

# Updating Your Profile Settings

**Overview:** Prior to using Concur, review and update your profile settings. From profile settings, you can update information such as personal information, contact information, emergency contacts, credit cards, add delegates, add favorite attendees, set up travel preferences, add a travel arranger/assistant, and complete the SAP Concur mobile app registration.

**NOTE:** Delegates cannot submit the **Missing Receipt Affidavit** form.

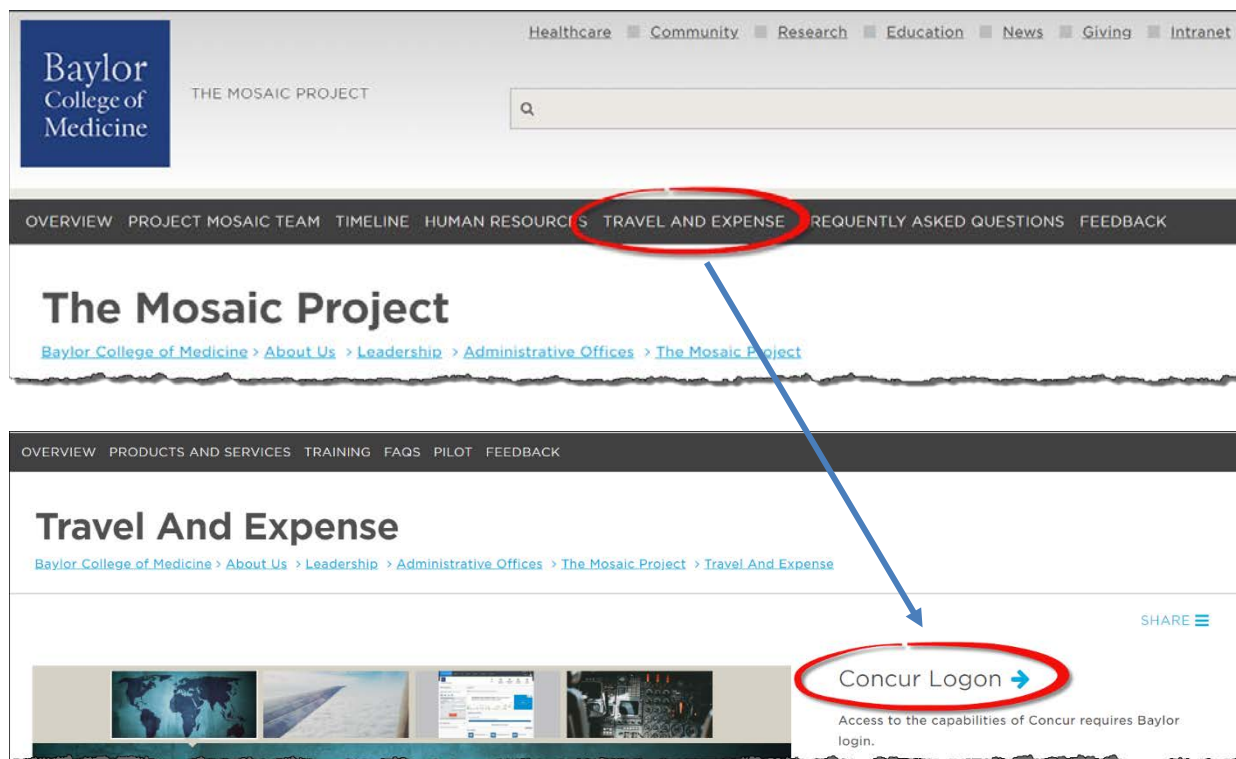
## Log In to SAP Concur

Note

*Depending on which web browser you use, there will be some slight system differences and functionality. The preferred web browsers are **Internet Explorer** and **Chrome**.*

1. Login to [www.bcm.edu/concur-solutions](http://www.bcm.edu/concur-solutions) or click **Concur Logon** from the Travel and Expense website ([www.bcm.edu/mosaic](http://www.bcm.edu/mosaic) > **Travel and Expense**).

Policies, FAQs and training will be available from the **Travel and Expense** web page.



