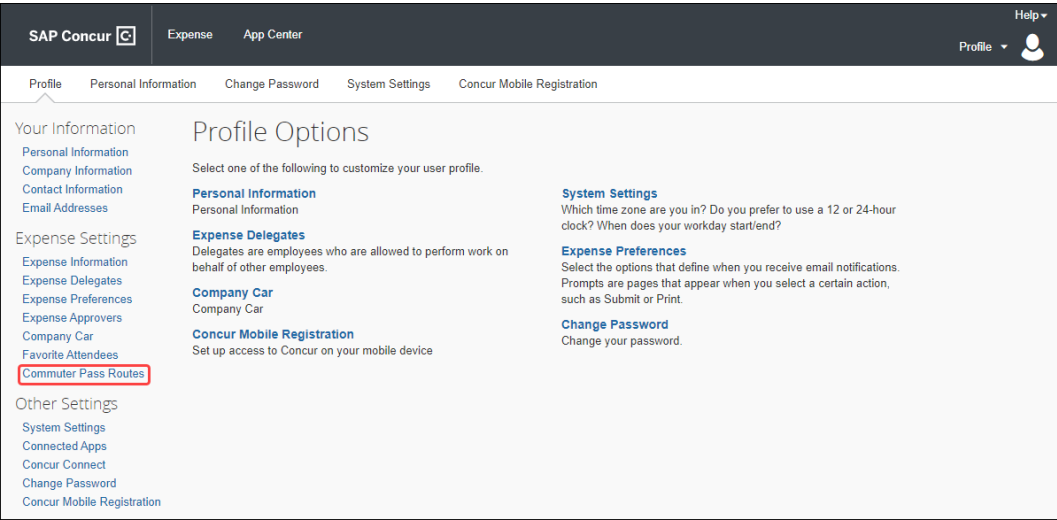
- Users cannot edit the **Transaction Date** field, as the date is extracted from the route search.
- The **Country** field always defaults to **JAPAN (JP)** given the travel will always occur in Japan.
- The **Currency** field will always default to the reimbursement currency configuration that is mapped 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.



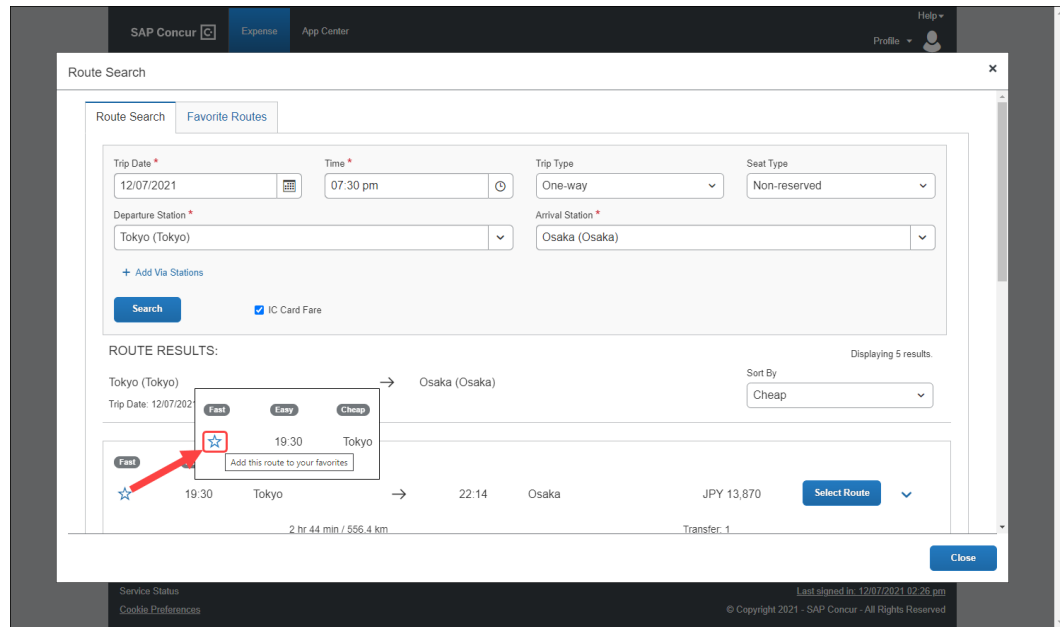
ADDING A FAVORITE ROUTE

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.

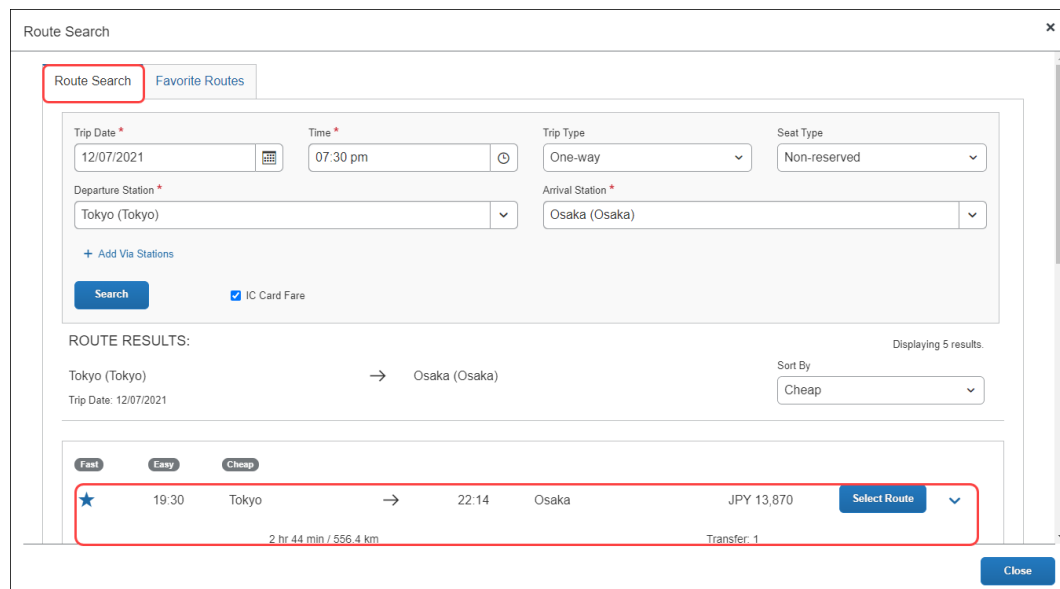
**NOTE:** Currently, there is no limit to the number of routes you can add to the Favorite Routes tab.

### 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 route is favorited (the star changes from clear to blue) and added to the **Favorite Routes** tab.



