

# 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.

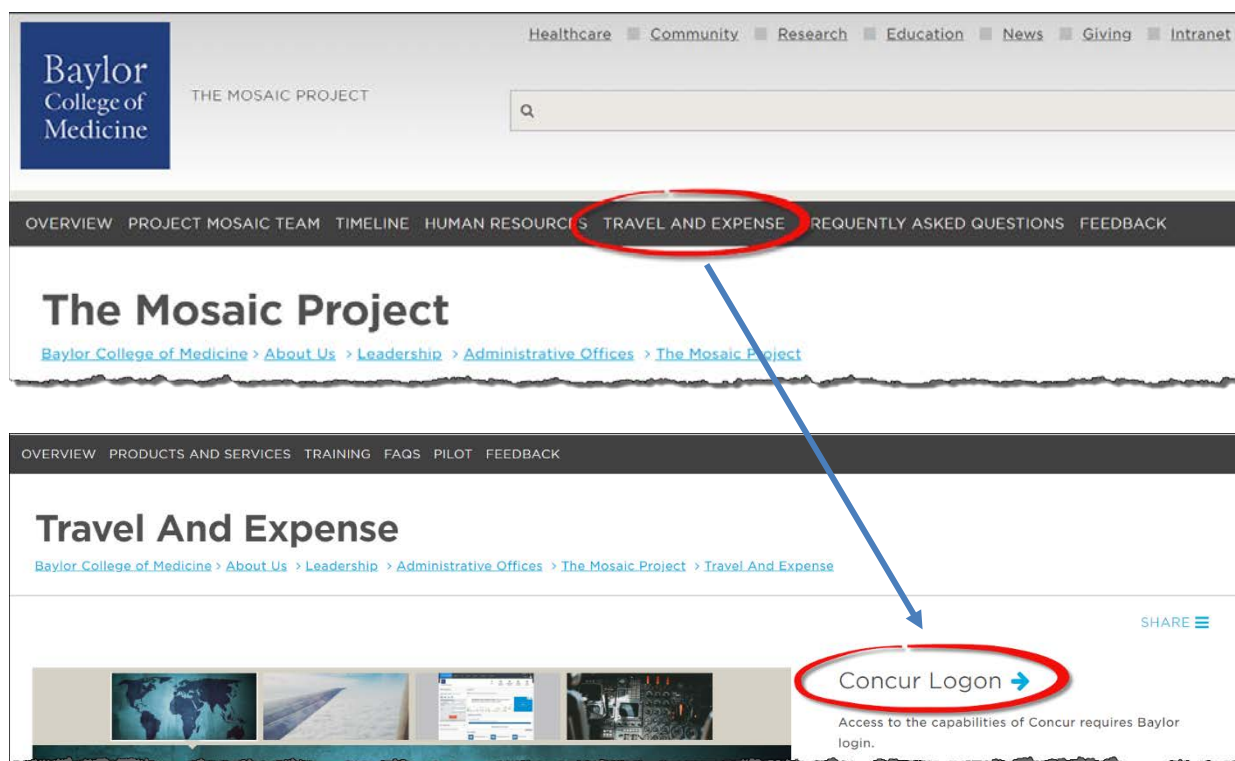
## Log In to SAP Concur

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.