2. SAP Concur uses **Single Sign-On (SSO)**, if prompted, log in with your BCM account.

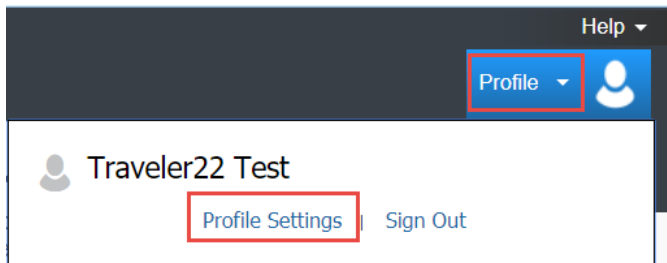


### Quick Reference Guide

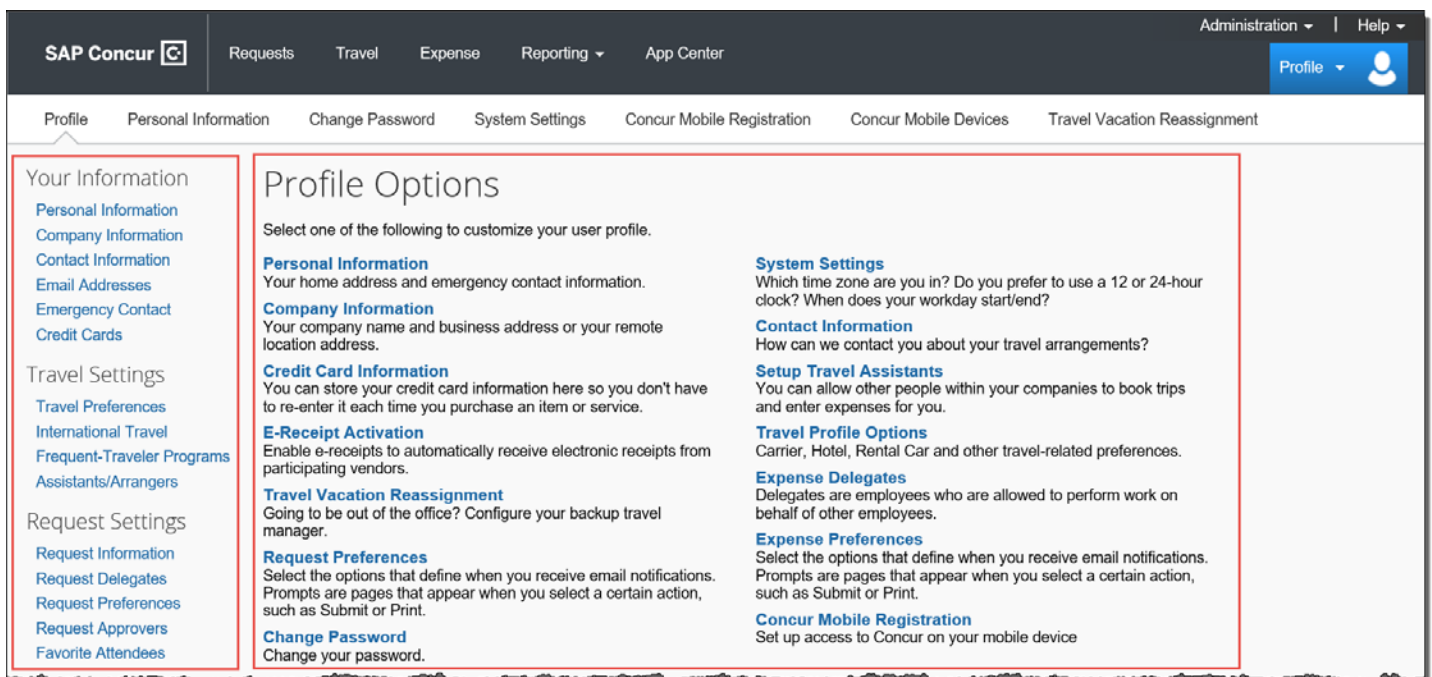
- Version: 18-09-05-01
- Website: [www.bcm.edu/mosaic](http://www.bcm.edu/mosaic)
- SAP Concur Support: [concursupport@bcm.edu](mailto:concursupport@bcm.edu) | IT Help Desk: 713-798-8737

## Accessing Profile Settings

1. To access your Travel profile, from the Concur home page, click **Profile**, and then click **Profile Settings**.



2. You will find the most common profile tasks on the **Profile Options** page. You can also use the menus on the left to select a setting to update.



