Concur Request: Japan Public Transportation

Setup Guide

Last Revised: April 20, 2024

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
April 20, 2024	Initial publication.

Japan Public Transportation

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.

Section 1: Permissions

A company administrator may or may not have the correct permissions to use this feature. The administrator may have limited permissions, for example, they can affect only certain groups and/or use only certain options (*view* but not *create* or *edit*).

If a company administrator needs to use this feature and does not have the proper permissions, they should contact the company's SAP Concur administrator.

Also, the administrator should be aware that some of the tasks described in this guide can be completed only by SAP Concur. In this case, the client must initiate a service request with SAP Concur support.

Section 2: Overview of the Request Feature

Refer to the *Concur Request: Overview Guide* for general information about requests, such as what the user sees, what the approver sees, workflow, settings, configuration basics, etc.

Section 3: Request Configurations

Not all Request features are available for all Request configurations.

In order to use the Japan Public Transportation feature in Concur Request, you must have Concur Expense and Concur Request.

Configuration	Is this feature available?
Stand-alone	No
Integrated with Concur Expense (but not Concur Travel)	Yes, Optional
Integrated with Concur Travel (but not Concur Expense)	No
Integrated with Concur Expense and Concur Travel	Yes, Optional

Section 4: Overview

The typical businessperson in Japan can have multiple train or bus rides per day that they will track and process for reimbursement. To answer the need to request this type of travel before the trip occurs, SAP Concur designed and integrated the Japan Public Transport (JPT) feature into the Concur Request product.

Who Should Use This Feature

The JPT feature is intended for use by both Japanese domiciled companies, and by multinational companies with employees located in Japan. The bus and rail content sourced for the JPT feature is specific to the Japan marketplace. The feature cannot be used with any bus and rail content outside of Japan.

Required Roles

There are no required roles to use the Japan Public Transport feature in Concur Request; you need only have the Request User role.

NOTE: Configuration areas require a specific role be assigned. For example, access to **Administration > Request > Request Policies** to assign the *Japan Public Transportation* expense type.

Japan Public Transportation Documentation

Concur Expense

The JPT feature is mainly configured in Concur Expense. The following documents will be needed to configure and use the JPT feature for your company:

- *Concur Expense: JPT on NextGen UI Setup Guide* – This document provides basic information about configuring the JPT functionality.

- *Concur Expense: JPT on NextGen UI User Guide* – This document provides basic end-user information on how to use the JPT functionality.

- *Concur Expense: Japan IC Card Integration User Guide* – This document provides information about configuring and using IC Cards.

- *Concur Expense: JPT on NextGen UI – Commuter Pass Import User Guide* – This document provides information on importing Commuter Passes.

Concur Request

To use the Japan Public Transportation feature with Concur Request, you will need the following document:

- *Concur Request: Japan Public Transportation Setup Guide* (This guide) – This document provides basic information about using and configuring Concur Request for the Japan Public Transportation feature, and information about

creating and approving requests with Japan Public Transportation expected expenses.

Section 5: General Information

This section provides requirements and general information about the Japan Public Transportation feature in Concur Request.

This guide documents the Japan Public Transportation feature available to clients who use Concur Request.

If you will also be using the Japan Public Transportation feature with Concur Expense, such as creating expense reports from requests that have JPT expected expenses, you will need both Concur Request and Concur Expense.

Section 6: End-User Experience

When the Japan Public Transportation feature is enabled for your organization, you can add an expected expense for JPT on a request by selecting the Japan Public Transportation expense type.

Creating a Request

When creating a request, in order to select the Japan Public Transportation expense type, you will need to select the request policy that has the Japan Public Transportation expense type enabled for the policy.

The **Route Search** dialog is used to locate and select the JPT route for the JPT expected expense. On the **Route Search** tab, you can search for and add a specific route to the expected expense, and you can designate your most commonly used routes, known as favorites. On the **Favorite Routes** tab, you can add a route to a JPT expected expense by selecting a favorited route.

  For more information about creating a favorite route, refer to the *Adding a Favorite Route* section in this guide. For more information about creating a JPT expected expense from a favorite route, refer to the *Adding a Favorite Route to a JPT Expected Expense* section in this guide.

▶ *To create a request with a Japan Public Transportation expected expense:*

1. From Concur Request, click **Create New Request**.

NOTE: There are other valid paths to start a new request.