### Section 3: What the Employee Sees

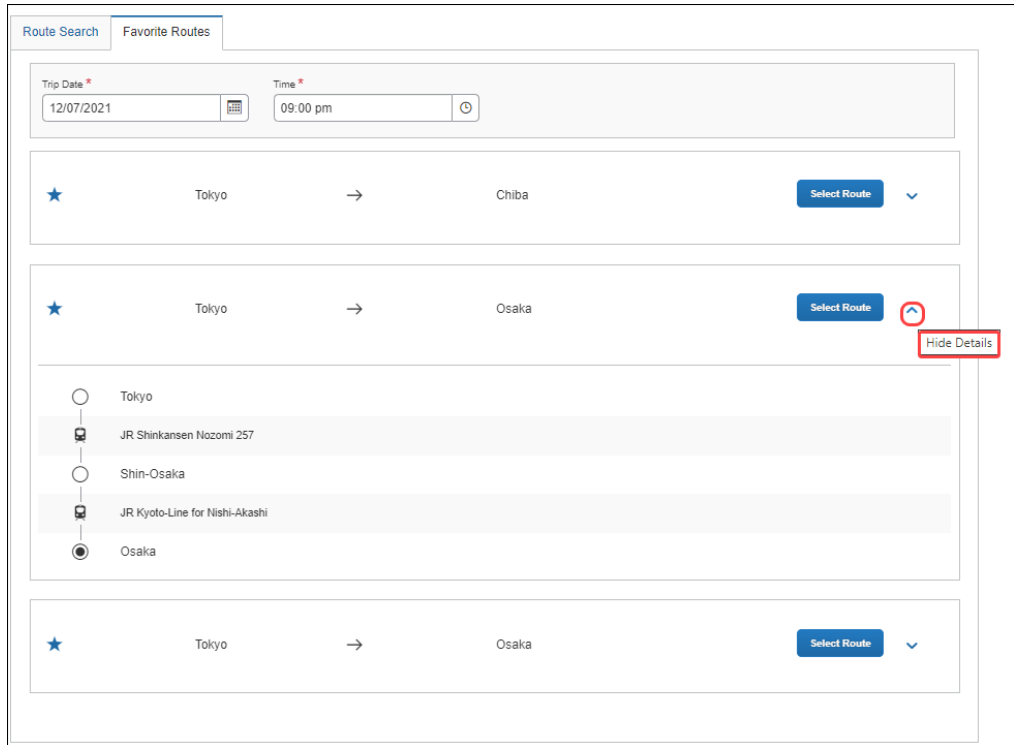
The screenshot shows a 'Favorite Routes' dialog box with a close button (X) in the top right corner. Inside the dialog, there are two tabs: 'Route Search' and 'Favorite Routes', with the latter being selected and highlighted by a red box. Below the tabs, there are two input fields: 'Trip Date \*' with the value '12/07/2021' and a calendar icon, and 'Time \*' with the value '08:00 pm' and a clock icon. Below these fields, there is a red-bordered box containing a blue star icon, the text 'Tokyo', a right-pointing arrow, the text 'Osaka', a blue 'Select Route' button, and a downward-pointing chevron. At the bottom right of the dialog is a blue 'Close' button.



**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

Cancel Save Expense

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.

Japan Public Transportation JPY 13,870 

Cancel **Save Expense**

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 

Reverse

 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

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15

## 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' interface. The top navigation bar includes 'SAP Concur', 'Expense', and 'App Center'. Below this, there are links for 'Manage Expenses' and 'Process Reports'. The main heading is 'New Expense'. On the right side of the heading, there are 'Cancel' and 'Save Expense' buttons. The 'Details' tab is selected, displaying a form for 'Expense Type'. The form has a search bar with the placeholder text 'Search for an expense type' and a dropdown arrow. Below the search bar, there are three buttons: 'Save Expense', 'Save and Add Another', and 'Cancel'. The footer of the page 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 'Favorite Routes' dialog box 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, a 'Select Route' button, and a dropdown arrow. The first route is Tokyo to Chiba. The second route, Tokyo to Osaka, is highlighted with a red box. The third route is also Tokyo to Osaka. A 'Close' button is at the bottom right.

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 says 'Japan Public Transportation JPY 25,990' with a trash icon and '12/08/2021'. There are 'Cancel' and 'Save Expense' buttons. Below this is a 'Details' tab. Under the 'Details' tab, there are two sub-tabs: 'Route Search' and 'Route Details', with 'Route Details' being selected. The form contains several fields: 'Expense Type' (Japan Public Transportation), 'Transaction Date' (12/08/2021), 'Business Purpose', 'Vendor Description', 'City' (dropdown), 'Payment Type' (Cash), 'Amount' (25,990), 'Currency' (Japan, Yen), 'Exchange Rate' (1 JPY = 0.66416351 INR), and 'Amount in INR' (17,261.61). There is a 'Comment' field. At the bottom, there are fields for 'Total Route Distance (km)' (1121.7), 'Departure Station' (Tokyo), 'Arrival Station' (Chiba), and 'Source' (Route Search). There are also 'Save Expense', 'Save and Add Another', and 'Cancel' buttons at the bottom.

### 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' and 'Process Reports' tabs at the top. The main header displays 'Japan Public Transportation JPY 25,990' with a trash icon and a 'Cancel' button. A 'Save Expense' button is in the top right. Below the header, there's a 'Details' tab and a 'Route Search' link. The form contains several input fields: 'Expense Type' (Japan Public Transportation), 'Transaction Date' (12/08/2021), 'Business Purpose', 'Vendor Description', 'City' (dropdown), 'Payment Type' (Cash), 'Amount' (25,990), 'Currency' (Japan, Yen), 'Exchange Rate' (1 JPY = 0.66416351 INR), '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), and 'Route Details' (Trip: One Way Trip, Ticket: IC Card). At the bottom, there are three buttons: 'Save Expense', 'Save and Add Another', and 'Cancel'.

Manage Expenses Process Reports

Japan Public Transportation JPY 25,990 Cancel **Save Expense**

12/08/2021

Details

[Route Search](#) | [Route Details](#)

\* Required field

Expense Type  
Japan Public Transportation

Transaction Date  
12/08/2021

Business Purpose

Vendor Description

City

Payment Type \*  
Cash

Amount  
25,990

Currency  
Japan, Yen

Exchange Rate \*  
1 JPY = 0.66416351 INR

Reverse

Amount in INR  
17,261.61

Comment

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

**Save Expense** | **Save and Add Another** 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.

Route Search
×

Route Search
Favorite Routes

Trip Date \*
12/07/2021

Time \*
08:30 pm

Trip Type
One-way

Seat Type
Non-reserved

Departure Station \*
Tokyo (Tokyo)

Arrival Station \*
Chiba (Chiba)

+ Add Via Stations

Search
☒ IC Card Fare

ROUTE RESULTS:

Tokyo (Tokyo)
→
Chiba (Chiba)

