

Concur Request: Segment Types

Setup Guide

Last Revised: October 1, 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 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	<ul style="list-style-type: none"> • 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" – no other content 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: <ul style="list-style-type: none"> • Update to match current feature set • Updated 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.

The screenshot shows the Concur Request Admin interface. The main content area is titled "Segment Types" and features a search bar with a dropdown menu set to "Segment Type" and a "Search" button. Below the search bar are three buttons: "Copy", "Modify", and "Remove". A table lists the segment types with their respective icons, display orders, and system record status.

Segment Types	Segment Icon	Display order	System record
Air Ticket		1	Yes
Railway Ticket		2	Yes
Car Rental		3	Yes
Hotel Reservation		4	Yes
Taxi Fare		5	Yes
Limousine Reservation		6	Yes
Parking Fee		7	Yes
Dining		8	Yes
Miscellaneous		9	Yes
Event		10	Yes
Air subscription			Yes
Insurance			Yes
Rail subscription			Yes
Visa			Yes

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.

Section 5: End-User Experience

Manage Requests Process Requests Purchase Requests

Trip to Paris \$0.00 Copy Request Submit Request

Not Submitted | Request ID: 333V

Request Details Print/Share Attachments

EXPECTED EXPENSES

Add Edit Allocate Delete

Search for an expense type

- ^ 02. Transportation
 - 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

Cancel Save

Round Trip One Way Multi City

Outbound

From * Seattle Tacoma Intl (Airport - SEA), Seattle, Washington To * Charles De Gaulle Intl (Airport - CDG), Paris, FRANCE

Date * 10/14/2019 Depart at * 07:00 AM

Comment

Return

Date * 10/18/2019 Depart at * 09:00 AM

Comment

Amount * 629.50 Currency * 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.

The screenshot shows a web interface for managing a request. At the top, there are navigation tabs: 'Manage Requests', 'Process Requests', and 'Purchase Requests'. The main header displays 'Trip to Paris \$629.50' with a trash icon, 'Not Submitted | Request ID: 333V', and buttons for 'Copy Request' and 'Submit Request'. Below this are links for 'Request Details', 'Print/Share', and 'Attachments'. The section is titled 'EXPECTED EXPENSES' and includes buttons for 'Add', 'Edit', 'Allocate', and 'Delete'. A table lists the expenses:

<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Air Ticket	Seattle (SEA) - Paris (CDG), Round Trip	10/14/2019	\$629.50	\$629.50

Estimated Total: \$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.

Section 5: End-User Experience

Manage Requests Process Requests Purchase Requests ▾

← → Room Rate EUR 491.00 🗑️
10/13/2019

Cancel Save

🔗 Allocate

Transaction Date *
10/13/2019 📅

Description
Hotel room rate is 98 euros per night for 5 nights

Transaction Amount *
491.00

Currency *
Euro ▾

Conversion Rate Reverse
1 EUR = 1.139369 USD

Amount in 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.

The screenshot shows the Concur web interface. The top navigation bar includes 'Administration' and 'Help'. The main navigation bar includes 'Request', 'Travel Admin', 'Locate', 'Expense', and 'Invoice'. The left sidebar contains a list of administrative options, with 'Segment Types' circled in red. The main content area is titled 'Segment Types' and features a search bar and a table of segment types.

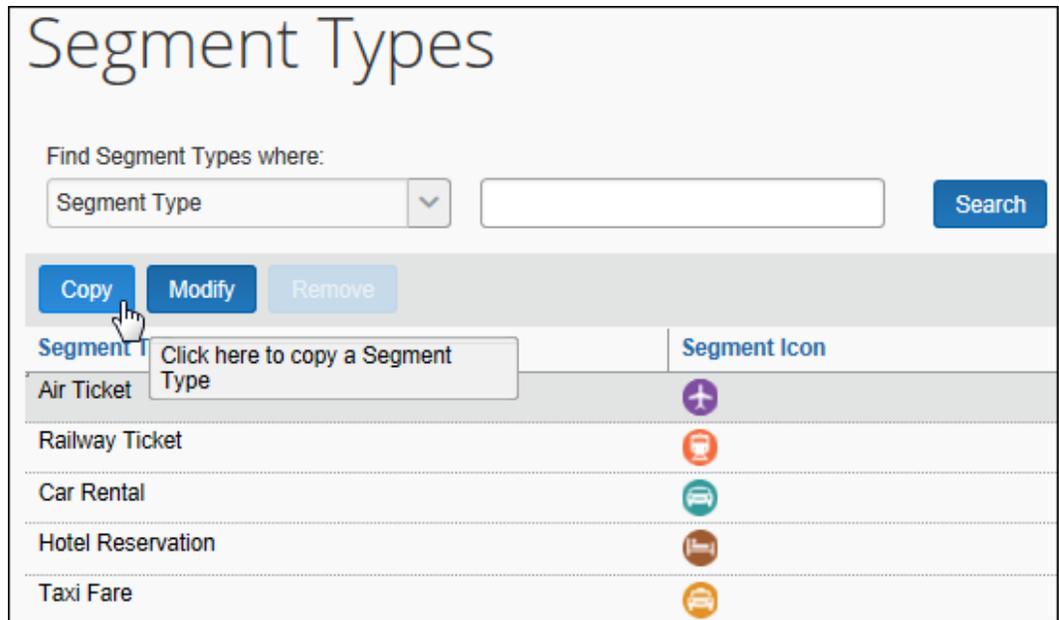
Segment Types	Segment Icon	Display order	System record
Air Ticket		1	Yes
Railway Ticket		2	Yes
Car Rental		3	Yes
Hotel Reservation		4	Yes
Taxi Fare		5	Yes
Limousine Reservation		6	Yes
Parking Fee		7	Yes
Dining		8	Yes
Miscellaneous		9	Yes
Event		10	Yes
Air subscription			Yes
Insurance			Yes
Rail subscription			Yes
Visa			Yes

