Concur Request: Segment Types

Setup Guide

Last Revised: October 1, 2022

Applies to these SAP Concur solutions:

- \Box Expense
 - □ Professional/Premium edition□ Standard edition
- 🗆 Travel
 - Professional/Premium edition
 Standard edition
- □ Invoice
 - Professional/Premium editionStandard edition
- 🗵 Request
 - ⊠ Professional/Premium edition
 - $\hfill\square$ Standard edition

Table of Contents

Section 1:	Permissions	1
Section 2:	Overview of Concur Request	1
Section 3:	Concur Request Configurations	1
Section 4:	Overview of Segment Types	2
Reques	t Policies and Default Segment Types	3
Section 5:	End-User Experience	3
Navigat	ing Between Expected Expenses and Segments	5
Section 6:	Manage Segment Types	7
Accessi	ng Segment Types	7
Creating	g a New Request Segment Type	7
Modifyiı	ng a Segment Type	9
Removi	ng a Segment Type	9

Revision History

Date	Notes / Comments / Changes		
October 1, 2022	Updated screenshots and edited content for the new user experience in the <i>Overview of Segment Types</i> and <i>End-User Experience</i> sections.		
January 21, 2022	Updated the copyright year; no other changes; cover date not updated		
March 29, 2021	Updated the copyright year; no other changes; cover date not updated		
July 20, 2020	Removed the <i>Request/Authorization Request/Concur Request</i> section to align with Concur Request product branding.		
June 5, 2020	Changed "Authorization Request" to "Concur Request" in Request guide references to align with Concur Request product branding.		
June 3, 2020	Changed "Authorization Request" to "Concur Request" in guide title to align with Concur Request product branding.		
April 22, 2020	Renamed the Authorization Request check box to Request on the guide's title page; cover date not updated		
January 10, 2020	Updated the copyright; no other changes; cover date not updated		
January 18, 2019	Updated the copyright; no other changes; cover date not updated		
April 11, 2018	Changed the check boxes on the front cover; no other changes; cover date not updated		
February 28 2018	Updated the copyright; no other changes; cover date not updated		
December 14 2016	Changed copyright and cover; no other content changes.		
October 20 2016	Updated the <i>Permissions</i> section and guide content to new corporate style; no content changes.		
June 12 2015	Updated the screen shots to the enhanced UI; no other content changes		
September 19 2014	Added information about two user interfaces; no other content changes.		
September 12 2014	Updated What the User Sees.		
February 11 2014	 Added information about requests that do not require segments Removed references that Agency Proposals is available only in France; it is now available worldwide 		
January 20 2014	Cover and copyright changes; no other content changes		
March 4 2013	Added a note that the Agency Proposals feature is available only in France		
February 26 2013	Name change from "Travel Request" to "Request" – <i>no other content</i> changes		
December 28 2012	Made rebranding and/or copyright changes; no content changes		
March 6 2012	Made rebranding and/or copyright changes; no content changes		
July 22 2011	User interface changes - "Request" changed to "Travel Request" - updated menu options and screen shots		
June 3 2011	Changed occurrences of "Request" to "Travel Request" - no other changes to content		

Date	Notes / Comments / Changes
May 31 2011	New segment icons
March 18 2011	Added information about the Dining, Event, and Miscellaneous segment types
January 21 2011	Changes:Update to match current feature setUpdated the copyright and made rebranding changes
October 15 2010	Initial publication

Segment Types

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. In this case, the client must initiate a service request with SAP Concur support.

Section 2: Overview of Concur Request

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: Concur Request Configurations

Not all Concur Request features are available for all Concur Request implementations.

Implementation	Is this feature available?
Stand-alone	Yes, Optional
Integrated with Concur Expense (but not Concur Travel)	Yes, Optional
Integrated with Concur Travel (but not Concur Expense)	Yes, Required
Integrated with Concur Expense and Concur Travel	Yes, Required

NOTE: Not all requests require segments. For example, requests designed **only** for the pre-approval of cash advances do not require segments.