Trip Date: 12/07/2021

Sort By
Cheap

Cheap

★
20:38
Tokyo
→
21:36
Chiba
JPY 591
Select Route

0 hr 58 min / 39.3 km
Transfer: 2

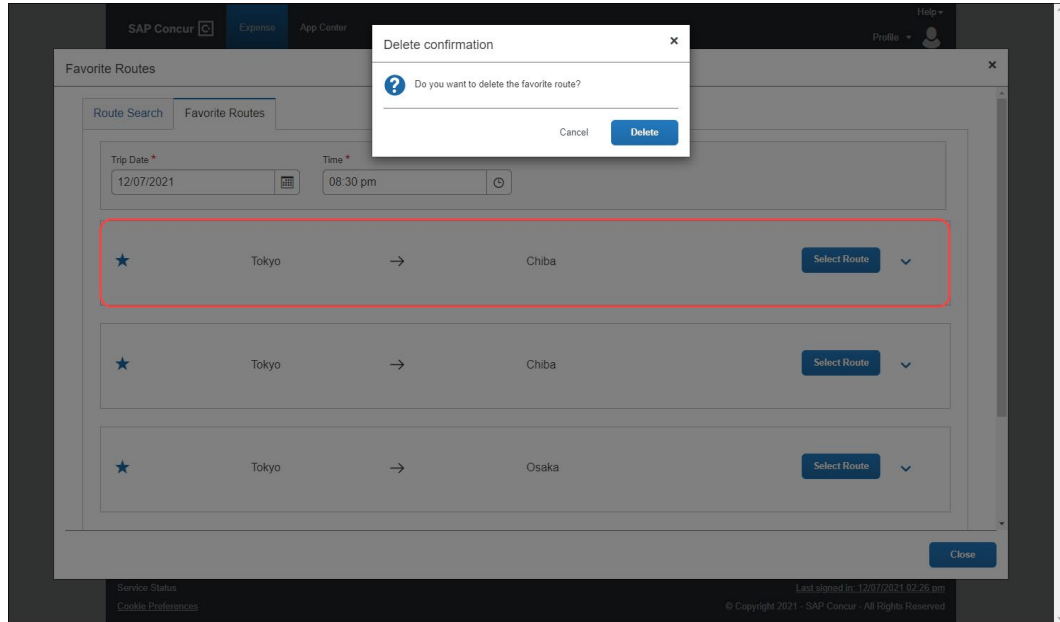
Close

## Section 3: What the Employee Sees

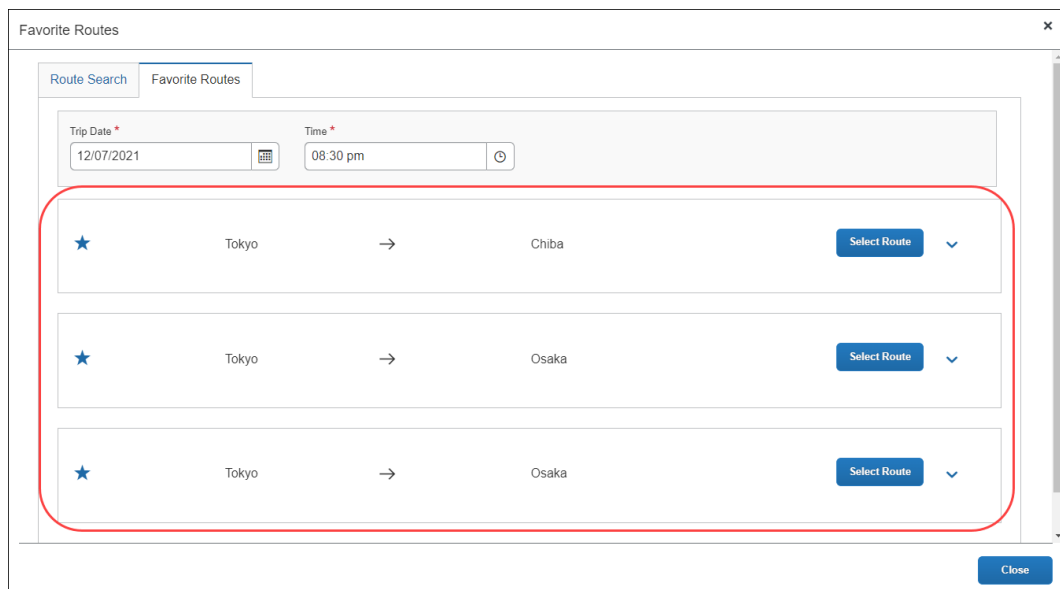
### DELETING A FAVORITE ROUTE FROM THE FAVORITE ROUTES TAB

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.



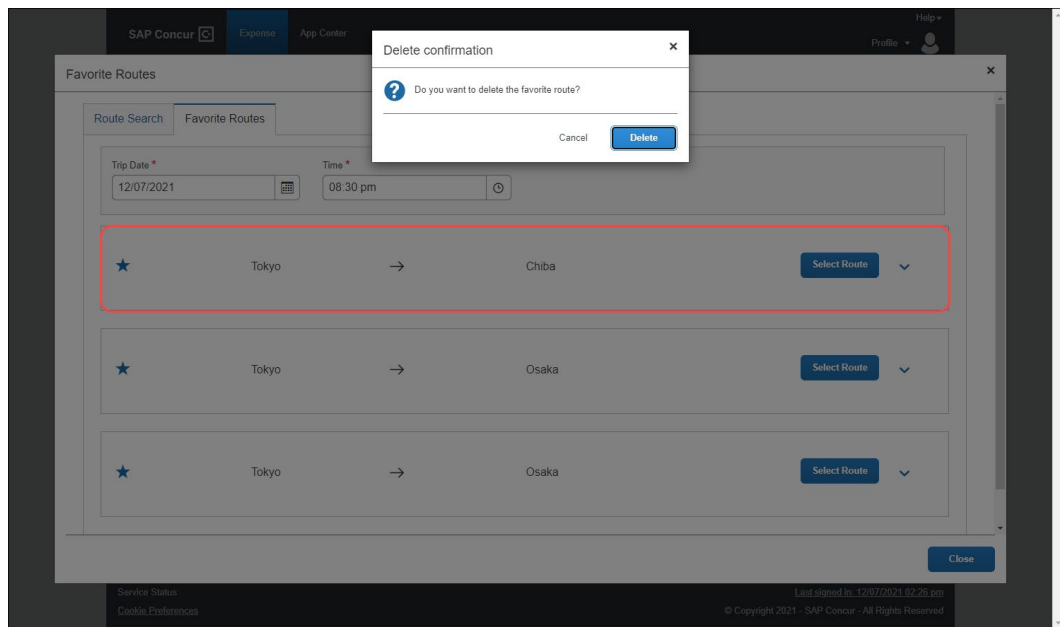
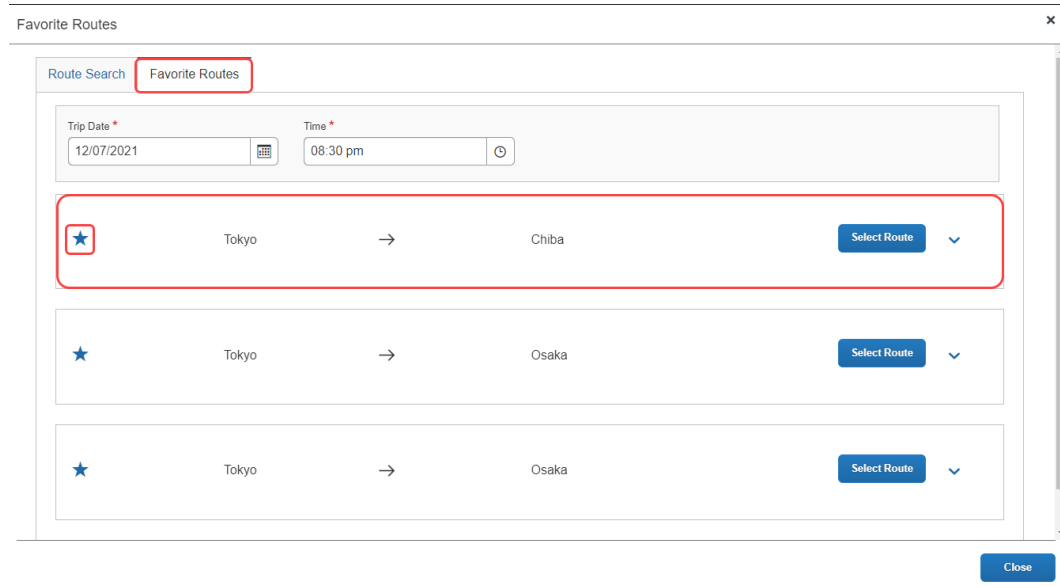
The route is removed, and the **Favorite Routes** list tab is updated.





