

Concur Expense: JPT on NextGen UI – Commuter Pass Import

User Guide

Last Revised: October 14, 2022

Applies to these SAP Concur solutions:

- ☒ Expense
 - ☒ Professional/Premium edition
 - ☐ Standard edition
- ☐ Travel
 - ☐ Professional/Premium edition
 - ☐ Standard edition
- ☐ Invoice
 - ☐ Professional/Premium edition
 - ☐ Standard edition
- ☐ Request
 - ☐ Professional/Premium edition
 - ☐ Standard edition

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Revision History

Date	Notes / Comments / Changes
October 14, 2022	Updated the requirement for the Start Date field as Yes for Commuter Pass Import.
August 26, 2022	Updated field descriptions
January 21, 2022	Updated the copyright year; no other changes; cover date not updated
August 27, 2021	Updates to new guide to reflect feature name change to JPT on NextGen UI along with other minor content updates.
June 30, 2021	New guide.

Commuter Pass Import

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 Concur administrator.

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

Section 2: Overview

The Commuter Pass Import allows administrators to add one or multiple commuter pass routes for multiple users.

Section 3: Using the Commuter Pass Import Feature

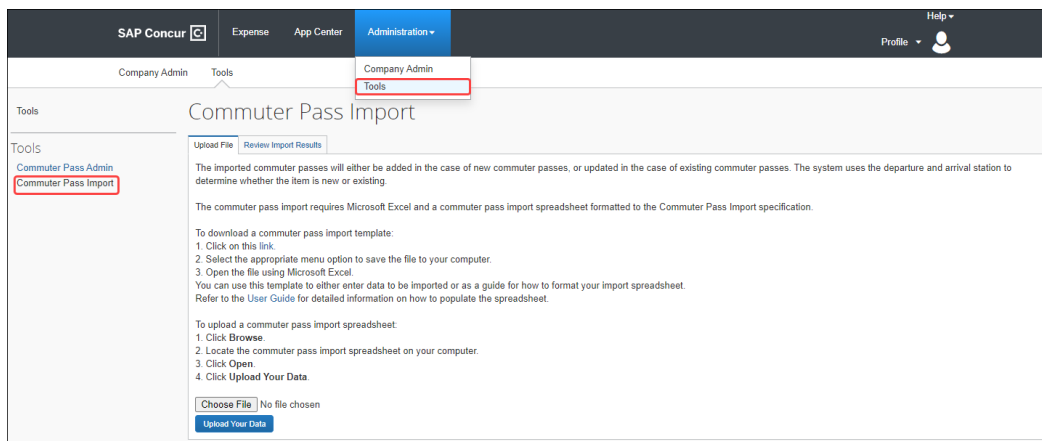
Administrators can use the **Commuter Pass Import** page whenever they need to add additional passes and routes.

Section 3: Using the Commuter Pass Import Feature

Accessing the Commuter Pass Import Page

► To access the Commuter Pass Import page:

1. Click **Administration > Company > Tools**.
2. In the left menu, click **Commuter Pass Import**. The **Commuter Pass Import** page appears:



The Commuter Pass Import Process

The Commuter Pass Import process has five steps:

1. Downloading the commuter pass spreadsheet
2. Populating the commuter pass spreadsheet
3. Uploading the commuter pass spreadsheet
4. Viewing the initial field validation results
5. Viewing the import results

Step 1: Downloading the Commuter Pass Spreadsheet

The administrator can download the commuter pass spreadsheet to use as a template for their import.

► To download the commuter pass spreadsheet:

1. On the **Commuter Pass Import** page, click **link**.

Section 3: Using the Commuter Pass Import Feature

Commuter Pass Import

[Upload File](#)[Review Import Results](#)

The imported commuter passes will either be added in the case of new commuter passes, or updated in the case of existing commuter passes. The system uses the departure and arrival station to determine whether the item is new or existing.

The commuter pass import requires Microsoft Excel and a commuter pass import spreadsheet formatted to the Commuter Pass Import specification.

To download a commuter pass import template:

1. Click on this [link](#).
2. Select the appropriate menu option to save the file to your computer.
3. Open the file using Microsoft Excel.