2. On the **Create New Request** page, commonly referred to as the request header, complete all required fields. An asterisk indicates a required field. In the **Request Policy** list, you need to select the Concur Request policy associated with the *Japan Public Transportation* expense type.

NOTE: If you do not see the *Japan Public Transportation* expense type when creating your JPT request, contact your SAP Concur administrator.

NOTE: The policy selected may impact which fields display.

3. Click **Create Request** to create the request.

4. On the **Expected Expenses** page, click **Add**.

Clicking **Add** opens the **Add expected expenses and/or travel plans** dialog.

5. Select the *Japan Public Transportation* expense type.

Selecting the *Japan Public Transportation* expense type opens the **Route Search** dialog.

6. On the **Route Search** tab, search for the route associated with your trip by providing the required JPT route search criteria.

The following table shows the search fields and their descriptions.

Field Name	Description
Trip Date	Enter the date the trip will occur.
Time	Enter the time the trip will occur.
Trip Type	Select the type of trip: **One-way** or **Round Trip**.
Seat Type	Select the applicable seat type: • **Non-reserved** • **Reserved** • **Green (first class)**
Departure Station	Enter the name of the departure station for the trip. As you type, the list of matching station names is displayed. Select the departure station from the list.
Arrival Station	Enter the name of the arrival station for the trip. As you type, the list of matching station names is displayed. Select the arrival station from the list.

Field Name	Description
Via1	Enter the name of the via station for the trip. As you type, the list of matching station names is displayed. Select the via station from the list. The **Via1** and **Via2** fields are only displayed if the **Add Via Stations** link is clicked on **Route Search** tab.
Via2	Enter the name of the via station for the trip. As you type, the list of matching station names is displayed. Select the via station from the list. The **Via1** and **Via2** fields are only displayed if the **Add Via Stations** link is clicked on **Route Search** tab.

This is an example of the station list that appears when you start typing a station name.

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If necessary, you can add up to two via stations as part of your route search by clicking the **+ Add Via Stations** link.

By default, the **IC Card Fare** checkbox is selected. The **IC Card Fare** check box indicates whether the user ("traveler") paid for their ticket using their travel card or if the ticket was purchased from the ticket counter. When the check box is selected (enabled), it means the ticket was paid for with the traveler's travel card.

7. If the ticket was purchased from the ticket counter, clear the **IC Card Fare** check box.

8. Click **Search**.

When you click **Search**, Concur Request returns a maximum of five route results in the **Route Results** section of the **Route Search** tab.

In the **Route Results** section, you can sort the route results using the **Sort By** list. The **Sort By** list offers three sorting options: Cheap, Easy, and Fast. A route can have multiple route designations or none at all. For example, if sorting by Cheap, the route results displayed may have other designations.

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

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

In the **Route Results** section, you can click the down arrow next to the **Select Route** button 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.

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9. Click the **Select Route** button to select the route for your JPT expected expense.

Fast	**Cheap**						

☆	08:17	Shi-Bunka-Kaikan-Higashi/Sa ga-City-Bus → 14:47	Ginza	¥24,028	**Select Route** ⌃

6 hr 30 min / 1,229.5 km — Transfer: 4

Stop	Time	Distance	Fare
○ **Shi-Bunka-Kaikan-Higashi/Saga-City-Bus**	Dep 08:17		¥160
🚌 Saga-City-Bus 二俣線(金立公民館前 - 佐賀城跡) for Sagajo-Ato	10 min / Stops: 4 / 2.0 km		↓
○ **Saga-Eki-Bus-Center/Saga-City-Bus**	Arr 08:27 / Dep 08:28		
🚶 Walk	5 min		
○ **Saga**	Arr 08:33 / Dep 08:46		¥14,550 Non-Reserved (advance purchase): ¥1,000
🚆 JR Ltd.Exp. Relay-Kamome 8	39 min / Stops: 2 / 53.6 km		
○ **Hakata**	Arr 09:25 / Dep 09:36		Non-Reserved: ¥8,140
🚆 JR Shinkansen Nozomi 18	4 hr 49 min / Stops: 9 / 1,168.1 km		
○ **Shinagawa**	Arr 14:25 / Dep 14:35		
🚆 JR Ueno-Tokyo-Line for Mito	5 min / 4.9 km		↓
○ **Shimbashi**	Arr 14:40 / Dep 14:46		¥178
🚆 Tokyo-Metro-Ginza-Line for Asakusa	1 min / 0.9 km		↓
◉ **Ginza**	Arr 14:47		

The selected route information is displayed on the expected expense details page.