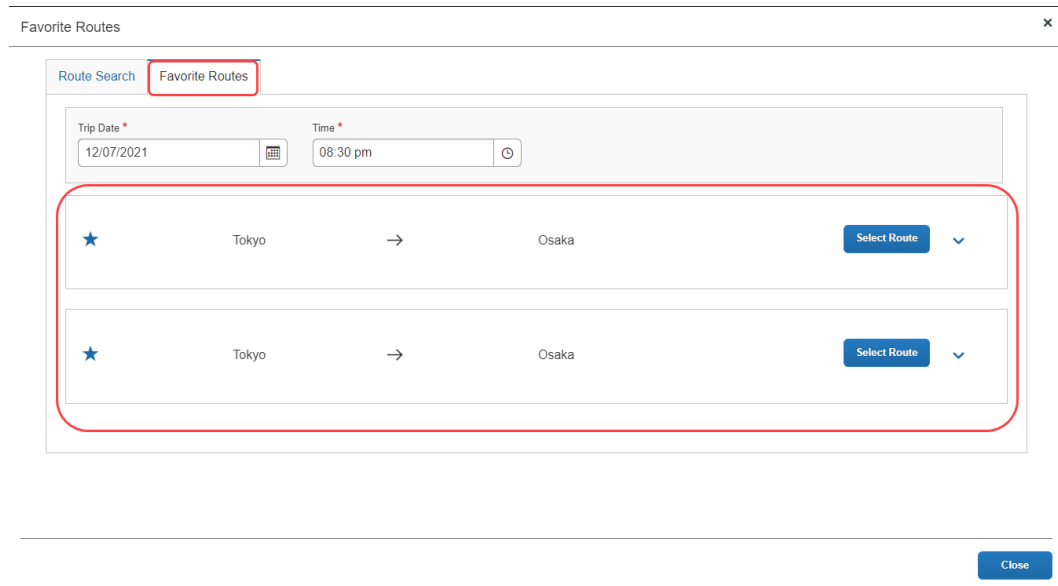
### DELETING A FAVORITE ROUTE FROM THE FAVORITE ROUTES TAB

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.



The screenshot shows a 'Favorite Routes' dialog box. At the top, there are 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' (12/07/2021) and 'Time' (08:30 pm). The main area of the dialog displays two identical route entries, each enclosed in a red rounded rectangle. Each entry consists of a blue star icon, the text 'Tokyo' followed by a right-pointing arrow and 'Osaka', and a blue button labeled 'Select Route' with a downward arrow. At the bottom right of the dialog is a blue 'Close' button.

#### 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.

The screenshot shows the 'Favorite Routes' window with the 'Favorite Routes' tab selected. A red box highlights the 'Trip Date' field, which displays '12/07/2021'. A calendar dropdown is open, showing the month of December 2021. The date '7' is selected and highlighted with a pink border. To the right of the date field is a 'Time' field displaying '03:00 pm'. Below these fields are two route entries, each starting with 'Osaka' and a 'Select Route' button. The window has a 'Close' button at the bottom right.

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

The screenshot shows the 'Favorite Routes' window with the 'Favorite Routes' tab selected. A red box highlights the 'Trip Date' and 'Time' fields. The 'Trip Date' field now displays '12/06/2021'. The 'Time' field displays '09:00 pm'. A time selection dialog is open, showing 'Hours' as '02', 'Minutes' as '00', and 'AM/PM' as 'AM'. The dialog has 'Cancel' and 'OK' buttons. Below the date and time fields are two route entries. The first entry starts with a star icon and 'Tokyo', followed by an arrow and 'Osaka', and a 'Select Route' button. The second entry also starts with a star icon and 'Tokyo', followed by an arrow and 'Osaka', and a 'Select Route' button. The window has a 'Close' button at the bottom right.


### 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.

The screenshot shows a 'Favorite Routes' dialog box with a close button (X) in the top right corner. It features two tabs: 'Route Search' and 'Favorite Routes', with the latter being the active tab. Below the tabs, there are two input fields: 'Trip Date \*' with the value '12/06/2021' and a calendar icon, and 'Time \*' with the value '02:00 am' and a clock icon. Below these fields, there are two route entries. The first entry is highlighted with a red border and contains a star icon, the text 'Tokyo' followed by a right-pointing arrow and 'Osaka', a blue 'Select Route' button, and a downward arrow. The second entry is identical but not highlighted. At the bottom right of the dialog is a blue 'Close' button.

### 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 

12/06/2021

Cancel

Save Expense

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

Reverse

INR

Amount in INR

9,261.04

Comment

Total Route Distance (km)

560.7

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

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 in the Concur Expense system. The window shows a route from Tokyo to Osaka with a total distance of 560.7 km and a total cost of JPY 13,870. The route includes stops at Tokyo, Higashi-Kanagawa, Shin-Yokohama, and Shin-Osaka. The departure time from Tokyo is highlighted with a red box and updated to 04:55. The arrival time at Shin-Osaka is 08:12. The window also shows the total route distance and the total cost.

Station	Line	Distance (km)	Stops	Arrival Time	Departure Time
Tokyo	JR-Keihin-Tohoku-Negishi-Line for Ofuna	37 min / 27.0	12		04:55
Higashi-Kanagawa				05:32	05:35
Shin-Yokohama	JR Yokohama-Line for Hachioji	9 min / 6.1	2	05:44	06:00
Shin-Osaka	JR Shinkansen Hikari 533	2 hr 12 min / 523.8	4	08:12	

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

The screenshot shows the 'Japan Public Transportation' expense entry form. At the top, it displays 'Japan Public Transportation ¥14,038' and a trash icon. Below this is a 'Details' tab and a 'Route Search' button. The form includes fields for 'Expense Type' (set to 'Japan Public Transportation'), 'Transaction Date' (11/30/2021), 'Business Purpose', 'Vendor Description', 'City', 'Payment Type' (Cash), 'Amount' (14,038), 'Currency' (Japan, Yen), and a 'Comment' box. At the bottom, it shows 'Total Route Distance (km)' (569.4), 'Departure Station' (Tokyo), 'Arrival Station' (Osaka), and 'Additional Charges' (¥4,960). A 'Route Details' section indicates 'Trip: One Way Trip', 'Ticket: IC Card', and 'Pass: Commuter Pass Deduction' (highlighted in yellow). Buttons for 'Cancel' and 'Save Expense' are in the top right.

### 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.

The screenshot shows the 'Route Search' dialog box. It has tabs for 'Route Search' and 'Favorite Routes'. The 'Route Search' tab is active, showing fields for 'Trip Date' (12/07/2021), 'Time' (09:00 pm), 'Trip Type' (One-way), 'Seat Type' (Non-reserved), 'Departure Station' (Tokyo (Tokyo)), and 'Arrival Station' (Chiba (Chiba)). A 'Via 1' field is highlighted with a red box, showing 'Osaka (Osaka)'. Below these fields are 'Search' and 'IC Card Fare' checkboxes. The 'ROUTE RESULTS' section shows a route from Tokyo to Osaka to Chiba, with 'Osaka (Osaka)' highlighted in a red box. A 'Sort By' dropdown is set to 'Cheap'. At the bottom, a route summary shows a star icon, '21:39', 'Tokyo', '10:04', 'Chiba', and 'JPY 25,990'. A 'Select Route' button is next to it. A 'Close' button is in the bottom right corner.

### 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.

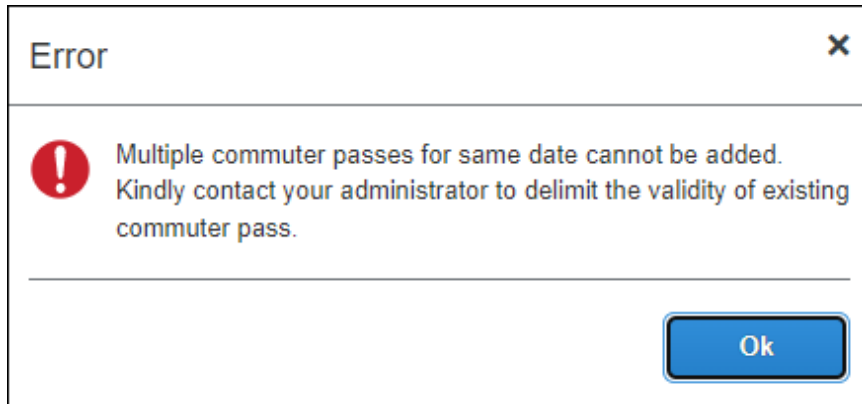
The screenshot displays the 'Favorite Routes' tab in the SAP Concur NextGen UI. At the top, there are input fields for 'Trip Date' (12/07/2021) and 'Time' (09:00 pm). Below these, the route is shown as 'Tokyo' to 'Chiba'. The route details are expanded, showing a sequence of stops: Tokyo, Walk, Tokyo-Ekimae/Highway-Bus-Shuttle-Bus, Highway-Bus グランドリーム号 for JR-Nara-Ekimae, Kyoto-Ekimae, Walk, Kyoto, JR Kyoto-Line Rapid for Aboshi, Osaka (highlighted with a red box), JR Kyoto-Line for Kyoto, Shin-Osaka, JR Shinkansen Nozomi 206, and Tokyo. A 'Select Route' button and a map icon are visible in the top right corner of the route details section.