You can use this template to either enter data to be imported or as a guide for how to format your import spreadsheet. Refer to the [User Guide](#) for detailed information on how to populate the spreadsheet.

To upload a commuter pass import spreadsheet:

1. Click **Browse**.
2. Locate the commuter pass import spreadsheet on your computer.
3. Click **Open**.
4. Click **Upload Your Data**.

No file chosen

The Excel spreadsheet is automatically downloaded and saved to your default **Downloads** location.

2. Go to the default Downloads location and open the spreadsheet.

Step 2: Populating the Commuter Pass Spreadsheet

Data may be entered directly in the template spreadsheet, or the template can be used as a guide for creating the commuter pass spreadsheet. All fields in blue, Start Date, and Reference field are required and must have values for a successful import.

	A	B	C	D	E	F	G
1	EmployeeID	Delete	FromStationName	ToStationName	StartDate	EndDate	Reference
2	EmployeeID	Delete?	From Station Name	To Station Name	Start Date	End Date	Reference
3	angiesmith		TOKYO	KOFU	20210701		
4	angiesmith		OSAKA	HIMEJI	20210701		
5	angiesmith		OSAKA	HIMEJI	20210701		
6	angiesmith		HACHIOJI	KOFU	20210701		

IMPORTANT – FORMATTING ISSUES

The user import spreadsheet has these formatting requirements:

- The values in the spreadsheet header row must not be deleted.
- All cells in the spreadsheet must have a **Number Format** of **Text** before being uploaded.

If you use the Replace feature in Excel, be aware that it may not maintain the required cell formatting. Testing has shown that cells formatted as text become general format after using Replace. If the cells are not formatted as text, the import will fail.

If you use this feature, always verify the cell formatting when done. If necessary, select the appropriate cells and change the formatting.

Section 3: Using the Commuter Pass Import Feature

DELETING A COMMUTER PASS

The **Delete?** column in the spreadsheet is only used when a specific commuter pass route must be removed for an employee.

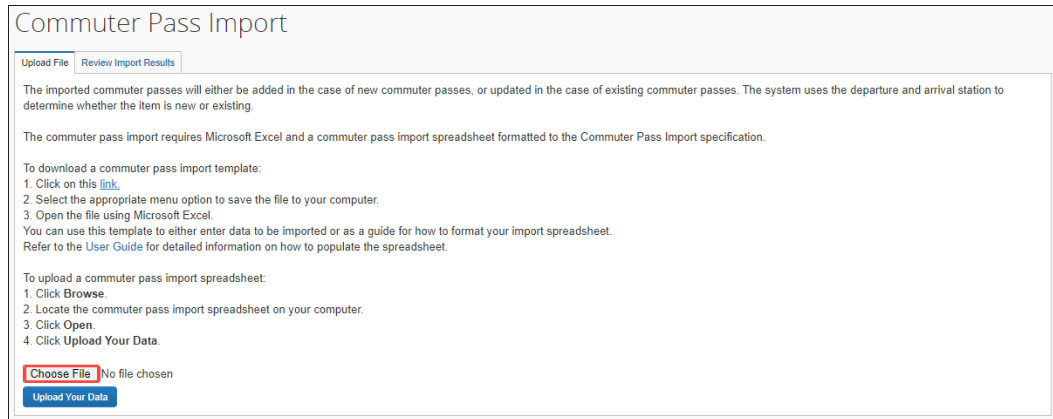
If an entry is marked for delete as Y or Yes, the system checks for the Employee ID, Start Date, and End date to find the corresponding Commuter Pass record from the table to delete it. For all other records (where the delete flag is not set) it verifies the End Date (to delimit) of an existing commuter pass (if there exists with the same Start Date) and adds a new commuter pass based on the input record.

Step 3: Uploading the Commuter Pass Spreadsheet

The commuter pass spreadsheet is uploaded on the **Commuter Pass Import** page.