Additional information about the expected expense details page for a JPT expected expense:

♦ You may edit only the **Description** field.

♦ The **Route Search** link allows you to search for a route again, allowing you to easily edit the expected expense.

♦ The **Route Details** section displays the trip type (One Way Trip or Round Trip), the trip attributes (Cheap, Easy, and/or Fast), and the ticket type (Paper or IC Card Fare).

10. Click **Save** to save your JPT expected expense.

ADDING A FAVORITE ROUTE

You can designate a route you regularly use (for example, from home to work) as a favorite route. Favorite routes are available for selection on the **Favorite Routes** tab in the **Route Search** dialog.

When you create a JPT expected expense, you can select a route from the **Favorite Routes** tab to populate the route information for the expected expense.

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

▶ **To designate a route as a route favorite:**

1. On the **Route Search** tab, search for the route.

2. In the **Route Results** section, click the star icon for the route.
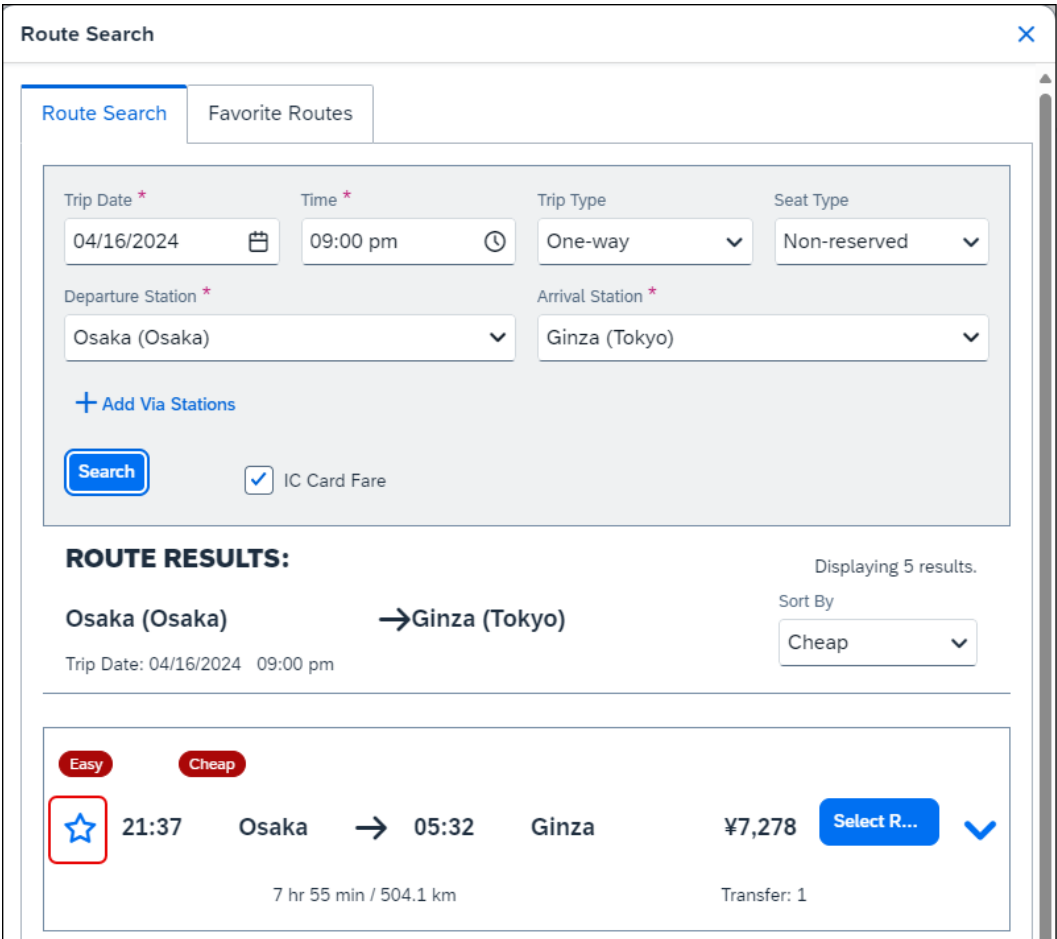
When you click the star icon, the route is added to the **Favorite Routes** tab, and the star for the route changes to blue to indicate the route is a favorite route.