Section 4: Overview of Segment Types

Segment types are the available travel-related "categories" that a traveler can use in a request, such as air, car, etc.

CONCUR Request Tavel Expense Invoice App Center Profile	_									Administration -	Help 🗸
Company Request Tavel Admin Locale Expense Invole Request Admin Segment Types where: Segment Types where: Segment Types where: Segment Types where: Audit Rules Sogment Types where: Segment Types where: Segment Types where: Segment Types where: Company info Company info Segment Types where: Segment Type Segment Type Company info Company info Segment Types informe Segment Type Segment Type Company info Company info Segment Type Segment Type Segment Type Delegate Company info Company info Segment Type Segment Type Segment Type Company info Company info Segment Type Segment Type Segment Type Delegate Control Segment Type Segment Type Segment Type Segment Type Delegate Control Segment Type Segment Type Segment Type Segment Type List Attaget Release Delegate Control Segment Type Segment Type Segment Type List Attaget Release Delegate Control Segment Type Segment Type Segment Type Segm	C. CONCUR	Requests	Travel	Expense	Invoice	Approvals	Reporting -	App Center		Profile	- 🔍
Request Admin Segment Types where: Audit Rules Segment Types where: Booking Switch Compary ling Congray ling Segment Types impression Contray Courses Ar Total Brail Reminders Faile Impression Exceptions Faile Impression Fature Heartchies Faile Impression Fature Heartchies Faile Impression Lications Faile Impression Printed Reports Faile Impression Request Groups Faile Impression Fature Heartchies Faile Impression Printed Reports Faile Impression Request Groups Faile Impression Statust Reports Faile Impression Request Groups Faile Impression Statust Reports Faile Impression <td>Company 🗸</td> <td>Request</td> <td>Travel Admin</td> <td>Locate -</td> <td>Expense</td> <td>Invoice</td> <td></td> <td></td> <td></td> <td></td> <td></td>	Company 🗸	Request	Travel Admin	Locate -	Expense	Invoice					
Request Admin Find Segment Types where: Segment Type Addit Rules Segment Type Search Booking Switch Core Core Change Log Core Segment Types Segment Type Contrary Groups Segment Types Segment Type Segment Type Contrary Groups Air Ticket Image Type Segment Type Segment Type Currency Admin Railway Ticket Image Type Segment Type Yes Currency Admin Railway Ticket Image Type Segment Type Yes Email Reminders Hote Reservation Image Handing Yes Yes Email Reminders Tace I are Image Handing Yes Yes Image Handing Paring Fee Image Handing Yes Yes Image Handing Paring Fee Image Handing Yes Yes Localization Segment Yipes Yes Yes Yes Localization Segment Yipes Yes Yes Yes Localization Segment Yipes Yes Yes Yes Localization	Request Admin		Segme	ent Ty	pes						
Company InfoSegment TypesSegment TypesSegment TypesSystem recordContry GroupsAir TicketIYesCourtery AdminRailway TicketIYesDelegate ConfigurationsCar RentalIYesEmail RemindersHotel ReservationIYesExceptionsTaxi FareIYesFeature HierarchiesLinoxine ReservationIYesImage HandlingParking FeeI7YesImage HandlingParking FeeI7YesLocalizationEventIIYesLocalizationEventIIYesPrinted ReportsAir subscriptionIYesYesPrinted ReportsRequest GroupsInsuranceIYesSettingsToruanceIYesYesEvent IrrainsIsuranceIYesYesPrinted ReportsRail subscriptionIYesYesSettingsTuranceIYesYesSte SettingsText AdminIYesYesTraining AdministrationTraining AdministrationYesYesTraining AdministrationYesYesYesWorkflowsVerkYesYes	Request Admi Audit Rules Booking Switch Change Log	in	Find Segment Type	ypes where:	·			Search			
County Groups Air Ticket 1 Yes County Groups Railway Ticket 2 Yes Delegate Configurations Car Rental 3 Yes Email Reminders Hotel Reservation 4 Yes Exceptions Taxi Fare 5 Yes Feature Hierarchies Limousine Reservation 6 Yes Imaging Settings Ding 1 8 Yes Locations Event 8 9 Yes Locations Air subscription 9 Yes Yes List Management Miscellaneous 9 Yes Yes Locations Air subscription 9 Yes Yes Printed Reports Request Groups Insurance Yes Yes Segment Types Visa 2 Yes Yes Stite Settings Text Admin 2 Yes Yes Visa 2 Yes Yes Yes Workflows Yes Yes Yes Yes	Company Info		Segment Types			Seg	gment Icon	Display ord	er System	record	
Currency Admin Railway Ticket © 2 Yes Delegate Configurations Car Rental © 3 Yes Email Reminders Hotel Reservation © 4 Yes Exceptions Taxl Fare © 5 Yes Feature Hierarchies Limousine Reservation © 6 Yes Image Handling Parking Fee 0 7 Yes Image Handling Parking Fee 0 7 Yes List Management Miscellaneous © 9 Yes Locations Air subscription © Yes 10 Yes Printed Reports Rait subscription © Yes Yes Stet Settings Taxle Ademin © Yes Yes Stet Settings Visa © Yes Yes Visa Ø Yes Yes Yes Yes Stet Settings Taxle Agency Offices Yes Yes Yes Workflows Visa Ø Yes Yes Yes	Configuration Rep Country Groups	ποα	Air Ticket			đ)	1	Yes		