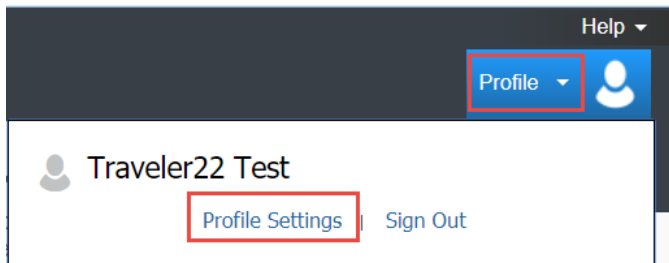


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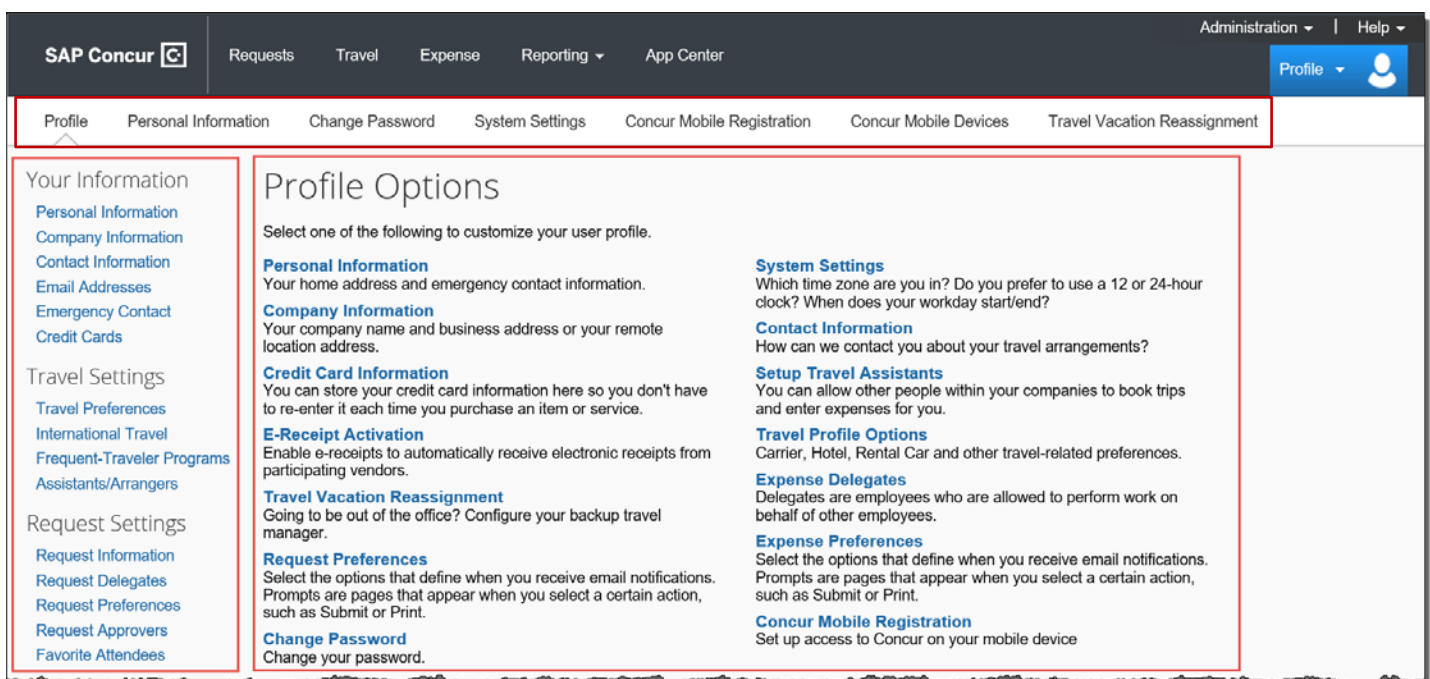
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- Website: [www.bcm.edu/mosaic](http://www.bcm.edu/mosaic)
- SAP Concur Support: [concursupport@bcm.edu](mailto:concursupport@bcm.edu) | IT Help Desk: 713-798-8737

## 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 top or 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.



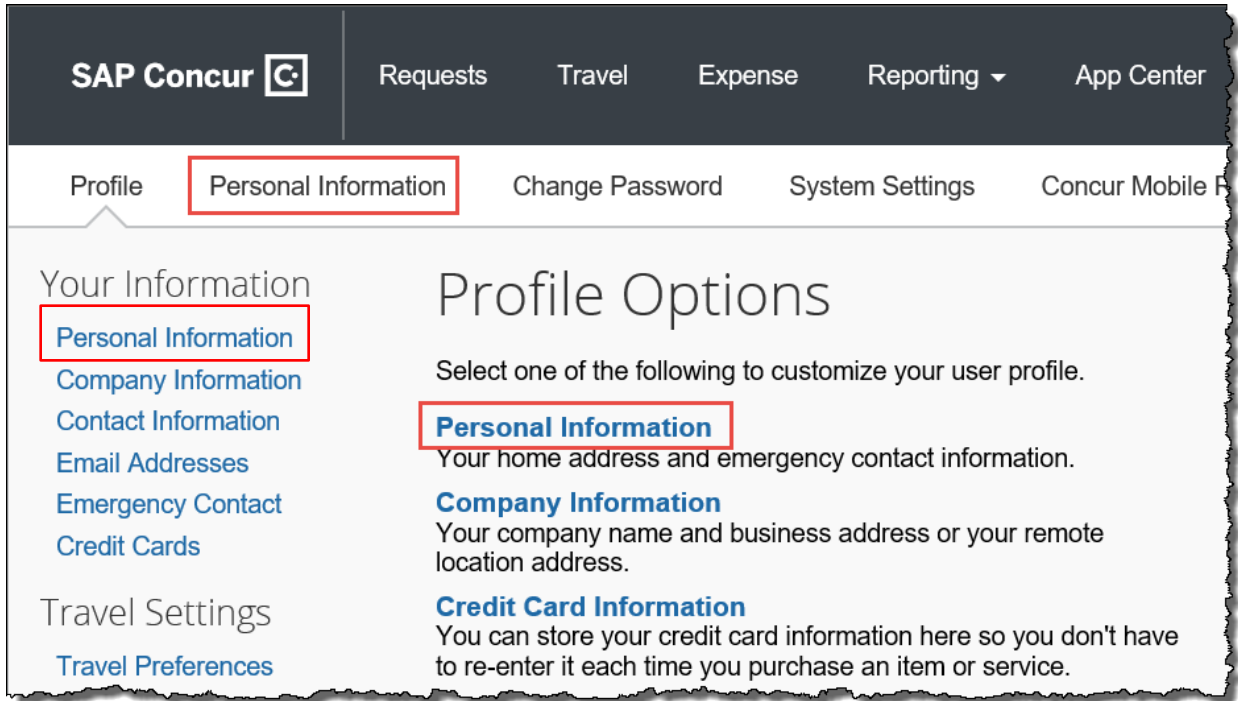
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## Verifying Personal Information