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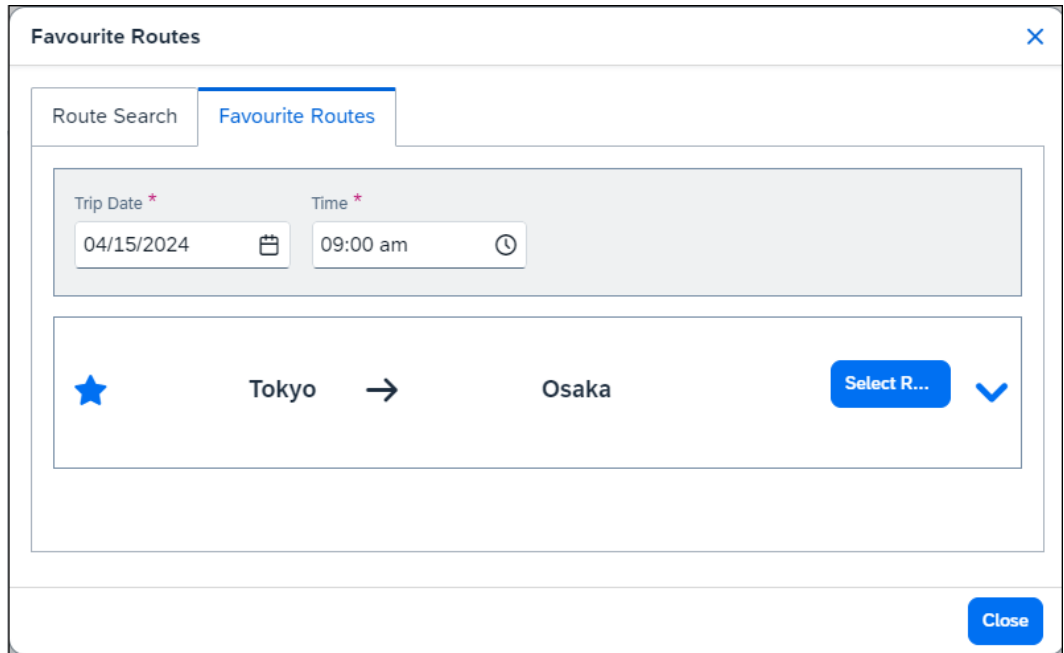
ADDING A FAVORITE ROUTE TO A JPT EXPECTED EXPENSE

You can add the route information to a JPT expected expense using a favorite route.

▶ ***To add a favorite route to a JPT expected expense:***

1. Create a request.

2. From Concur Request, click **Create New Request**.
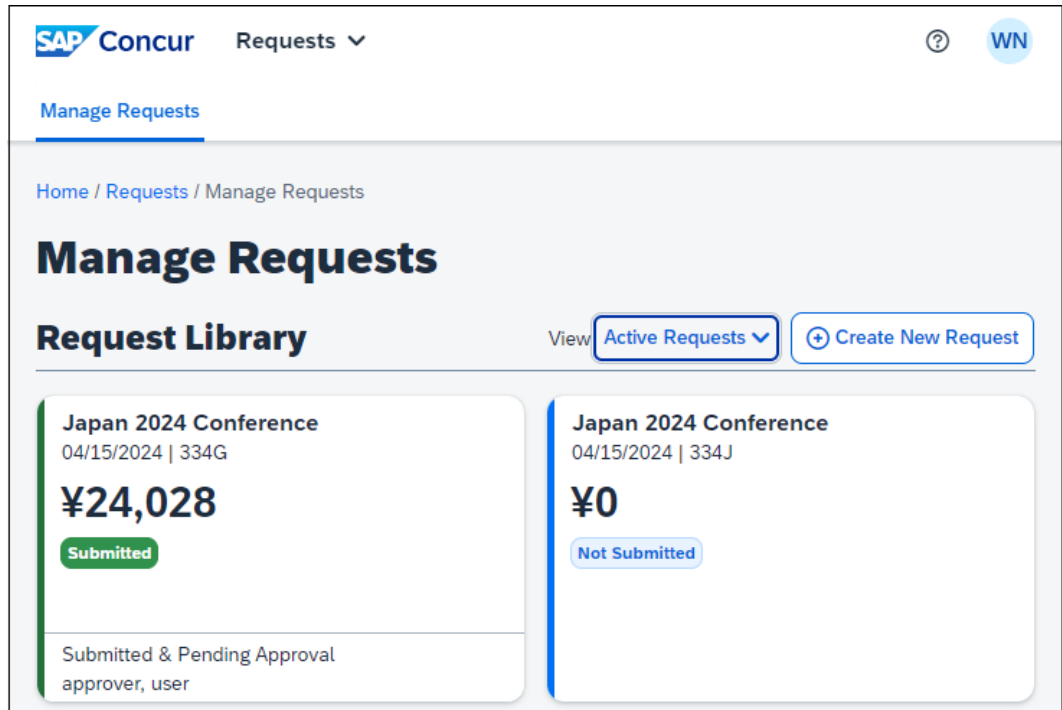
NOTE: There are other valid paths to start a new request.