Delegate ConfigurationsCar RentalCar RentalCar RentalEmail RemindersHote ReservationCar RentalYesExceptionsTaxi FareCar RentalYesExceptionsTaxi FareCar RentalYesFeature HierarchiesTaxi FareCar RentalYesForms and FieldsLimousine ReservationCar RentalYesImage HandlingParking Fee7YesImage HandlingParking Fee7YesImage HandlingNicelianeousS9List ManagementMicelianeousS9LocalizationEventCarterYesLocalizationSYesYesPrinted ReportsInsuranceSYesRequest GroupsRel subscriptionCarterYesSite SettingsYesYesYesSite SettingsYesYesYesYesYesWorkflowsYesYes	Currency Admin		Railway Ticket			(2	Yes		
Email Reminders Hotel Reservation 4 Yes Exceptions Taxi Fare 5 Yes Feature Hierarchies Imousine Reservation 6 Yes Forms and Fields Imousine Reservation 6 Yes Image Handling Parking Fee 0 7 Yes Image Handling Parking Fee 0 7 Yes Image Handling Dining 10 8 Yes List Management Miscellaneous 6 10 Yes Localization Event 6 10 Yes Localization Event 6 Yes Yes Request Coroups Insurance S Yes Yes Segment Types Visa 6 Yes Yes Site Settings Yes Yes Yes Yes Training Administration Training Administration Yes Yes Workflows Visite Yes Yes Yes	Delegate Configu	rations	Car Rental			6)	3	Yes		
Exceptions Tad Fare 5 Yes Feature Hierarchies Linousine Reservation 6 Yes Image Handling Parking Fee P 7 Yes Imaging Settings Dining 10 8 Yes Localization Event 3 10 Yes Localizations Event 3 10 Yes Printed Reports Insurance S Yes Yes Request Policies Rel subscription S Yes Yes Site Settings Yes Yes Yes Yes Training Administration Training Administration Yes Yes Yes Workflows Ves Yes Yes Yes Yes	Email Reminders		Hotel Reservation	ı)	4	Yes		
Fedtre Hierarchies Linousine Reservation 6 Yes Image Handling Parking Fee P 7 Yes Imaging Settings Dining III 8 Yes Imaging Settings Dining III 8 Yes List Management Mscellaneous 9 Yes Localization Event IIII 10 Yes Locations Air subscription IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Exceptions		Taxi Fare			6		5	Yes		
Forms and Freids Parking Fee 7 Yes Image landling Iming 10 8 Yes List Management Miscellaneous 9 Yes Localization Event 10 Yes Locations Air subscription 6 Yes Printed Reports Air subscription 6 Yes Request Groups Insurance 6 Yes Segment Types Visa 2 Yes Site Settings Training Administration Yes Yes Trakel Agency Offices Ves Yes Yes	Feature Hierarchi	es	Limousine Reser	vation				6	Yes		
Imaging Settings Dring Imaging Settings Yes List Management Miscellaneous 9 Yes Locations Event Imaging Settings Yes Locations Event Imaging Settings Yes Locations Event Imaging Settings Yes Locations Air subscription Yes Printed Reports Insurance Yes Request Groups Insurance Yes Segment Types Vsa Yes Site Settings Yes Yes Test User Admin Travel Agency Offlices Yes Workflows Vers Yes	Forms and Fields		Parking Fee					7	Yes		
List Management Miscellaneous S 9 Yes Localization Event S 10 Yes Localization Frinted Reports Air subscription S Yes Request Groups Relation S Yes Request Policies Rail subscription S Yes Site Settings Test User Admin Training Administration Travel Agency Offices Workflows	Imaging Settings		Dining					8	Yes		
Localization Event Image: Constraint of the constraint of t	List Management		Miscellaneous			• •		9	Yes		
Locations Ai subscription Control Printed Reports Ai subscription Control Request Groups Insurance Control Request Policies Rail subscription Control Segment Types Vsa Control Setter Admin Control Control Training Administration Training Administration Travel Agency Offices Ves	Localization		Event			N 0		10	Yes		
Printed Reports It statuspath It statuspath Request Groups Insurance It statuspath Request Policies Reil subscription It statuspath Segment Types Ves Yes Stite Settings Yes Yes Test User Admin Yes Yes Training Administration Travel Agency Offices Yes Workflows Yes Yes	Locations		Air subscription			<u> </u>			Ves		
Request Groups Instance Instance Request Policies Rel subscription Image: Second	Printed Reports		Insurance			<u> </u>			Vec		
Net added paint Net added paint Segment Types Yea Site Settings Test User Admin Training Administration Travel Agency Offices Workflows	Request Groups		Rail subscription			<u> </u>			Vec		
Vial Vial Site Settings Test User Admin Training Administration Travel Agency Offices Workflows	Request Policies		Kan subscription			9			Tes		
Test User Admin Training Administration Travel Agency Offices Workflows	Site Settings		VISA			8)		res		
Training Administration Travel Agency Offices Workflows	Test User Admin										
Travel Agency Offices Workflows	Training Administ	ration									
Workflows	Travel Agency Of	lices									
	Workflows										