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

1. Click **Personal Information**.



SAP Concur

Requests Travel Expense Reporting App Center

Profile **Personal Information** Change Password System Settings Concur Mobile P

Your Information

**Personal Information**  
Company Information  
Contact Information  
Email Addresses  
Emergency Contact  
Credit Cards

Travel Settings  
Travel Preferences

### Profile Options

Select one of the following to customize your user profile.

**Personal Information**  
Your home address and emergency contact information.

**Company Information**  
Your company name and business address or your remote location address.


**Credit Card Information**  
You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.

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.



Note

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

 **Important Note**  
**Your Name and Airport Security:** Please make certain that the first, middle, and last names shown below are identical to those on the photo identification that you will be presenting at the airport. Due to increased airport security, you may be turned away at the gate if the name on your identification does not match the name on your ticket.

Title	First Name <b>[Required]</b>	Middle Name <b>[Required]</b>	Nickname	Last Name <b>[Required]</b>	Suffix
<input type="text"/>	<input type="text" value="JOHN"/>	<input type="text" value="PAUL"/>	<input type="text"/>	<input type="text" value="DOE"/>	<input type="text"/>
		<input type="checkbox"/> No Middle Name			

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



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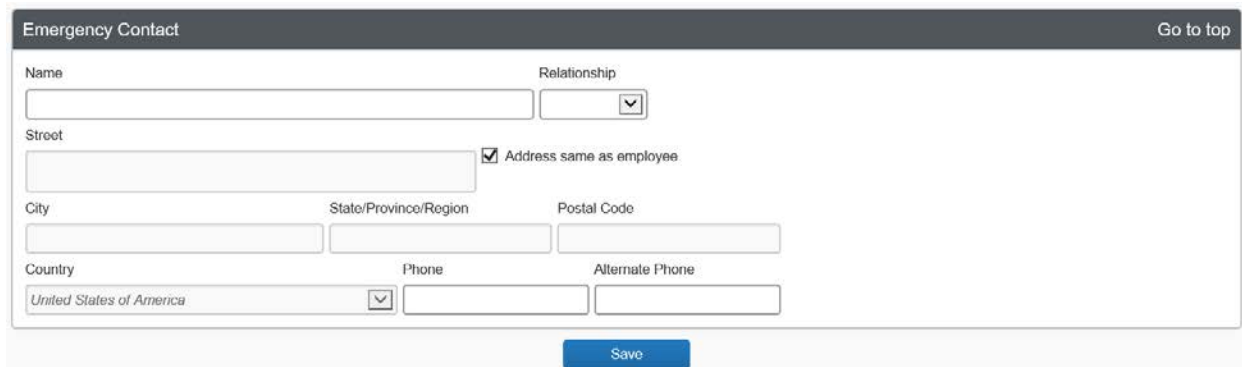
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4. In the **Email Addresses** section, verify your email address. Click **Add an email address** to add any additional email addresses that you will need to use.