#### 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:

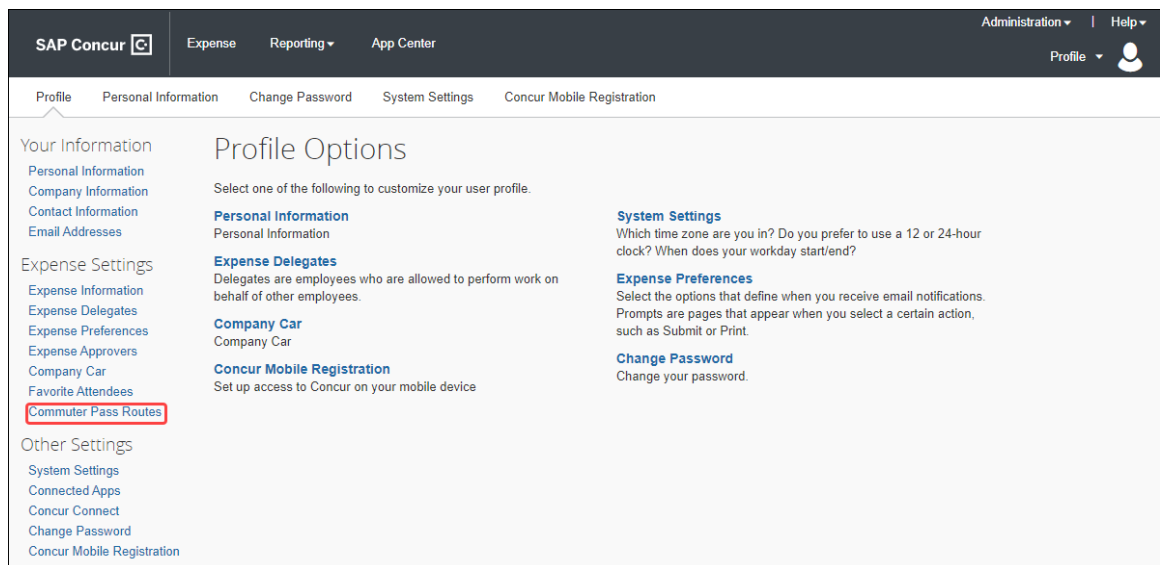


### REGISTERING A COMMUTER PASS ROUTE USING ROUTE SEARCH

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](#)

<input type="checkbox"/> Reference	From Station	To Station	Start Date	End Date	Date Added
<input type="checkbox"/> 渋谷-東京 / トロ銀座線-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)  
Trip Date: 05/09/2021 Time: 03:00 PM

Sort By Cheap

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.

The screenshot displays a 'Route Search' window with the following details:

- ROUTE RESULTS:** Hokkaido-Iryo-Dai... → Kyoto (Kyoto)
- Trip Date:** 05/08/2021 **Time:** 03:00 PM
- Sort By:** Cheap
- Displaying:** 5 results

Time	From	To	Price	Transfer	Buttons
17:32	Hokkaido-Iryo-Dai	Kyoto	¥36,530	Transfer: 3	Select Route
15:17	Hokkaido-Iryo-Dai	Kyoto	¥36,530	Transfer: 3	Select Route
23:05	Hokkaido-Iryo-Dai	Kyoto	¥36,530	Transfer: 3	Select Route
15:43	Hokkaido-Iryo-Dai	Kyoto	¥38,270	Transfer: 4	Select Route
15:17	Hokkaido-Iryo-Dai	Kyoto	¥38,270	Transfer: 4	Select Route

Each route entry also includes a duration and distance: 19 hr 57 min / 1,707.4 km for the first three routes, and 19 hr 38 min / 1,707.4 km for the last two.

