

Frequently Asked Questions for Migrating to Japan Public Transport (JPT) on NextGen UI - Client

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Questions (Click to see the answers)

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Overview

1. Who are the target readers of this document and what will they be able to do with this?

Concur administrators who are using Japan Public Transport (JPT) on the existing UI that need to move to JPT on NextGen UI. This document supports the plan to migrate to JPT on NextGen UI.

2. Why this migration process is necessary?

On NextGen UI, only the new JPT on NextGen UI feature is available – the old JPT feature is not supported. Therefore, all current JPT users on the existing UI who want to continue to use it on NextGen UI need this migration.

IMPORTANT NOTE: Users of JPT must all be on the same version – either JPT for legacy UI or JPT for NextGen UI. It is not possible to have groups of JPT users on different versions within the same customer.

3. Can all users migrate from the current JPT to the new JPT immediately?

JPT functions are being introduced in rolling releases. If you need specific functions, you have an option to wait for the function. Most users will want to know about and implement the following functions:

Status	Function	Note
Released	Route search Commuter pass UI for users and admins Commuter Pass admin Employee import (Professional only) Approvers & Processor support Concur Mobile (iOS and Android) and iPad Existing IC card e-receipt solution on Web and Mobile Favorite routes on Web and Mobile Audit rules	
Planned Release	BI (Reporting)	Find release notes for upcoming information.
Not Planned	Manual Entry JPT-specific menu on Mobile	These functions are obsolete on JPT on NextGen Expense and will be deprecated.

Steps

You can find the required migration steps in the table below. Instructions for each step are described in the latter part of this document.

Before Migration			
Step	Responsible Party	Activity	Note
1	Customer (Admin / All Users)	If necessary, check current commuter pass to re-register them after Migration. Note: Please refer to the section below for details on the commuter pass.	Professional Edition Only Admin can export commuter pass.
2	Customer (Admin)	Make sure that you are not using "Multiple Route Legs" for JPT IC Card. If you use it, raise a case to update this setting to "Single Route Legs" to Concur.	
3	Customer (All Users)	Make sure all in-flight expense entries of JPT on the existing UI are submitted: <ul style="list-style-type: none"> All unsubmitted or returned expenses using JPT 1.0 will need to be deleted from the expense report and created again on JPT on NextGen UI. Available Expenses from the Network IC Card Reader will not be available after you migrate to JPT on NextGen UI. All favorites will be cleared. As needed, identify current favorite information in order to re-register as new favorites after Migration. 	Data of JPT on the existing UI will NOT be editable after Migration.
4	Customer (Admin / All Users)	Check the other items of the migration guide for Audit Rule, Intelligence, and so on.	
Configuration/Feature Activation (Enable JPT on NextGen UI)			
Step	Responsible Party	Activity	Note
5	Customer (Admin)	Raise a case to enable JPT on NextGen UI. This change forces <u>all</u> users in your groups using JPT to move to NextGen UI.	
6	Concur	Enable JPT on NextGen UI	

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After Migration			
Step	Responsible Party	Activity	Note
7	Customer (Admin / All Users)	If necessary, set commuter passes. Note: Please refer to the section below for details on the commuter pass.	
8	Customer (All Users)	If necessary, register new favorite routes.	Existing favorite routes will be cleared and will not be carried over.
9	Customer (Admin)	If necessary, create Intelligence reports, change audit rules, and do the remaining optimization that is referred to in the latter part of this guide.	

Migration Guide

1. Before Migration

Customers who want to migrate from JPT on the existing UI to JPT on NextGen UI must resolve the following items **BEFORE THE MIGRATION**.

(1) What all users need to consider for the functions:

a. Commuter Pass

Commuter Pass will not be carried over. Manual operation is required if you continue to use it. Refer to the following sections for instruction.

b. Favorite Route

Favorite Route will not be carried over and current ones will be cleared after the migration. All users will need to create their favorites again in the new feature.

(2) What admins need to do before the migration

a. Commuter Pass

[Professional Edition] Admins can export commuter pass information from the menu. There is no specific limit on exporting the

passes at once, but the export operations can be divided into multiple times if necessary.