3. Use the following sections to start updating your Travel profile:

- **Your Information** - Review and update your personal information, contact information, and emergency contacts. Verify your Email addresses, and add or update credit cards that are available to use for purchases.
- **Travel Settings** - Add your travel preferences and frequent-traveler program information. Add travel assistants/arrangers that can book travel for you.
- **Other Settings** - Activate E-receipts, configure system settings, and register your mobile devices.



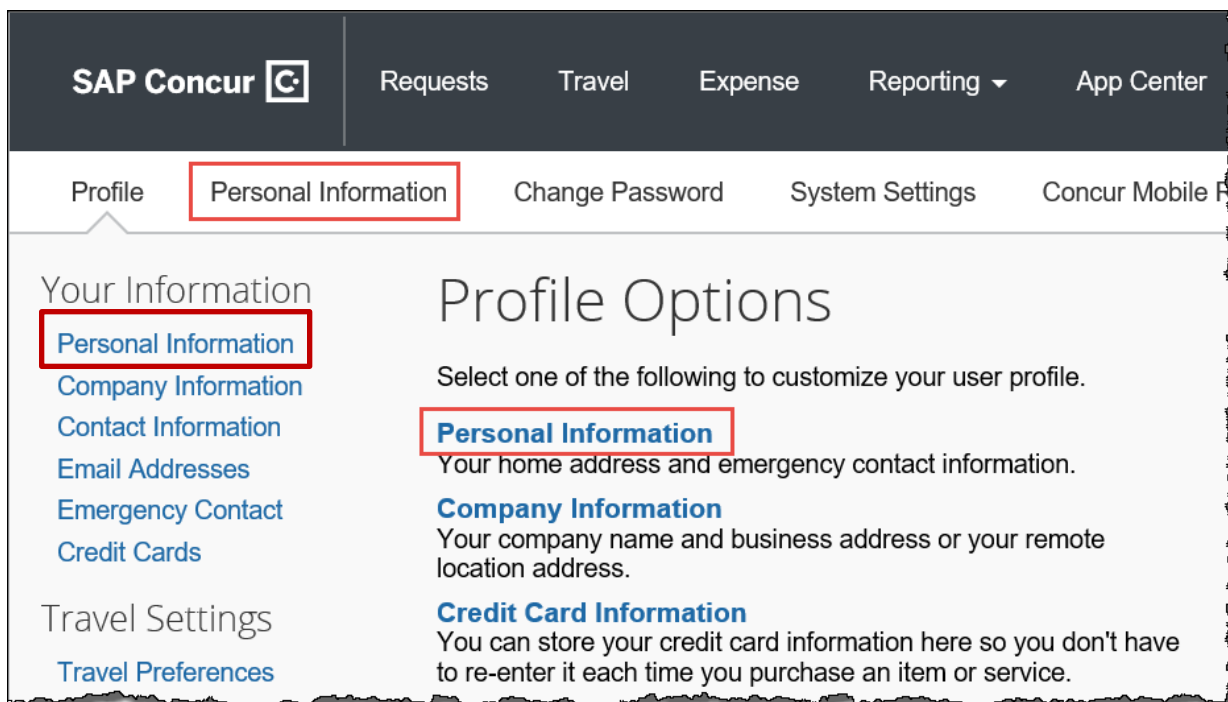
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## Verifying Personal Information

In this example, you will verify your personal information and then travel preferences.