## 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.

Japan Public Transportation ¥0 🗑️

05/09/2021

Details

⌚ Allocate | 🔍 Route Search | 👤 Route Details

\* Required field

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

Receipt Status \*

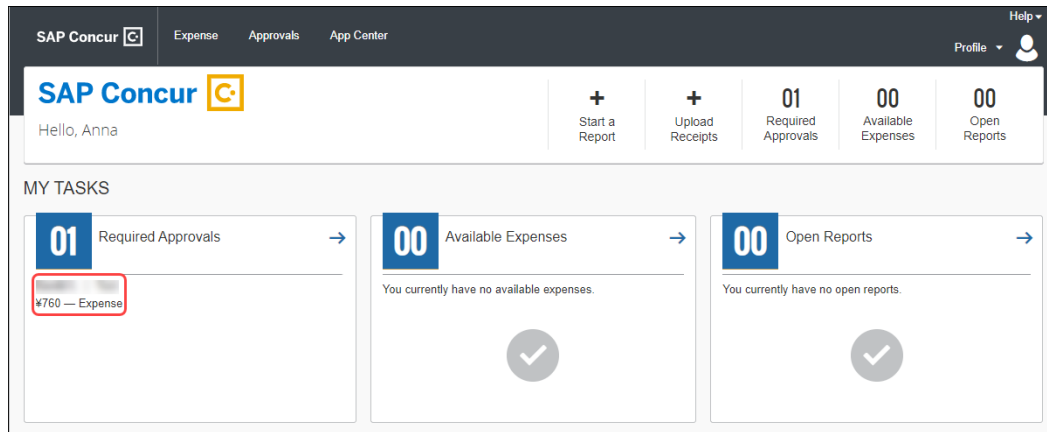
No Receipt ▼

## Section 4: What the Approver Sees

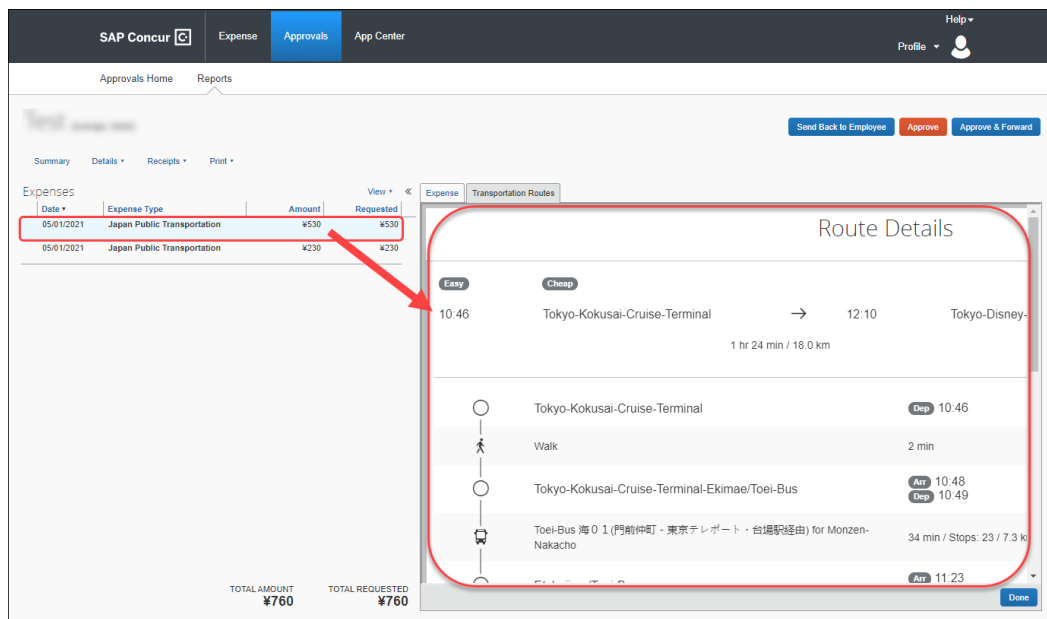
### PROCESSING A JAPAN PUBLIC TRANSPORTATION ROUTE SEARCH EXPENSE

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



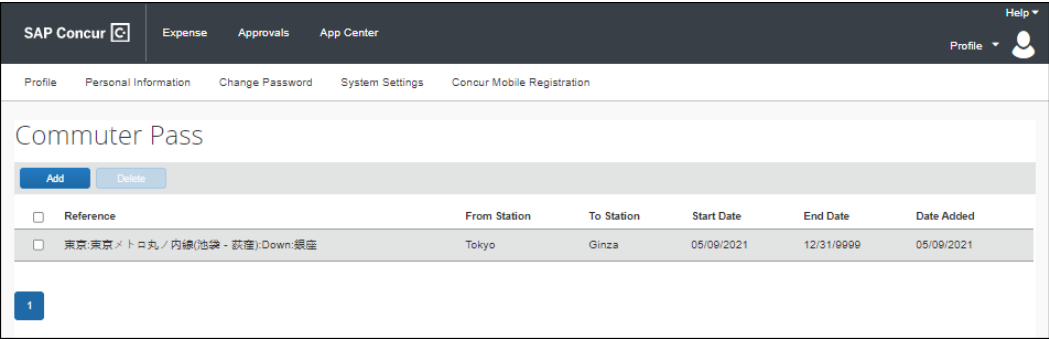
When the expense is selected, approvers can view the journey's route details; this gives them the opportunity to verify if the route complies with the organization's travel policy.



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.

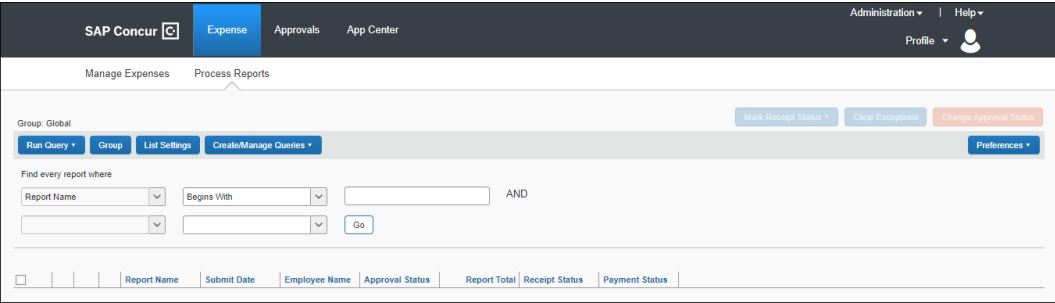


Section 5: What the Administrator Sees

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

The screenshot shows the 'Reports Ready for Processing' page in SAP Concur. The page has a top navigation bar with 'SAP Concur', 'Expense', 'Approvals', and 'App Center'. Below this is a sub-navigation bar with 'Manage Expenses' and 'Process Reports'. The main content area has a search filter section with 'Find every report where' and fields for 'Report Name', 'Begins With', and 'AND'. Below the search filters is a table of reports.

	Report Name	Submit Date	Employee Name	Approval Status	Report Total	Receipt Status	Payment Status
<input type="checkbox"/>	Test	2021/05/23	Japan, User 1	Approved & In A...	¥3,927	Received / Not ...	Not Paid
<input type="checkbox"/>	Std test	2021/05/23	Japan, User 1	Approved & In A...	¥930	Received / Not ...	Not Paid
<input type="checkbox"/>	Test1	2021/05/21	Japan, User 1	Approved & In A...	¥2,732	Received / Not ...	Not Paid

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

The screenshot shows the 'Route Details' page for a selected expense report. The page has a top navigation bar with 'SAP Concur', 'Expense', 'Approvals', and 'App Center'. Below this is a sub-navigation bar with 'Manage Expenses' and 'Process Reports'. The main content area has a 'Summary' tab selected, showing a table of expenses.

Expenses	Date	Expense Type	Reviewed	Amount	Requested
<input checked="" type="checkbox"/>	2021/05/23	Japan Public Transportat	N	¥199	¥199
<input type="checkbox"/>	2021/05/23	Fuel	N	¥3,728	¥3,728

At the bottom of the table, it shows 'TOTAL AMOUNT ¥3,927' and 'TOTAL REQUESTED ¥3,927'. To the right of the table is a 'Route Details' panel showing a route from Shinjuku to Ginza. The route is highlighted with a red border. The route details include the start time (10:00), end time (10:20), distance (6.0 km), and a list of stops: Shinjuku, Walk, Shinjuku, Tokyo-Metro-Marunouchi-Line for Ikebukuro, and Ginza. The route is also labeled 'Easy', 'Cheap', and 'Eco Friendly'.

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' section is active, with a 'Company' dropdown. The 'Concur Admin' tab is selected, and a 'Save' button is visible. The 'General' section contains settings for '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 contains several checkboxes: '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 a 'Default Payment Type to be used' dropdown and an 'Enable Amex Business Card integration' checkbox (unchecked). The 'Enable Financial Integration' checkbox is also 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' interface. It features a search bar with the text 'Find commuter passes where:' followed by a 'Login ID' dropdown, an 'Equals' dropdown, and a text input field. A 'Search' button is located to the right of the input field. Below the search bar, there are five buttons: 'Add', 'Order', 'Save', 'Cancel', and 'Send to Excel'.



## Section 5: What the Administrator Sees

The screenshot shows a window titled "Commuter Pass Route" with a close button (X) in the top right corner. Inside the window, there are several input fields and a search button. The fields are arranged in two columns. The left column contains "Login ID \*" (text input), "Departure Station \*" (dropdown), "Via 1" (dropdown), "Via 3" (dropdown), and a "Search" button. The right column contains "Start Date \*" (date input with a calendar icon, showing 04/13/2022), "Arrival Station \*" (dropdown), "Via 2" (dropdown), and "Via 4" (dropdown).

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.

The screenshot shows the "Commuter Pass Administrator" interface. At the top, there is a search bar with the text "Find commuter passes where:" followed by a dropdown menu set to "Login ID", a dropdown menu set to "Equals", and a "Modify Search" button. Below the search bar, there are five buttons: "Add", "Delete", "Save", "Cancel", and "Send to Excel". Below the buttons is a table with the following columns: "Employee Id", "Reference", "From Station", "To Station", "Start Date", "End Date", and "Date Added". The table contains two rows of data. The first row shows a user with a reference of "東京 J R 山手線外回り:Down:渋谷" and a start date of "06/10/2021". The second row shows a user with a reference of "渋谷 J R 山手線内回り:Down:東京" and a start date of "06/22/2021". At the bottom left of the table, there is a blue button with the number "1".

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**.

Expense Settings > Expense - Expense Types

### Expense - Expense Types

Review the lists of Active and Inactive expense types. Inactive expense types will not be shown to users. If you cannot find the expense type you need, click **New**.