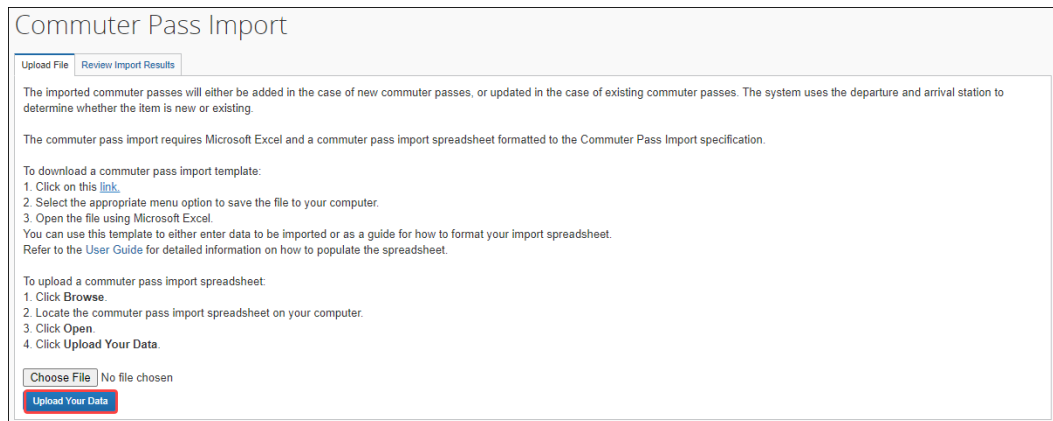
► To upload the commuter pass spreadsheet:

1. On the **Commuter Pass Import** page, click **Choose File**.



The screenshot shows the 'Commuter Pass Import' page. It has two tabs: 'Upload File' (active) and 'Review Import Results'. The main content area contains instructions for importing commuter passes, including a link to download a template and steps for uploading a spreadsheet. At the bottom, there is a 'Choose File' button (highlighted with a red box) and an 'Upload Your Data' button. The text 'No file chosen' is displayed next to the 'Choose File' button.

2. Navigate to the correct location and select the commuter pass spreadsheet to upload.
3. Click **Open**.
4. On the **Commuter Pass Import** page, click **Upload Your Data**.



This screenshot is identical to the one above, showing the 'Commuter Pass Import' page. However, in this version, the 'Upload Your Data' button is highlighted with a red box, while the 'Choose File' button is no longer highlighted.

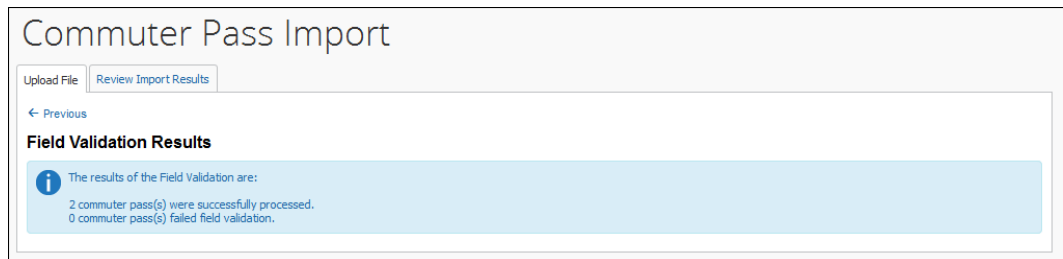
Step 4: Viewing the Initial Field Validation Results

The **Commuter Pass Import** page allows administrators to view the results of the initial field validation of the uploaded file. This field validation allows administrators to identify records with the most common types of issues that need to be corrected prior to being eligible for import. The field validation validates whether required fields have values and that provided values match the field's data type.

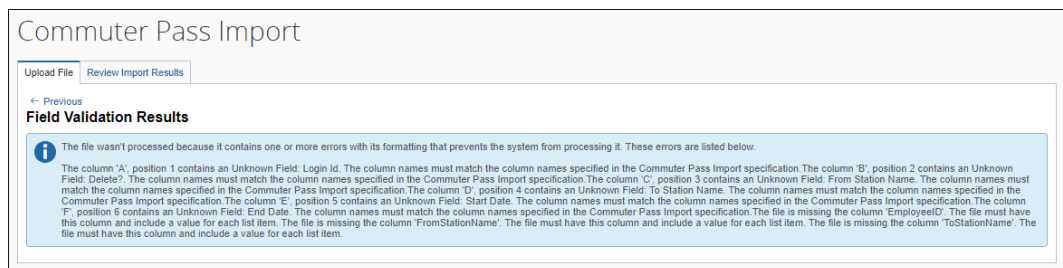
Records that meet the field validation are immediately queued for import into the system. Records failing this validation must be corrected in the spreadsheet file and the corrected file re-uploaded. This validation happens before valid records are queued for import.