3. On the **Create New Request** page, commonly referred to as the request header, complete all required fields. An asterisk indicates a required field. In the **Request Policy** list, you need to select the Concur Request policy associated with the *Japan Public Transportation* expense type.

> **NOTE:** If you do not see the *Japan Public Transportation* expense type when creating your JPT request, contact your SAP Concur administrator.

Create New Request   ✕

* Required field

Request Policy *

JPT Request Policy   ⌄

Request Name *

Japan 2024 Conferennce

Start Date *

04/15/2024   📅

End Date *

04/22/2024   📅

Purpose *   0/500

Comment   0/500

                                      Cancel   **Create Request**

> **NOTE:** The policy selected may impact which fields display.

4. Click **Create Request** to create the request.

5. On the **Expected Expenses** page, click **Add**.

Clicking **Add** opens the **Add expected expenses and/or travel plans** dialog.

6. Select the *Japan Public Transportation* expense type.

Selecting the *Japan Public Transportation* expense type opens the **Route Search** dialog.

Route Search   ✕

| Route Search | Favourite Routes |

Trip Date *
04/15/2024

Time *
08:00 am

Trip Type
One-way

Seat Type
Non-reserved

Departure Station *

Arrival Station *

＋ Add Via Stations

Search   ☑ IC Card Fare

Close

7. Click the **Favorite Routes** tab.

Favorite Routes   ✕

| Route Search | Favorite Routes |

Trip Date *
04/15/2024

Time *
10:00 pm

⭐   Osaka   ⇄   Nagano   **Select Route** ⌄

⭐   Osaka   →   Ginza   **Select Route** ⌄

⭐   Tokyo   →   Osaka   **Select Route** ⌄

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8. Click the **Select Route** button for the favorite route you want to add to the JPT expected expense.

NOTE: The ⇄ icon indicates that the favorite route is a round trip.

The selected route information is displayed on the expected expense details page.

Additional information about the expected expense details page for a JPT expected expense:

♦ The **Route Search** link allows you to search for another route, allowing you to easily edit the expected expense.

♦ The **Route Details** section displays the trip type (One Way Trip or Round Trip), the trip attributes (Cheap, Easy, and/or Fast), and the ticket type (Paper or IC Card Fare).

Home / Requests / Manage Requests / Japan 2024 May Conference / Japan Public Transportation

Japan Public Transportation ¥17,800

04/17/2024

🗑 Cancel Save

← →

🎛 Allocate 🔍 Route Search 📍 Route Details

* Required field

Transaction Date
04/17/2024

Description   0/64

Transaction Amount
17,800

Currency
Japan, Yen (JPY)

Comment   0/2000

Total Route Distance (km)
450.2

Departure Station
Osaka

Arrival Station
Nagano

Source
Route Search

Additional Charges
¥0

Route Details:
Trip: Round Trip
Ticket: IC Card

Save Cancel

9. Click **Save** to save your JPT expected expense.

REMOVING A FAVORITE ROUTE FROM THE ROUTE SEARCH

You can remove a favorite route designation from a route on the **Route Search** tab by clicking the star icon for the route. Clicking the star removes the blue star from the route.