Need help? [How it works](#)

1 Expense Types 2 Account Codes 3 Expense Forms 4 Attendee Forms

JAPAN | Save Activate Deactivate Folio Type Mapping Import

Expense Type	Flag Expenses Over	Don't Allow Expenses Over
Active Expense Types		
Airfare		
Airline Fees		
Bus		
Business Meals (Attendees)		
Car Rental		
Company Car Mileage		
Entertainment - Client		
Fuel		
Gifts - Clients		
GST/HST		
Hotel		
Hotel Tax		
Incidentals		
Japan Public Transportation		
Marketing/Promotional Costs		
Miscellaneous		
Office Supplies/Software		
Parking		
Taxi		
Train		

## 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

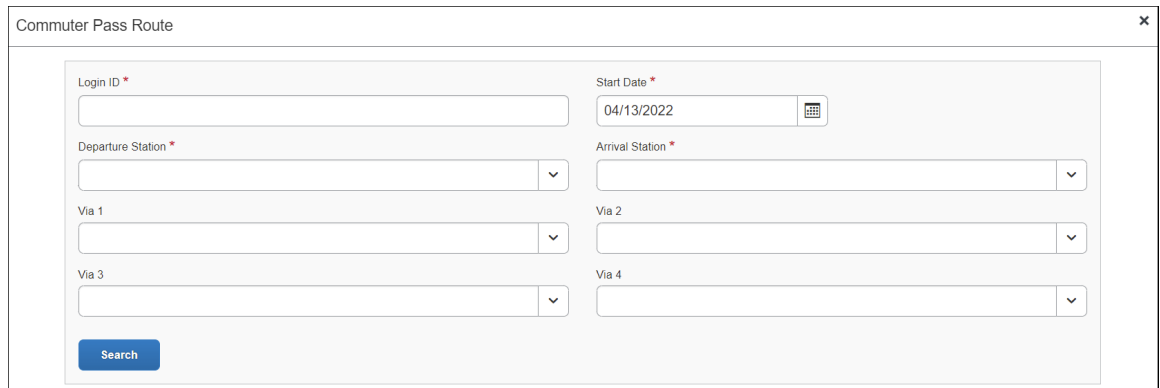
Concur Admin will be able to search and add commuter passes on behalf of the user.

#### ► 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" with a close button (X) in the top right corner. The form contains several input fields and a search button. The fields are arranged in two columns. The left column has "Login ID \*" (text input), "Departure Station \*" (dropdown), "Via 1" (dropdown), "Via 3" (dropdown), and a "Search" button at the bottom. The right column has "Start Date \*" (date input with a calendar icon, showing "04/13/2022"), "Arrival Station \*" (dropdown), "Via 2" (dropdown), and "Via 4" (dropdown).

- ◆ **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.

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**.

Commuter Pass Administrator

Find commuter passes where: Login ID Equals

Add Delete Save Cancel Send to Excel

<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	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	06/16/2021

1

SAP

December

Su Mo Tu We Th Fr Sa

28 29 30 1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

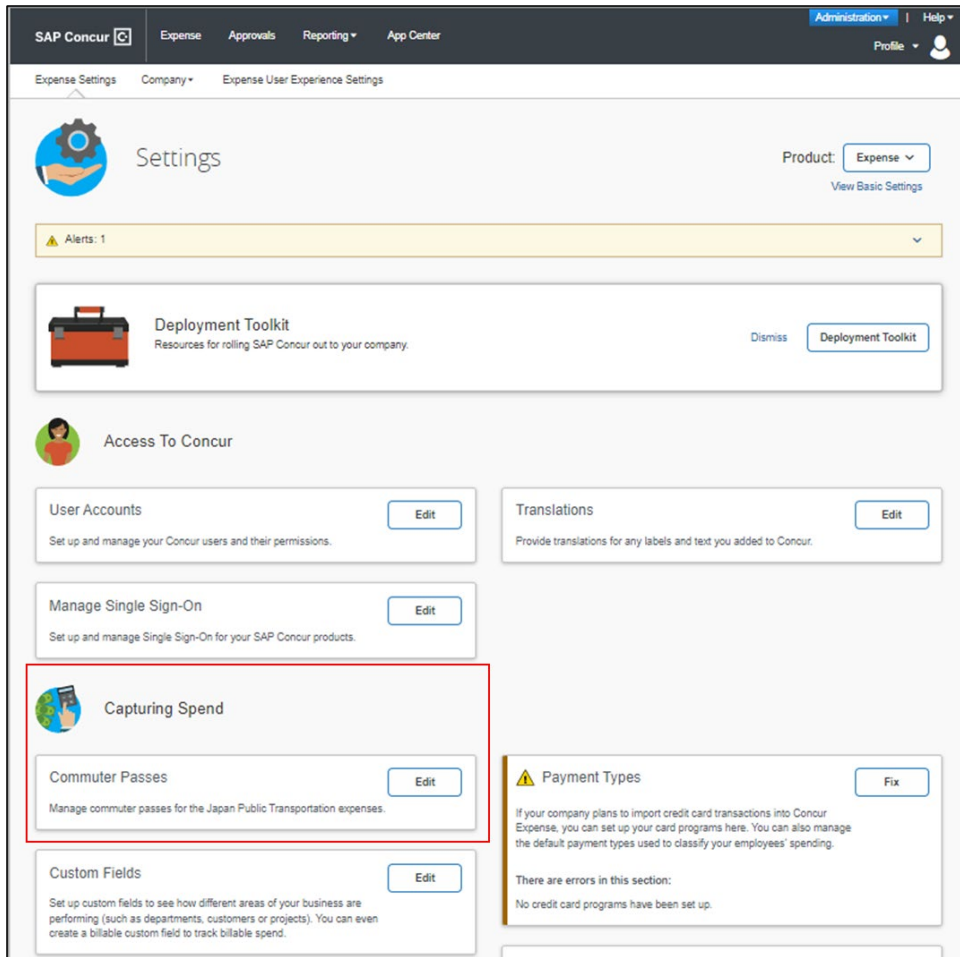
26 27 28 29 30 31 1

2 3 4 5 6 7 8

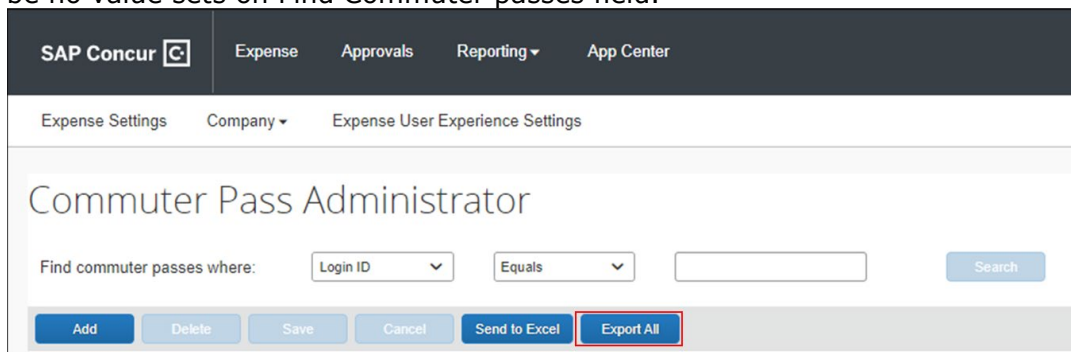
**Exporting Commuter Passes**

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

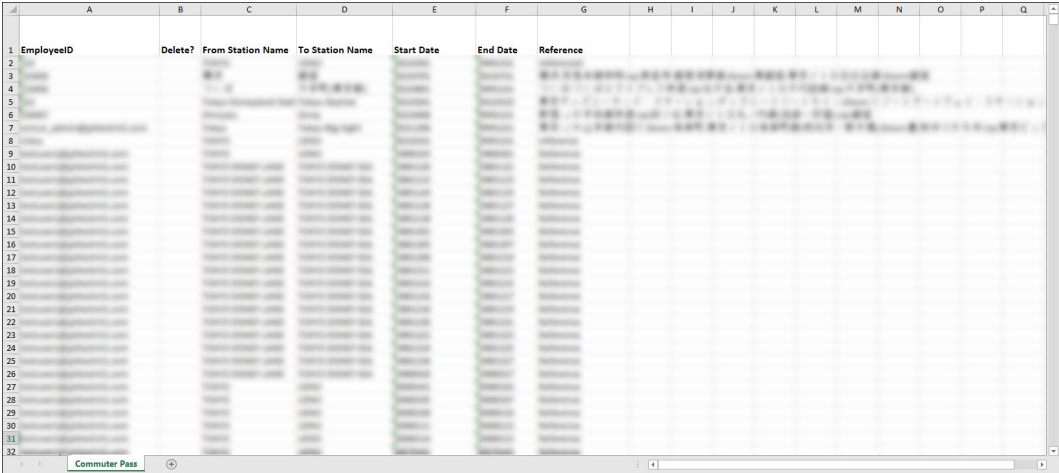


On the **Commuter Pass Administrator** page, Concur admin clicks the **Export All** button to export the commuter pass information to an Excel spreadsheet. All existing commuter passes of JPT on NextGen UI information will be exported and there will be no value sets on Find Commuter passes field.