There are several default segment types:

- Air Ticket
- Railway Ticket
- Car Rental
- Hotel Reservation
- Taxi Fare

- Limousine Reservation
- Parking Fee
- Dining
- Miscellaneous
- Event

NOTE: Other segments – Air subscription, Insurance, Rail subscription, and Visa – are used with the Agency Proposals feature. For more information, refer to the *Concur Request: Agency Proposals Setup Guide*.

The administrator can use this section of Request Admin to:

- Add additional segment types: The administrator can "create" a new segment by copying a default type and then editing the copy.
- **Modify segment types:** The administrator can change the display order of the *default* segments or can make additional modifications to *administrator-created* segments.
- **Remove segment types:** The default segments are system records. The administrator can elect to *not* use a default segment type, but the

administrator cannot remove a *default* segment type. The administrator can remove *administrator-created* segments.

NOTE: If the admin elects to not use any segments (select any segments in the Request policy), then the **Segments** tab does not appear to the user. Having no segments is acceptable for certain types of requests, such as those designed only for the pre-approval of cash advances.

Request Policies and Default Segment Types

Segment types are defined for each request policy. Only four of the default segment types (air, rail, car, and hotel) have been used in the *default* Request policy. The administrator can add or remove as many as desired.

Section 5: End-User Experience

There are multiple ways that a request is created:

- If Concur Request is integrated with Concur Travel, the company can choose between two process flows:
 - **Starting in Concur Request**: The user creates the request manually, then after the request is approved, they are directed to Travel to book the trip.
 - **Starting in Concur Travel**: The user creates a trip in Concur Travel, then Travel creates the request.
- If Concur Request is **not** integrated with Concur Travel, then the user creates the request manually.