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

Removing the favorite route designation from a route does NOT affect any previous JPT expected expenses submitted using the favorite route.
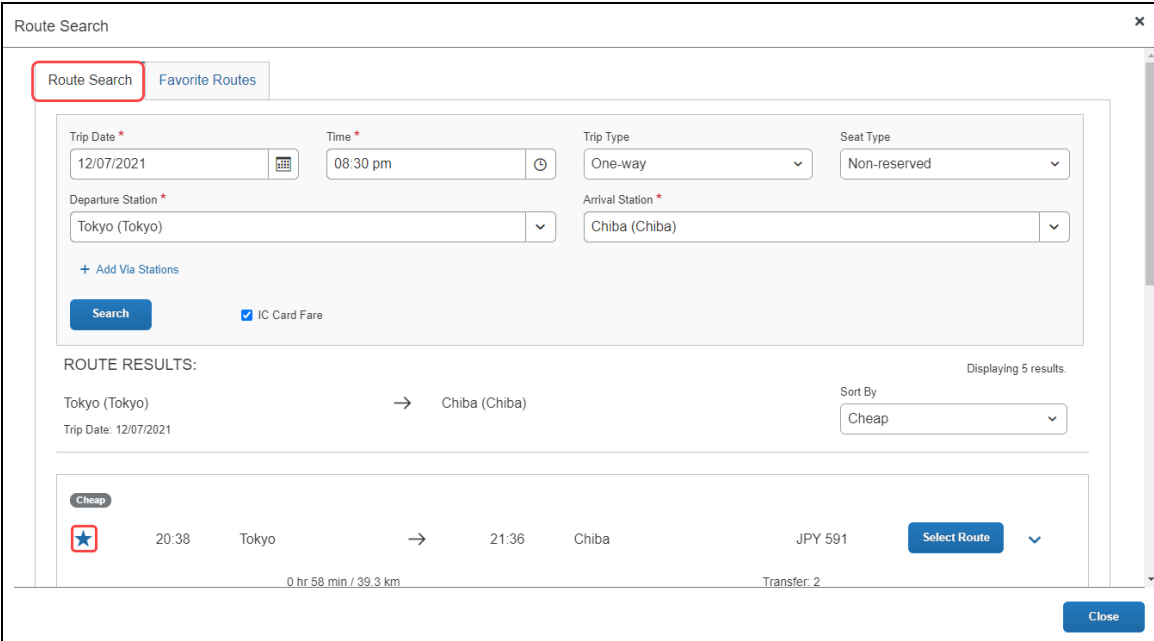
DELETING A FAVORITE ROUTE FROM THE FAVORITE ROUTES TAB

You can delete a favorite route from the **Favorite Routes** tab by clicking the star icon for the route.

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

▶ ***To delete a favorite route from the Favorite Routes tab:***

1. On the **Favorite Routes** tab, click the star icon for the favorite route.

   Clicking the star icon opens the *Do you want to delete the favorite route?* message.
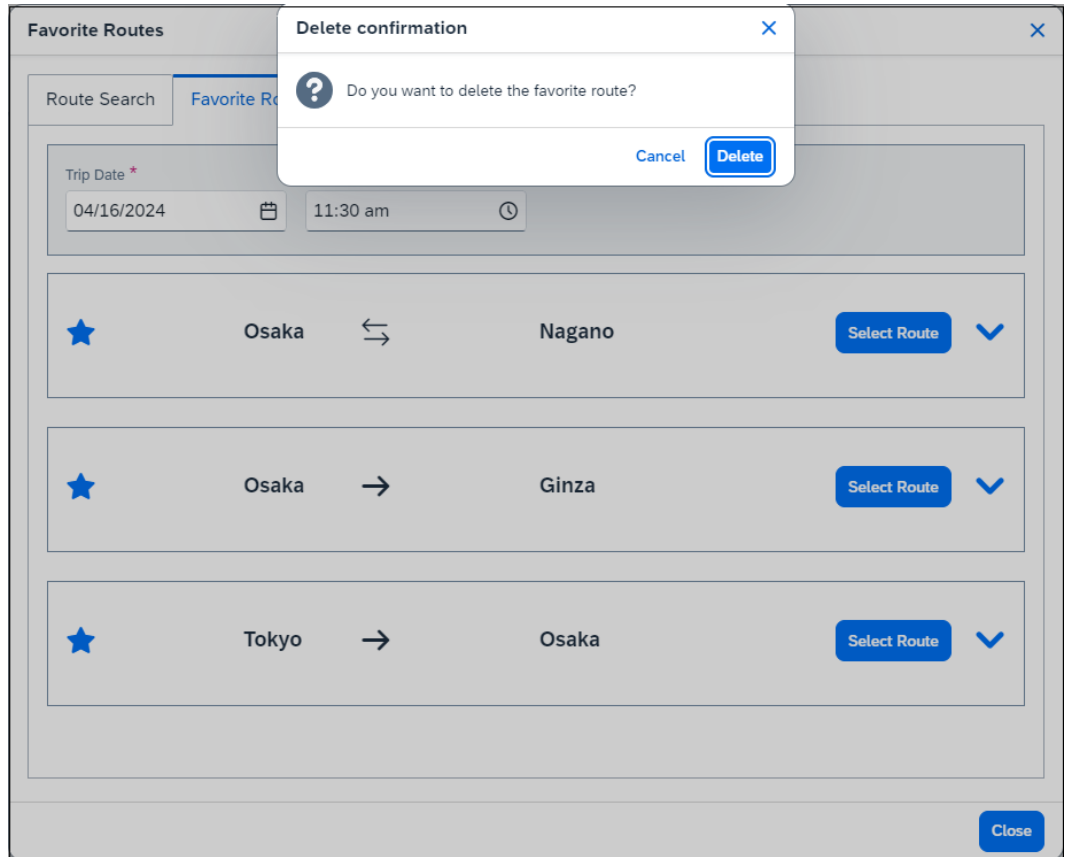
2. Click **Delete**.