Administration > Company > Tools > Commuter Pass Admin

Search commuter pass to export and click **Send to Excel** at the bottom of the window.

[Standard Edition] Admins can check Commuter Pass information from the menu below.

Administration > Expense Settings > Expense

- 1) In the **Access to Concur** section, on the **User Accounts** tab, click **Edit**. The **Users page** appears.
- 2) On the **Users** page, double-click the user's name to access the **Edit User** page.
- 3) Scroll to the bottom of the **Edit User** page.
- 4) Click the arrow to access the **Commuter Pass Route** section to check the user's commuter pass info.

Note: Users will need to re-register the commuter pass (Refer to the sections for end-users).

b. Audit Rules

Current audit rules related to JPT do not require any changes as they will continue to function in the same manner on JPT on NextGen UI, with the following exceptions.

- 1) JPT on NextGen UI does not support the itemization functionality. For the itemized JPT expense audit rules to work both on JPT 1.0 and on JPT on NextGen UI, customer admins should modify audit rules before migrating.
- 2) In the NextGen UI, only the event **Entry Save** is presently supported. Entry Submit and Report Submit will be supported in the next planned releases.

Audit Rules

Custom Random

1 Audit Rule 2 Conditions 3 Exception

Name:
JPT AR1

Event:
Entry Save

Editable By:
Global

Applies To:
Global

Active:
Yes

Only **IC Card** and **Route Search** is supported in the **Source/Type Classification** fields. No manual entry of the route is supported.

Audit Rules

Custom Random

1 Audit Rule 2 Conditions 3 Exception

Insert Remove

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

Current Audit Rules Set

Entry | Expense Type | Equal | Value | Japan Public Transportation

And

Entry | Transaction Type | Equal | Value | Itemized entry on an expense

Modified Audit Rules set

Entry | Expense Type | Equal | Value | Japan Public Transportation

And

(Entry | Transaction Type | Equal | Value | Itemized entry on an expense

OR

Entry | Transaction Type | Equal | Value | Expense without itemization)

Audit Rules

Custom Random Validation

1 Audit Rule 2 Conditions 3 Exception

Insert Remove

Data Object/Operator	Field/Value	Operation
<input type="checkbox"/> []	Entry: Expense Type	
Equal	Value: Japan Public Transportation	[]
<input checked="" type="radio"/> And <input type="radio"/> Or		
<input type="checkbox"/> ([]	Entry: Transaction Type	
Equal	Value: Itemized entry on an expense	[]
<input type="radio"/> And <input checked="" type="radio"/> Or		
<input type="checkbox"/> []	Entry: Transaction Type	
Equal	Value: Expense without itemization	[]
<input checked="" type="radio"/> And <input type="radio"/> Or		
) []

c. Receipts Limits (Professional Edition Only)

Current receipt limits related to JPT on the existing UI do not require any change as they will not have any negative impact on JPT on NextGen UI.

d. Multiple Lines on a JPT Expense Entry

Multiple Route Legs will not be supported on JPT on NextGen UI. Users cannot create a JPT expense entry with multiple lines. SAP Concur recommends working with Concur Client Support to modify the e-receipt sending configuration as soon as possible.

This must be completed BEFORE the migration. Do not expect it to happen automatically at the migration.

e. Network IC Card Reader

No specific configuration is required for the migration. However, end-users need to take care of the Available Expense. Refer to the following sections for end-users.

f. Reporting (Analytics / Intelligence)

Existing JPT-related items and reports are only for data items of JPT on the existing UI. Users need to create a new report for JPT on NextGen UI in order to continue the same analytics. Check the operation at the first step.

Data items for JPT on NextGen UI differ from the current ones. Therefore, users must be aware of the following specifications.

- Current reports and data items for JPT on the existing UI can export only data of JPT on the existing UI. They are not for JPT on NextGen UI.
- New reports and data items for JPT on NextGen UI can export only data of JPT on NextGen UI. They are not for JPT on the existing UI.