Regardless, adding segment types work the same way. Users select from a list of segment types from the **Add** list on the **Expected Expenses** page. The steps for the user to add a segment type to a request are the same as adding an expected expense, but instead of selecting an expense type in the **Add** list, the user selects the applicable segment type.

NOTE: When adding expected expenses and segments, the **Expense Type** list includes the names of both the expense types and the segment types set up for Concur Request. If an expense type has the same name as a segment type, it may appear as if there are duplicate items in the list, when in fact, the list is displaying both the name of the expense type and the name of the segment type.

Manage Requests Process Requests Purchase Requests -	
Trip to Paris \$0.00 👼 Not Submitted Request ID: 333V	Copy Request Submit Request
Request Details Print/Share Attachments	
EXPECTED EXPENSES	
Add - Edit Allocate Delete	
Search for an expense type	enses
^ 02. Transportation	▲ pmit Request
Air Ticket Car Rental Parking Personal Car Mileage	
Railway Ticket	*

NOTE: In the search box at the top of the list, the user can enter all or part of a segment type name. The list of available expense types and segment types shown will be filtered to show only those with matching text.

Once the user selects the segment type, the applicable form appears. The user completes the fields, saves, and selects another segment. When done, the user clicks **Submit Request**.

Manage Requests Process Requests Purchase Requests -	
New Expense: Air Ticket Round Trip One Way Multi City	Cancel Save
Outbound	* Required field
From *	To *
Seattle Tacoma Intl (Airport - SEA), Seattle, Washington	
Date * Depart at *	Comment
10/14/2019 Image: Departure time • 07:00 AM •	
Return	
Date * Depart at *	Comment
10/18/2019 E Departure time • 09:00 AM O	
Amount * Currency *	
629.50 US, Dollar 🗸	

NOTE: The fields that appear on this page are configurable. Refer to the *Manage Segment Types* section in this guide.

Once the user completes the fields and clicks **Save**, the segment type is added to the **Expense Expenses** list.

Manage Requests	Process Requests	Purchase Requests ▼			
Trip to Pa	ris \$629.50 Request ID: 333V	Ē	Сору	Request	Submit Request
Request Details 🔻	Print/Share Attack	iments 🔻			
EXPECTED EX	XPENSES				
Add 👻 E					
Expense type	Details		Date -	Amount	Requested
Air Ticket	Seattle (SI	EA) - Paris (CDG), Round Trip	10/14/2019	\$629.50	\$629.50
			E	timated To	otal: \$629.50

Note the following:

- The complete set of available *segments* is defined by the administrator using **Segment Types**, as described in this guide.
- The complete set of available *forms* for each segment is defined by the administrator using **Forms and Fields**, as described in the *Concur Request: Forms and Fields Setup Guide*.
- The segments and forms that appear for a particular policy are defined by the administrator using **Request Policies**, as described in the *Concur Request: Policies and Groups Setup Guide*.

Navigating Between Expected Expenses and Segments

If a request contains multiple expected expenses and/or segments, on the expected expense or segment details page, left and right navigation arrows are displayed to the left of each expected expense or segment name in the request. The navigation arrows allow users to quickly navigate between the expected expenses and/or segments in the request without having to return to the **Expected Expenses** page.

Manage Requests Pro	ocess Requests	Purchase Requests -					
(← → Roon	n Rate El	JR 491.00					
						Cancel	Save
Allocate							
Transaction Date *				Description			
10/13/2019				Hotel room rate is 98	euros per	night for 5 nights	
Transaction Amount *	Curre	ncy *		Conversion Rate	Reverse	Amount in USD	
491.00	Eur	0	~	1 EUR = 1.139369	USD	559.43	
Comment							

For the first expected expense or segment in the request, the left navigation arrow will be disabled. For the last expected expense or segment in the request, the right navigation arrow will be disabled.