1. Click **Personal Information**.

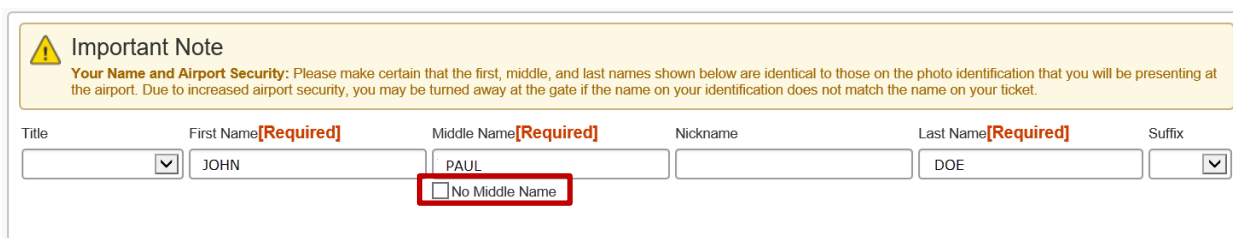


2. In the **My Profile – Personal Information** section, make sure that the first, middle, and last names shown are identical to those on the photo identification that you will be presenting at the airport. If it is incorrect, contact [concursupport@bcm.edu](mailto:concursupport@bcm.edu).



Note

*If you do not have a middle name, select the **No Middle Name** checkbox.*



3. Scroll down and verify your **Work** and **Home Address**, and your **Contact Information** (required fields are labeled in red).



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Go to top

Work Address

Company Name

Baylor

Assigned Location

Please choose a company location.

Street

☐ Address same as assigned location

City

State/Province/Region

Postal Code

Country

Save

Go to top

Home Address

Street

City

State/Province/Region

Postal Code

Country

United States of America

Go to top

Contact Information

Work Phone[Required\*\*]

Work Extension

Work Fax

2nd Work Phone/Remote Office


Home Phone[Required\*\*]

Pager

Other Phone

Concur Mobile Devices

Register and manage your mobile devices here.



Add a new device »

\*\*You must specify either a home phone or a work phone.

Save

- In the **Email Addresses** section, verify your email address. Click **Add an email address** to add any additional email addresses that you will need to use.

Go to top

Email Addresses

Please add at least one email address.

[How do I add an email address?](#)


[Travel Arrangers / Delegates](#)

[Why should I verify my email address?](#)

[How do I verify my email address?](#)

+

Add an email address

Email Address	Verify	Contact?	Actions
Email 1 jsmith@bcm.edu	<input checked="" type="checkbox"/> Not Verified <a href="#">Verify</a>	Yes	

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5. Complete the **Emergency Contact** fields, as needed.

The screenshot shows the 'Emergency Contact' form in SAP Concur. The form has a dark header bar with the title 'Emergency Contact' and a 'Go to top' link. The form fields are organized as follows: 'Name' and 'Relationship' (dropdown) are at the top. Below them is the 'Street' field, followed by a checkbox labeled 'Address same as employee'. The next row contains 'City', 'State/Province/Region', and 'Postal Code' fields. The bottom row contains 'Country' (with 'United States of America' selected), 'Phone', and 'Alternate Phone' fields. A blue 'Save' button is located at the bottom right of the form.

## Updating Travel Preferences

6. Continue scrolling down to the **Travel Preferences** section. Select your discount travel rates/fare classes, and specify your **Air**, **Hotel**, and **Car Rental Preferences**. Under **Frequent-Traveler Program**, click **Add a Program** to add your frequent flyer programs.

The screenshot shows the 'Travel Preferences' form in SAP Concur. The form has a dark header bar with the title 'Travel Preferences' and a 'Go to top' link. The form is divided into several sections: 'Eligible for the following discount travel rates/fare classes' with checkboxes for AAA/CAA, Government, Military, and Senior/AARP; 'Air Travel Preferences' with dropdowns for Seat, Seat Section, Special Meals, and Ticket Delivery, and text fields for Preferred Departure Airport, Other Air Travel Preferences, and Medical Alerts; 'Hotel Preferences' with dropdowns for Room Type and Smoking Preference, a checkbox for Foam pillows, a text field for Message to Hotel Vendor, and checkboxes for hotel amenities; 'Accessibility Needs' with a wheelchair icon and checkboxes for Wheelchair access and Blind accessible; and 'Car Rental Preferences' with dropdowns for Car Type, Smoking Preference, and Car Transmission, checkboxes for In-car GPS system and Ski rack, and a text field for Message to Car Rental Vendor.