If users want to have similar reports for JPT on the existing UI, they need to have new reports. Check if you have such reports before migration.

How to make such new reports will be described in this guide once the information becomes available. Refer to the *After Migration* section.

(3) What end-users need to do before the migration

a. Commuter Pass

The Commuter Pass will not be carried over. If users want to continue using them, they must re-register them. In case of re-registration, check your Commuter Pass routes in advance.

The reason why the commuter pass is not carried over is that the Route Search engine has changed.

Commuter Pass Information can be checked in the menu below.

Profile > Profile Settings > Expense Settings > Commuter Pass Routes

b. Favorite Routes

Favorite Routes will not be carried over. If users need to continue using them, they need to re-register them. In the case of re-registration, check your Favorite Routes in advance.

The reason why the Favorite Routes feature is not carried over is that the Route Search engine has been changed.

c. Existing Expense Reports and Entries

All expense reports and entries related to JPT on the existing UI need to be completed before the migration because they will become read-only after the migration. Though some fields, such as comments or business purpose, will still be editable, users cannot do route searches again. Users must make sure to submit their entries of JPT on the existing UI and must have ongoing reports go through the workflow until SAE extract.

Reports and entries on Concur Mobile must be taken care of as well.

d. Concur Mobile

Creating Entries of JPT on the existing UI will not be carried over. The menu cannot be referred to after the migration. Users must complete expense as well as the before section: a.

e. Network IC Card Reader

End-users need to take care of Available Expenses because there are some restrictions:

- i. [For Railway Data] Available Expenses imported BEFORE THE MIGRATION will NOT BE AVAILABLE after the migration because they are related to JPT on the existing UI. End-users are recommended to process them before the migration or dispose of them.
- ii. [For Railway Data] Available Expenses imported AFTER THE MIGRATION will be of the new JPT data.
- iii. [For Bus/Purchasing] Available Expenses will not be affected by the migration. Even after the migration, users CAN use data imported before the migration.

2. Configuration/Feature Activation (Enable JPT on NextGen UI)

Customers must contact Concur Client Support via client case to initiate these processes. Only authorized operators in SAP Concur can enable JPT on NextGen UI.

IMPORTANT NOTE: Users of JPT must all be on the same version – either JPT for legacy UI or JPT for NextGen UI. It is not possible to have groups of JPT users on different versions within the same customer.

(1) Switch to NextGen UI

Customers must recognize that after the next step, they are to go to NextGen UI.

(2) Enable JPT on NextGenUI

As described above, Concur Admin will perform this step. During the process, customers are required not to touch JPT (for both JPT on the existing UI and JPT on NextGen UI).

Avoid accessing reports with JPT expense entry till you get an enablement completion notice from the Concur Admin. There is a possibility that intermittent errors or interruptions can occur if the user is trying to open, modify or update JPT expense during the activation process by Concur Admin.

3. After Migration

(1) What all users need to consider for the functions:

a. UI

JPT on NextGen UI is available only on NextGen UI. To use it, users must switch to NextGen UI.

b. Manual Entry of JPT

Manual Entry of JPT will NOT be supported because JPT on NextGen UI can reflect updates of its route search engine immediately. Users do not need to modify their route manually and must use the search tools.

c. Network IC Card Reader

JPT on NextGen UI expands its route search scope to include bus data. However, IC Card Reader will not import bus data on IC cards as JPT entries. Bus data on IC cards will continue to be regarded as user-specified expense type but JPT.

No consideration is required for Purchasing data.

d. Commuter Pass

Commuter Pass information will not be carried over. Manual re-registration is required if you continue to use it.

e. Favorite Route

Favorite Route will not be carried over. All users must consider that their previously registered favorite routes will no longer be available. Users can create new favorites via route search on JPT on NextGen UI.

f. Concur Mobile

Path to JPT will be changed on JPT on NextGen UI: Users can create JPT entries inside expense reports to add new entries.

The previous link in the hamburger menu will disappear, which allows users to call route search from the hamburger menu in the top right.

No specific configuration is required. To reflect the change, users may need to log out and log in to Concur Mobile again.