Creating a New Request Segment Type

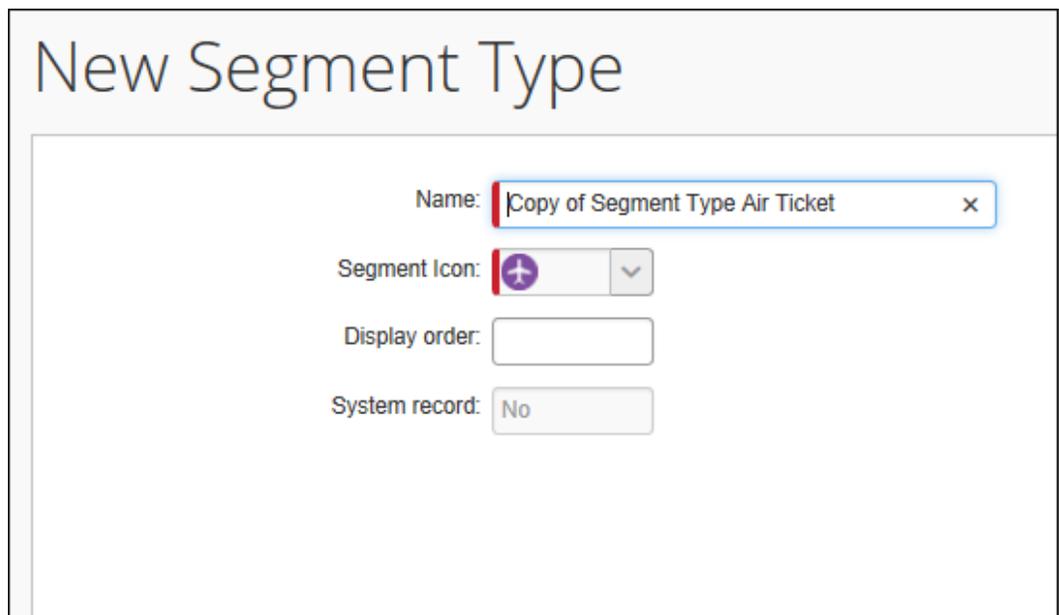
To create a new segment type, copy an existing one and then make the appropriate edits to the copy.

▶ **To create a new segment type:**

1. On the **Segment Types** page, click any segment.

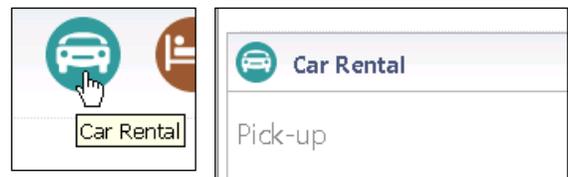


2. Click **Copy**. The **New Segment Type** page appears with the <copy of> name.



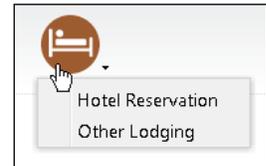
3. In the **Name** field, make the desired changes to the name. You are limited to 35 characters.

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**.

Section 6: Manage Segment Types

Segment Types

Find Segment Types where:

Segment Type

[Click here to remove a Segment Type](#) [Display order](#)

Segment Types		Display order
Air Ticket		1
Railway Ticket		2
Car Rental		3
Hotel Reservation		4
Taxi Fare		5
Limousine Reservation		6
Parking Fee		7
Dining		8
Miscellaneous		9
Event		10
Air subscription		
Insurance		
Rail subscription		
Visa		
Helicopter Ticket		5

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