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.

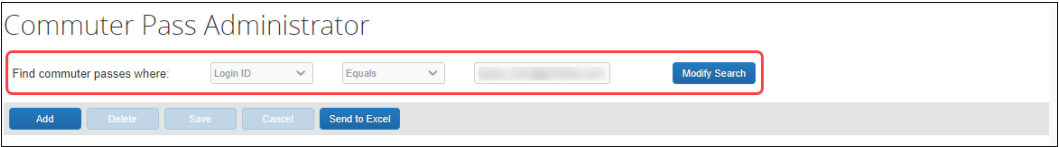
EXAMPLE



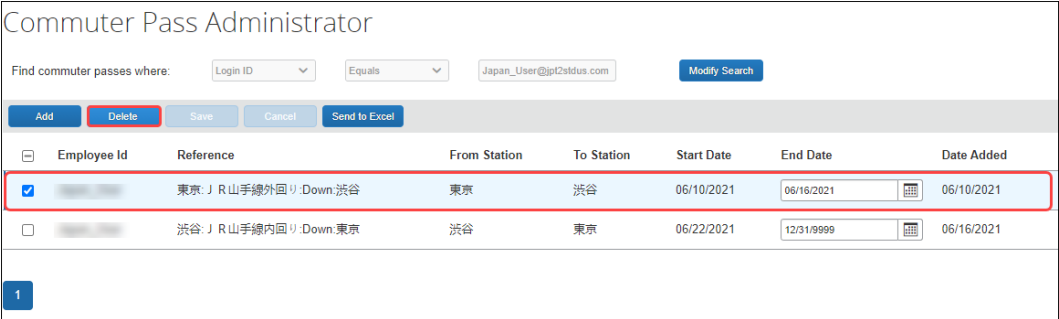
Deleting a Commuter Pass Route

► To delete a commuter pass route:

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



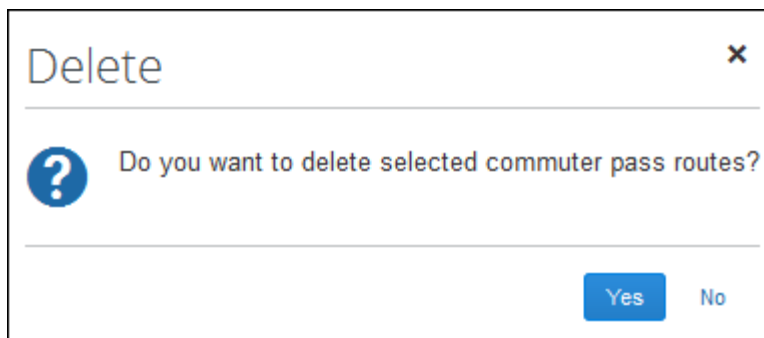
2. In the list of returned routes, select the check box for one or more routes to remove.
3. Click **Delete**.



	Employee Id	Reference	From Station	To Station	Start Date	End Date	Date Added
<input checked="" 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	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	06/16/2021

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.



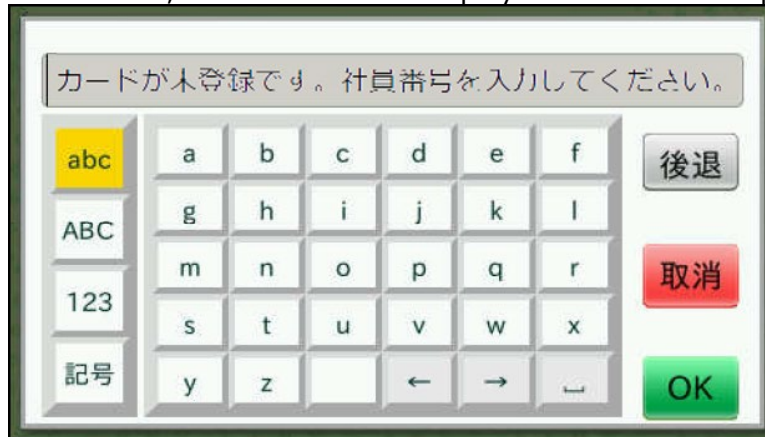
4. The first time a user taps their IC Card on the network IC Card reader device located in their office, they will be prompted to enter their employee ID (not every time, just the first time). After entering their employee ID, their last 19 routes at maximum will be imported into Concur Expense.).

### ***How Expense Works With the IC Card***

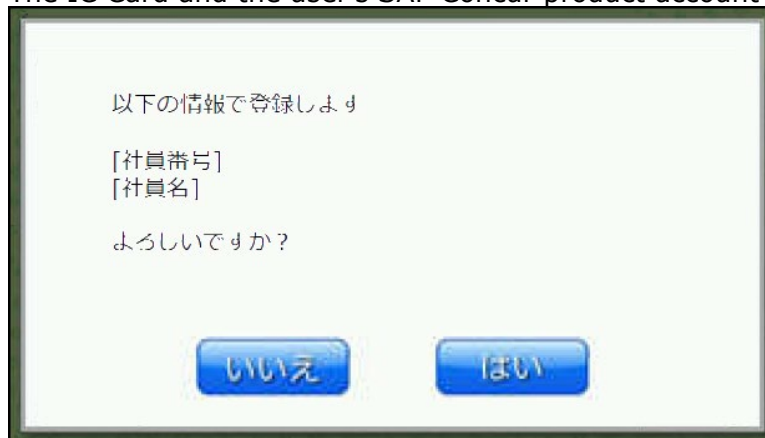
A device should be installed in each Company location. An employee swipes the IC Card on the device. Routes stored on the IC Card are pulled into the Receipt Store and displayed in **Available Expenses** along with any other Smart Expenses.

### ***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 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:** A text input field containing 'JPT AR1'.
- Event:** A dropdown menu with 'Entry Save' selected. This field is highlighted with a red rectangular box.
- Editable By:** A dropdown menu with 'Global' selected.
- Applies To:** A dropdown menu with 'Global' selected.
- Active:** A dropdown menu with 'Yes' selected.

**Audit Rules**

Custom Random

1 Audit Rule 2 Conditions 3 Exception

Insert Remove

Data Object/Operator	Field/Value	Operation
<input type="checkbox"/> Entry	Source/Type Classification	
Equal		
Value	Route Search	
		<input type="checkbox"/> And <input checked="" type="radio"/> Or
<input type="checkbox"/> Entry	Source/Type Classification	
Equal		
Value	IC Card	

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
<b>Source/Type Classification</b>	<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"> <li><b>CARD</b> = (IC Card) Route data entered using IC Card</li> <li><b>RSRC</b> = (Route Search) Route data entered by search</li> </ul>