The route is deleted from the **Favorite Routes** tab.
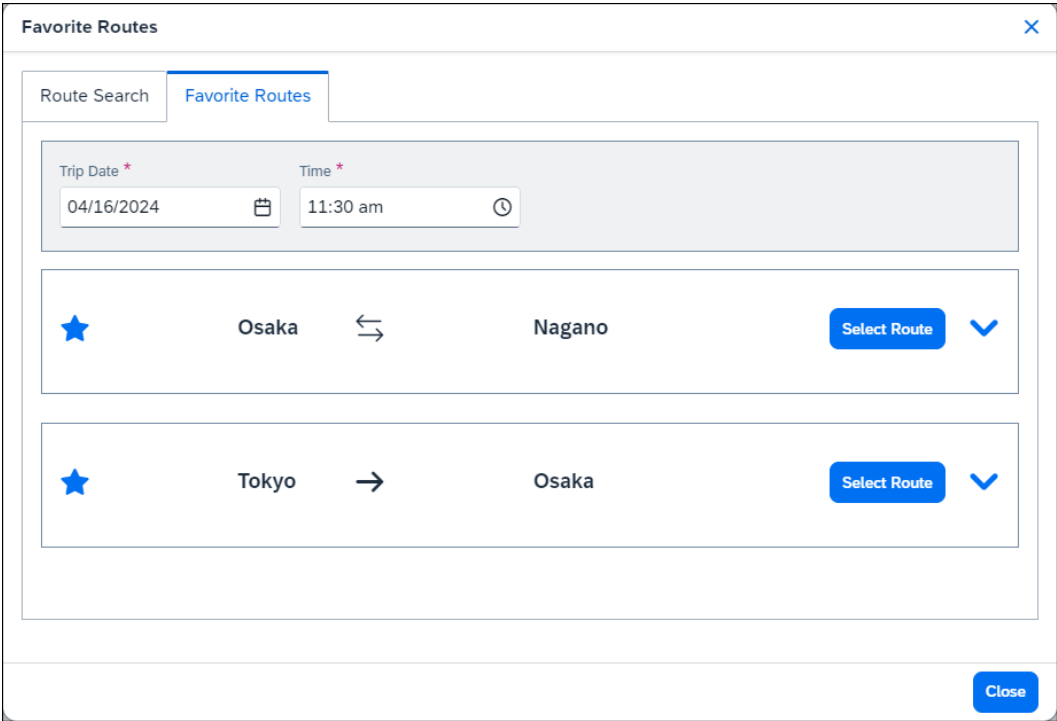
Approving a Request

After an employee submits a request with one or more *Japan Public Transportation* expected expenses, the approver can review the JPT expected expense(s) before approving the request. The approver cannot edit the JPT expected expenses of the request.