Section 6: Manage Segment Types

This section outlines how to create, modify, and remove segment types.

Accessing Segment Types

• To access the Segment Types page:

Click **Administration** > **Request** > **Segment Types**. The **Segment Types** page appears.

					Administration -	Help 👻
C. CONCUR Requests	s Travel Expense	Invoice Approvals	Reporting - App Center		Profile 🝷	
Company - Request	Travel Admin Locate 🗸	Expense Invoice				
Request Admin	Segment Ty	pes				
Request Admin Audit Rules Booking Switch Change Log	Find Segment Types where: Segment Type	~	Search			
Company Info	Copy Modify Remove	 	ament Icon	Display order	System record	
Configuration Report	Air Ticket			1	Yes	
Country Groups	Railway Ticket	6		2	Yes	
Delegate Configurations	Car Rental			3	Yes	
Email Reminders	Hotel Reservation			4	Yes	
Exceptions	Taxi Fare			5	Yes	
Feature Hierarchies	Limousine Reservation			6	Yes	
Forms and Fields	Parking Fee	¥		7	Yes	
Image Handling Imaging Settings	Dining			8	Yes	
List Management	Miscellaneous	<u>u</u>		9	Yes	
Localization	Event			10	Yes	
Locations	Air subscription				Vec	
Printed Reports	Insurance				Vac	
Request Groups	Pail subscription				Vac	
Segment Types	Vice	8			Vec	
Site Settings	VISA	Č.)		162	
Test User Admin						
Training Administration						
Travel Agency Offices						
Workflows						

Creating a New Request Segment Type

To create a new segment type, copy an existing one and then make the appropriate edits to the copy.

- To create a new segment type:
 - 1. On the **Segment Types** page, click any segment.

Segment Types	
Find Segment Types where:	
Segment Type	Search
Copy Modify Remove	
Segment I Click here to copy a Segment	Segment Icon
Air Ticket Type	•
Railway Ticket	3
Car Rental	8
Hotel Reservation	e
Taxi Fare	8

2. Click **Copy**. The **New Segment Type** page appears with the <copy of> name.

New Segment Type	
Name: Copy of Segment Type Segment Icon: C Display order: C System record: No	Air Ticket ×

3. In the **Name** field, make the desired changes to the name. You are limited to 35 characters.

NOTE: The text that you enter here becomes the "hover" text for the icon and the segment "section" name.



4. Click an icon.

NOTE: If you click an icon that is already used in a policy (so you are using the same icon twice), only one icon will be displayed to the user. Instead of showing the same icon twice, a single icon appears with an arrow and a dropdown – showing both segments.



- 5. Enter the display order.
- 6. Click Done.

Modifying a Segment Type

The possible modifications are:

- For default segment types: Display order
- For administrator-created segment types: Name, icon, or display order
- To modify a segment type:
 - 1. On the **Segment Types** page, either:
 - Click the desired segment and click Modify.
 or –
 - Double-click the desired segment (anywhere on the line not just the name).

The Modify Segment Type window appears.

- 2. Make the desired changes, as described in *Creating a New Segment Type* in this guide.
- 3. Click Done.

Removing a Segment Type

You can remove an administrator-created segment type only if it has never been used by a traveler. You cannot remove a default segment type, though you can elect to not use it.

- To remove a segment type:
 - 1. On the **Segment Types** page, click the desired segment type.
 - 2. Click Remove.

Segment Types		
Find Segment Types where Segment Type		Search
Copy Modify Re	emove	
Segment Types	Click here to remove a Segment Type con	Display order
Air Ticket	G	1
Railway Ticket	0	2
Car Rental	6	3
Hotel Reservation		4
Taxi Fare	8	5
Limousine Reservation	() ()	6
Parking Fee	2	7
Dining	0	8
Miscellaneous	3	9
Event	3	10
Air subscription	3	
Insurance	8	
Rail subscription	8	
Visa	8	
Helicopter Ticket	G	5

NOTE: The **Remove** button is inactive if the segment cannot be removed.