► To view the initial field validation results:

1. On the **Commuter Pass Import** page, after you click **Upload Your Data**, the **Field Validation Results** appear. The results will display the number of commuter passes that were successfully processed and those that failed field validation.



2. Review the details of the validation. If the validation found any errors in the file, the details are presented on this page.



Step 5: Viewing the Import Results

Once the administrator clicks **Upload Your Data**, the eligible records are queued for import. The system processes these as soon as possible. It may take the system a few minutes to process queued records. Provided there are no further errors in processing the records, the system will import the commuter pass routes.

The administrator can use the **Review Import Results** tab to view the status of the import as well as the import details, including any errors generated. Once the administrator selects the date, the page displays the status of all imports from 10 days prior to and including the day selected, the number of records processed, and

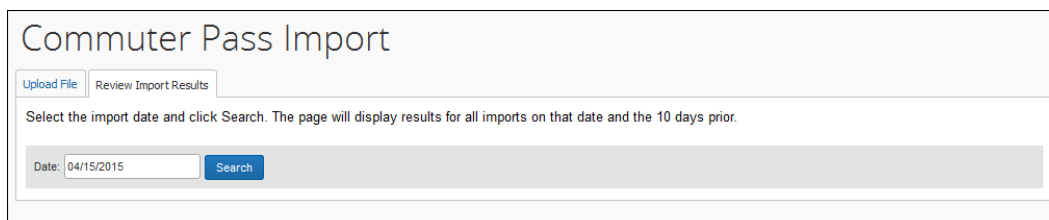
Section 3: Using the Commuter Pass Import Feature

the number of records rejected. This list is sorted in descending order by the time the administrator imported the file.

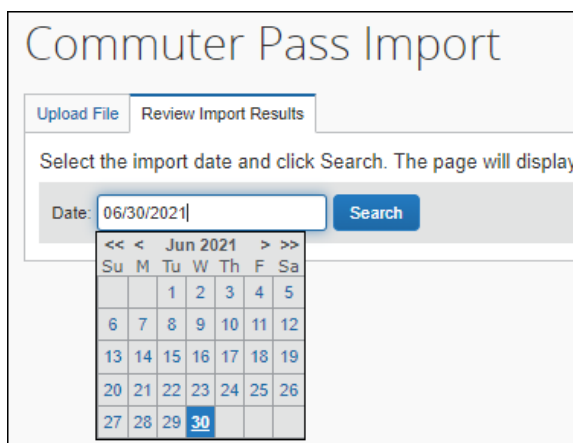
The **View Import Details** page displays any errors that may have occurred during the import.

► To view import results:

1. Click the **Review Import Results** tab. The **Review Import Results** page appears.



2. Click the **Date** field and select the required date.



3. Click **Search**. The page displays all files imported on the specified date and 10 days prior.

The **View Import Details** page allows administrators to view details about processed records from a particular file. Here the administrator can view details about:

- **Records with Errors:** The page displays the row number in the spreadsheet with the error that prevented the record from being imported. The **Description** and **Action To Take** columns provide the information necessary to correct the issue. These records must be corrected in this file and then re-uploaded.
- **Records with Warnings:** The page displays the row number in the spreadsheet where the system successfully imported the record, but there might an issue the administrator should investigate. The **Description** and **Action To Take** columns provide the warning information. The administrator should consider the warning and decide whether the issue warrants further

Section 3: Using the Commuter Pass Import Feature

investigation. The administrator can review the commuter pass record in the spreadsheet file, make any necessary edits there, and then re-upload the corrected file.

- **Records without Warnings or Errors:** The page displays the row number in the spreadsheet where the system successfully imported the record.

► **To view import details:**

1. Click **View** in the selected row of the **Review Import Results** list.

Commuter Pass Import

Upload File | Review Import Results

Select the import date and click Search. The page will display results for all imports on that date and the 10 days prior.