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#### Frequent-Traveler Programs

Your Frequent Traveler, Driver, and Hotel Guest Programs

[+ Add a Program](#)

No programs defined

#### Advantage Programs

Your Advantage Programs for Travel Discounts

[+ Add a Program](#)

No programs defined

7. In the **TSA Secure Flight** section, verify the required **Gender** and **Date of Birth** fields. Complete the **DHS Redress No.** and **TSA Precheck Known Traveler Number** fields, as needed.

#### TSA Secure Flight

The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA's web site at [WWW.TSA.GOV](http://WWW.TSA.GOV).

**Gender [Required]** **Date of Birth (mm/dd/yyyy) [Required]** **DHS Redress No. ?** **TSA Pre✓ Known Traveler Number ?**  
☐ Male ☐ Female

8. In the **International Travel Passports and Visas** section, add your passport or international visa information.

Adding your information in the section can make international travel a little easier.

#### International Travel: Passports and Visas

[Go to top](#)

Adding your passport information to your profile will allow us to include it in your reservations. Having this information in your reservation can make international travel a little easier.

##### Passports

[+ Add a Passport](#)

☐ I do not have a passport

##### International Visas

[+ Add a Visa](#)

9. In the **Assistants and Travel Arrangers** section, click **Add an Assistant** to assign someone to book travel for you, or to assign them as your primary assistant for travel.

You can search for and select the individual(s) within your organization that you would like to give permission to perform travel functions for you.



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## 1. Click **Request Delegates** or **Expense Delegates**.

The screenshot shows the SAP Concur user interface. At the top, there's a navigation bar with 'SAP Concur' logo and tabs for 'Requests', 'Travel', 'Expense', 'Reporting', and 'App Center'. Below this is a sub-navigation bar with links like 'Profile', 'Personal Information', 'Change Password', etc. The main content area is titled 'Profile Options' and contains several sections: 'Your Information', 'Travel Settings', 'Request Settings', 'System Settings', 'Contact Information', 'Setup Travel Assistants', 'Travel Profile Options', 'Expense Delegates', 'Expense Preferences', and 'Concur Mobile Registration'. The 'Request Delegates' link in the 'Request Settings' section and the 'Expense Delegates' link in the 'Travel Profile Options' section are both highlighted with red rectangular boxes.

## 2. From the **Delegates** tab, click the **Add** button.

## 3. Search by employee name, email address, employee ID or login ID.

## 4. Select their name.

The screenshot shows the 'Expense Delegates' page. At the top, there's a 'Delegates' tab and a 'Delegate For' dropdown. Below these are 'Add', 'Save', and 'Delete' buttons. The 'Add' button is highlighted with a red box. Below the buttons, there's a search bar with the text 'JOHN SMITH' and an 'Add' button. A dropdown menu is open, showing a search result for 'JSMITH@BCM.EDU - JOHN SMITH' with a hand cursor pointing to it. The dropdown also shows 'User ID: 00123456' and 'Login ID: JSMITH@BCM.EDU'. Below the search bar, there's a table with columns for 'ports', 'Can Submit Requests', 'Can View Receipts', and 'Receives Emails'. The table is currently empty, with the text 'No records found.' at the bottom.



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- Specify which tasks you want the delegate to perform on your behalf, and then click the **Save** button. If you are an approver, assign the desired approver access (preview or approve).

Expense Delegates

Delegates Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.  
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails
<input type="checkbox"/>	Smith, John jsmith@bcm.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- If you have been assigned as a delegate for someone, to view your permissions, click the **Delegate For** tab.

Expense Delegates

Delegates Delegate For

Delete

This employee may act as a delegate for the listed employees.  
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<input type="checkbox"/>	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Receives Emails
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## Viewing Your Fund Center Information

Your funds center will be populated in the **Request** screen but the Expense report will need to be completed. You can view your funds center information from the **Request** screen or **Profile Setting** under **Expense Information**. If you are unsure which funds center to use, contact your approver or add a comment to the approver.

Expense Settings

Expense Information

Expense Delegates

Expense Preferences

Expense Approvers

Favorite Attendees

Want to learn more?  
Watch the video



[Updating Your Expense Profile](#)  
[Updating Your Travel Profile](#)



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