When viewing a JPT request in Approvals, approvers and processors can select the **Route Details** link displayed in the JPT expected expense to view the route details; this gives them the opportunity to verify if the route complies with the organization's travel policies.

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Creating an Expense Report

After a request with a JPT expected expense has been approved and the trip associated with the request is completed, you can create an expense report from the request with the JPT expected expense(s).

▶ *To create an expense report from a request:*

1. In Concur Request, open the approved request from which you want to create an expense report.

2. On the **Expected Expenses** page, click **Create Expense Report** button.

Clicking the **Create Expense Report** button opens the new expense report in Concur Expense.

The approved JPT request is automatically associated with the expense report, and the **Request** box is displayed above the **Report Details** menu.

📖 For more information about JPT expense reports, refer to the *Concur Expense: JPT on NextGen UI User Guide.*

Section 7: Configuring Japan Public Transport

In order to use the Japan Public Transportation expense type in Concur Request, the Japan Public Transportation feature must be enabled for Concur Expense and Concur Request.

While most of the configuration for the Japan Public Transportation feature is completed in Concur Expense, in order to use the Japan Public Transportation feature in Concur Request, there is some additional configuration that needs to be done in Concur Request.

When the Japan Public Transportation feature is enabled for your organization, the Japan Public Transportation expense type is available for selection on the **Expense Types** tab in Request Policies (**Administration > Request > Request Policies**).

▶ *To enable the Japan Public Transportation expense type for a request policy:*

1. In Request Policies, click the active request policy you want to enable Japan Public Transportation expense type for, and then click **Modify**.

   The **Modify Request Policy** page appears.

2. Click the **Expense Types** tab.

3. Select (enable) the check box for the *Japan Public Transportation* expense type.

4. Save the change in the policy by clicking the **Next** button on all tabs, and then clicking the **Done** button.
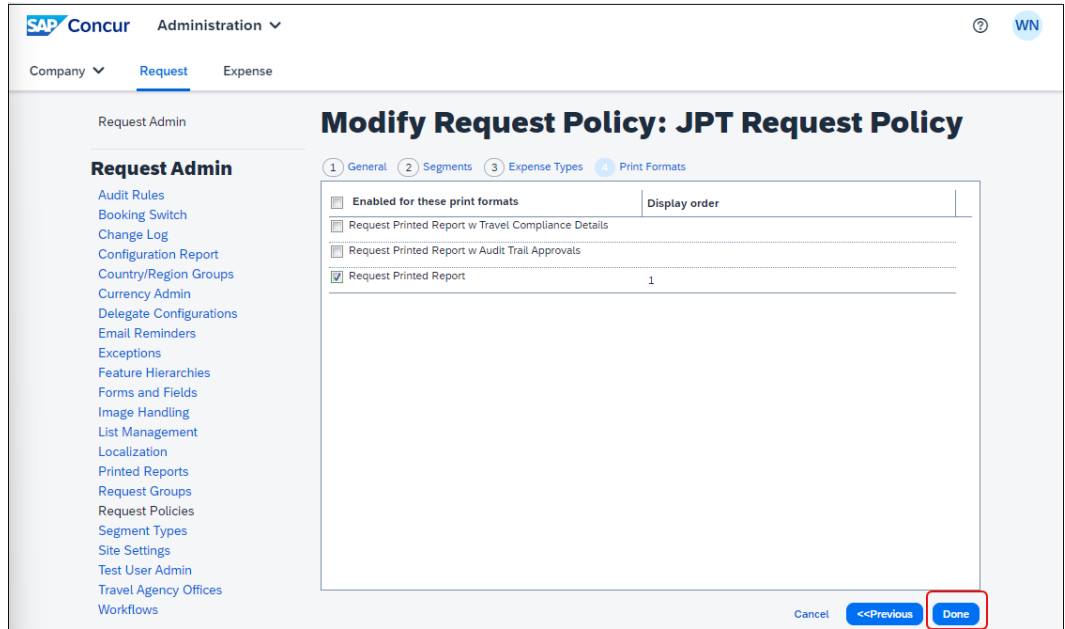
When a user is creating a request and selects this request policy, the J*apan Public Transportation* expense type will be available for selection in the request.

NOTE: If you do not see or are unable to activate the Japan Public Transportation expense type for the policy, work with your SAP Concur representative to enable the Japan Public Transportation feature in Concur Request.