Date: 06/30/2021 Search

File Name	Date	Status	Initiated By	Records Processed	Records Rejected	Details
CommuterPassImportTemplate.xls	6/30/2021 8:26:11 PM	Completed with Errors		4	4	View

The **Review Import Details** page appears, displaying records with errors.

Commuter Pass Import

Upload File | Review Import Results

← Previous

Type: All Search

Type	Record	Description	Action To Take
Error	1	Employee id is not found.	Correct the employee id and re-import the file.
Error	2	Employee id is not found.	Correct the employee id and re-import the file.
Error	3	Employee id is not found.	Correct the employee id and re-import the file.
Error	4	Employee id is not found.	Correct the employee id and re-import the file.

2. Select the issue to display under **Type** and click **Search**. The details are filtered to show records imported without errors or warnings, records with warnings, records with errors, or all records.

Commuter Pass Import

Upload File | Review Import Results

← Previous

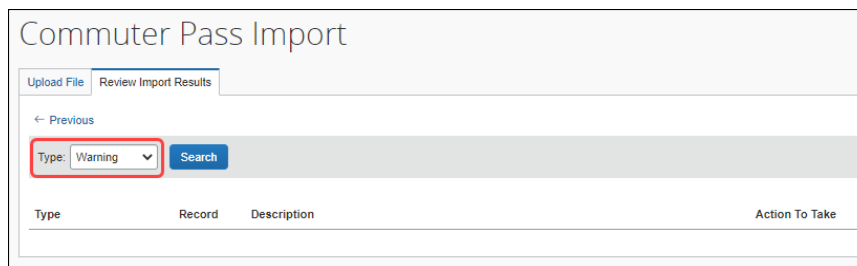
Type: Error Search

Type: All Information Warning Error

Type	Record	Description
Error	1	Employee id is not found.
Error	2	Employee id is not found.
Error	3	Employee id is not found.
Error	4	Employee id is not found.

Section 4: File and Field Formats

NOTE: If the search yields no results for the selected issue type, the table will be empty. You will also have no action to take.



The screenshot shows the 'Commuter Pass Import' interface. At the top, there are two tabs: 'Upload File' and 'Review Import Results'. Below the tabs, there is a 'Previous' link and a search bar. The search bar has a 'Type' dropdown menu set to 'Warning' and a 'Search' button. Below the search bar, there is a table with the following columns: 'Type', 'Record', 'Description', and 'Action To Take'.

3. Review the **Description** and **Action To Take** columns for details about any records with errors.

Section 4: File and Field Formats

This section contains formatting information for the commuter pass fields that appear in the spreadsheet. Each field represents a column in the spreadsheet. The column order in the spreadsheet must match the field order listed below.

Field	Format	Required	Definition
Employee ID	48 characters maximum	Y	Defines the employee (for example, JSMITH)., and must be a unique identification for each employee.
Delete?	Y (Yes) N (No - Default)	N	Delete this commute route from the system? If it is set to Y, system logic checks a combination of Employee ID, Start Date, and End Date to identify the commuter pass record to be deleted.
From Station Name		Y	Commuter pass departure station name.
To Station Name		Y	Commuter pass arrival station name.
Start Date	8 characters maximum in format YYYYMMDD	Y	The start date of the commuter pass. NOTE: This record will fail if the calendar day value of Start Date or End Date falls within the date range of an existing commuter pass.
End Date	8 characters maximum in format YYYYMMDD	N	The end date of the commuter pass. NOTE: This record will fail if the calendar day value of Start Date or End Date falls within the date range of an existing commuter pass.
Reference	Departure Station Name: Line Name:	Y	Dedicated strings for Ekispart Engine to do commuter pass deduction calculation. For example

Section 4: File and Field Formats

Field	Format	Required	Definition
	Direction: Via Station Name: Line Name: Direction: Arrival Station Name		<p>Example of reference : 高円寺: J R 中央 線快速:Up:新宿: J R 山手線外回り :Down: 池袋</p> <p>The example commuter pass route is from Koenji(高円寺) to Ikebukuro(池袋) via station Shinjuku(新宿), using JR Chuo Line express (JR 中央線快速) upward and JR Yamanote Line(JR 山手 線) downward.</p>