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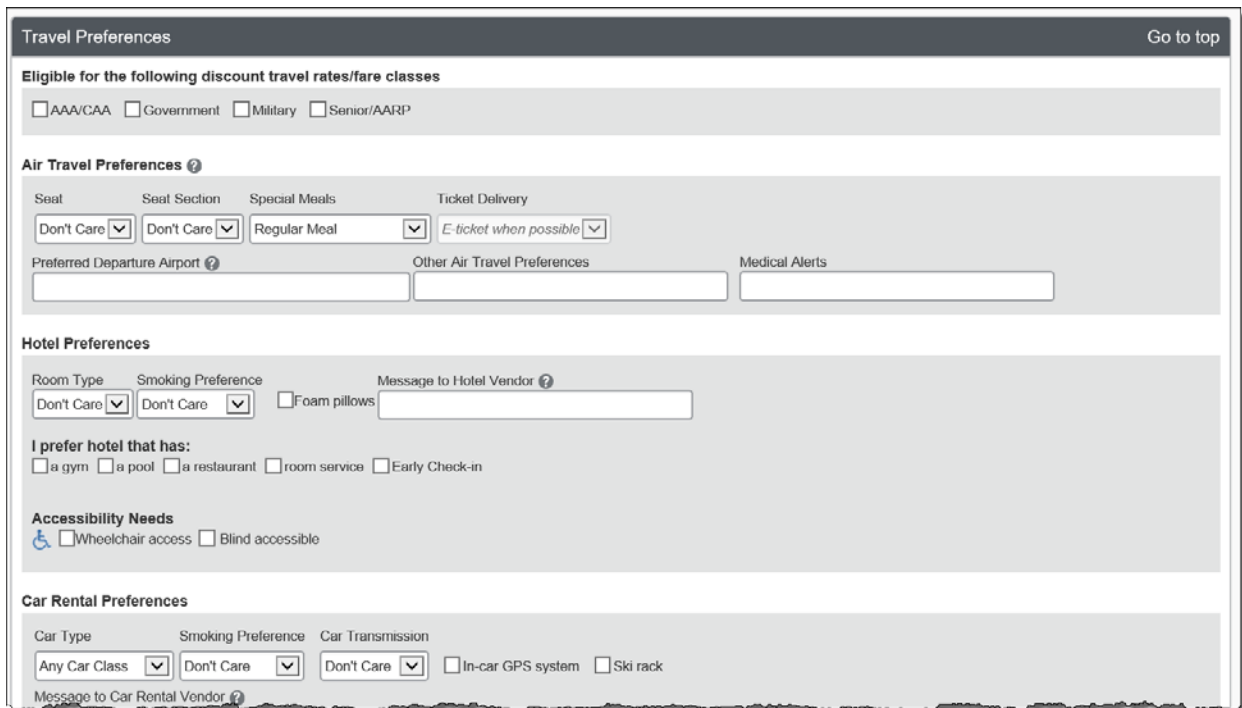
5. Complete the **Emergency Contact** fields, as needed.



The screenshot shows the 'Emergency Contact' form in SAP. It includes fields for Name, Relationship, Street, City, State/Province/Region, Postal Code, Country (pre-filled with 'United States of America'), Phone, and Alternate Phone. There is a checkbox for 'Address same as employee' and a 'Save' button at the bottom.

## 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. It includes sections for 'Eligible for the following discount travel rates/fare classes' (with checkboxes for AAA/CAA, Government, Military, Senior/AARP), 'Air Travel Preferences' (with dropdowns for Seat, Seat Section, Special Meals, Ticket Delivery, Preferred Departure Airport, Other Air Travel Preferences, and Medical Alerts), 'Hotel Preferences' (with dropdowns for Room Type, Smoking Preference, and checkboxes for Foam pillows, I prefer hotel that has: a gym, a pool, a restaurant, room service, Early Check-in, and Accessibility Needs: Wheelchair access, Blind accessible), and 'Car Rental Preferences' (with dropdowns for Car Type, Smoking Preference, Car Transmission, and checkboxes for In-car GPS system, Ski rack, and 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. A text box explains that delegates are employees who can perform work on behalf of others. A search bar prompts the user to search by employee name, email address, employee ID, or login ID. The search input field contains 'JOHN SMITH'. A dropdown menu is open, showing a search result: 'JSMITH@BCM.EDU - JOHN SMITH'. A hand cursor is pointing at this result. Below the dropdown, there's a table with columns for 'ports', 'Can Submit Requests', 'Can View Receipts', and 'Receives Emails'. The table is currently empty, with a message '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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