(2) What admins need to do after the migration:

a. Manual Entry of JPT (deprecated)

As described above, Manual Entry of JPT will not be supported on JPT on NextGen UI. If users dare to have an expense type as "Manual Entry of JPT", they can create a normal expense type instead. Contact SAP Concur Support for it.

b. Commuter Pass must be re-registered

Commuter Pass will not be carried over automatically. Any users must consider that their previously registered commuter passes will no longer be available. It can be added using the following methods:

- Commuter Pass Admin

Authorized users can add commuter pass from the menu below.

Administration > Company > Tools > Commuter Pass Admin (Professional Edition)

Administration > Expense > Expense Settings > Capturing Spend > Commuter Passes (Standard Edition)

c. Reporting (Analysis / Intelligence)

Reporting functions have no compatibility between JPT on the existing UI and JPT on NextGen UI.

- Data items under JPT on The existing UI and existing data will be stored "as is." They can be referred (to) with previous reports. Reporting service is fetching data from the core expense, and this process will still be available.
- Data items of JPT on NextGen UI are not available for previous reports. They will be able to be referred (to) only in new Intelligence Reports. How to make it will be updated here in the future.

d. Reporting (Intelligence)

Default reports as below will be available with the coming release. Consider switching operations with them from reports for JPT on the existing UI.

- IC Card Usage Rate

- Transportation Detail

Due to the data structure of JPT on NextGen UI, one route will have one line on this new report. It has a different type of information for via stations.

(3) What end-users need to do after the migration:

- a. Expense Reports and Entries

Data on JPT on the existing UI will still be accessible, but they will be read-only. These items are still editable: Comment/Business Purpose.

If there are in-flight Expense Reports and Entries with JPT on the existing UI, they still can be submitted, declined, and disposed of.

JPT entries requiring edits must be deleted from the report and re-created.

Sample Schedule

Migration schedules can vary among customers since they have individual operations for each. However, a sample schedule here may help to plan the migration.

(1) Plan the migration: A month before the migration

- Consider the target date. You may need to freeze expense operations around it.
- Request the configuration change to Concur Support: At least two weeks before the planned migration date.

(2) Preparation before the migration: 1-2 weeks

(3) Configuration/Feature Activation: A day

(4) After migration: 1 week or more

Remarks

- IMPORTANT: Once switched to JPT on NextGen UI, there is no way to roll it back to JPT on the existing UI. For more information, refer to the FAQs and the restriction document.
- JPT configuration affects the entire entity. Customers must turn on JPT on NextGen UI for the entire entity.

Questions and Answers

1. Can implementing projects on the existing UI switch to JPT on NextGen UI?

Yes, implementing projects also can be switched to JPT on NextGen UI, but be aware that data items of JPT on the existing UI will be affected as described above.

2. Can an individual group start to use JPT on NextGen UI while the other groups on the same entity are NOT using JPT on the existing UI?

JPT 2.0 only works on NextGen UI. Activating JPT 2.0 on NextGen UI can only be done at an entity level. It cannot be done at the group or user level. Hence, if multiple groups use JPT, it is impossible to activate JPT 2.0 for one group. All must move to JPT 2.0 (+NextGen UI) on the same schedule.

Groups not using JPT can choose not to activate NextGen UI at the group or user level and remain on the existing UI. But groups that use JPT must move to NextGen UI to use JPT 2.0.

For example, there are two groups that use JPT 1.0 and a third group that uses Invoice. The third group can remain on the existing UI, and the first two groups that use JPT must move together to NextGen UI to use JPT 2.0.

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

3. Will complete parity of the current functions of JPT on the existing UI be provided?

There are functional changes. Each parity item will be released as planned, and notice will be provided in the upcoming release notes. Refer to the Overview section of this guide and each description for further detail about outstanding parity items.

4. When can we migrate?

If you have **NOT USED** JPT on the existing UI, you can go to NextGen UI and JPT on NextGen UI at any time.

If you do not consider any outstanding parity items, you may plan the migration using the steps referenced above. Actual migration will be able to run with further announcement of SAP Concur.

