

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 or click **Concur Logon** from the Travel and Expense website (www.bcm.edu/mosaic > **Travel and Expense**).

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

The screenshot shows the Baylor College of Medicine website. The top navigation bar includes links for Healthcare, Community, Research, Education, News, Giving, and Intranet. Below this is a search bar and a secondary navigation bar with links for OVERVIEW, PROJECT MOSAIC TEAM, TIMELINE, HUMAN RESOURCES, TRAVEL AND EXPENSE (circled in red), FREQUENTLY ASKED QUESTIONS, and FEEDBACK. The main content area displays 'The Mosaic Project' with a breadcrumb trail: Baylor College of Medicine > About Us > Leadership > Administrative Offices > The Mosaic Project. Below this is another navigation bar with links for OVERVIEW, PRODUCTS AND SERVICES, TRAINING, FAQs, PILOT, and FEEDBACK. The 'Travel And Expense' page is shown, with a breadcrumb trail: Baylor College of Medicine > About Us > Leadership > Administrative Offices > The Mosaic Project > Travel And Expense. At the bottom right of the page, the 'Concur Logon' button is circled in red, with a blue arrow pointing to it from the 'TRAVEL AND EXPENSE' link in the top navigation bar. Below the button, it states: 'Access to the capabilities of Concur requires Baylor login.'

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

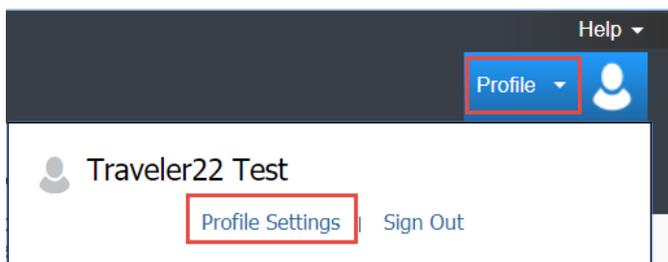


Quick Reference Guide

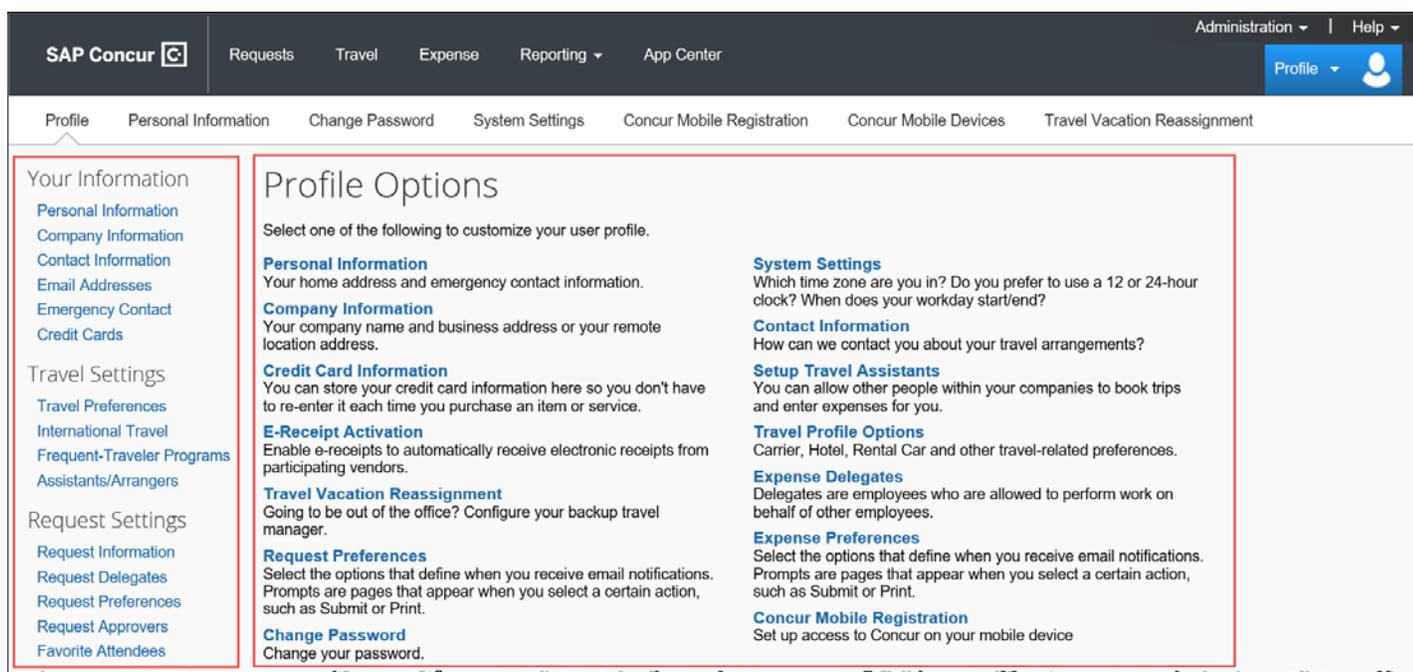
- Version: 18-09-05-01
- Website: www.bcm.edu/mosaic
- SAP Concur Support: concursupport@bcm.edu | IT Help Desk: 713-798-8737

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.



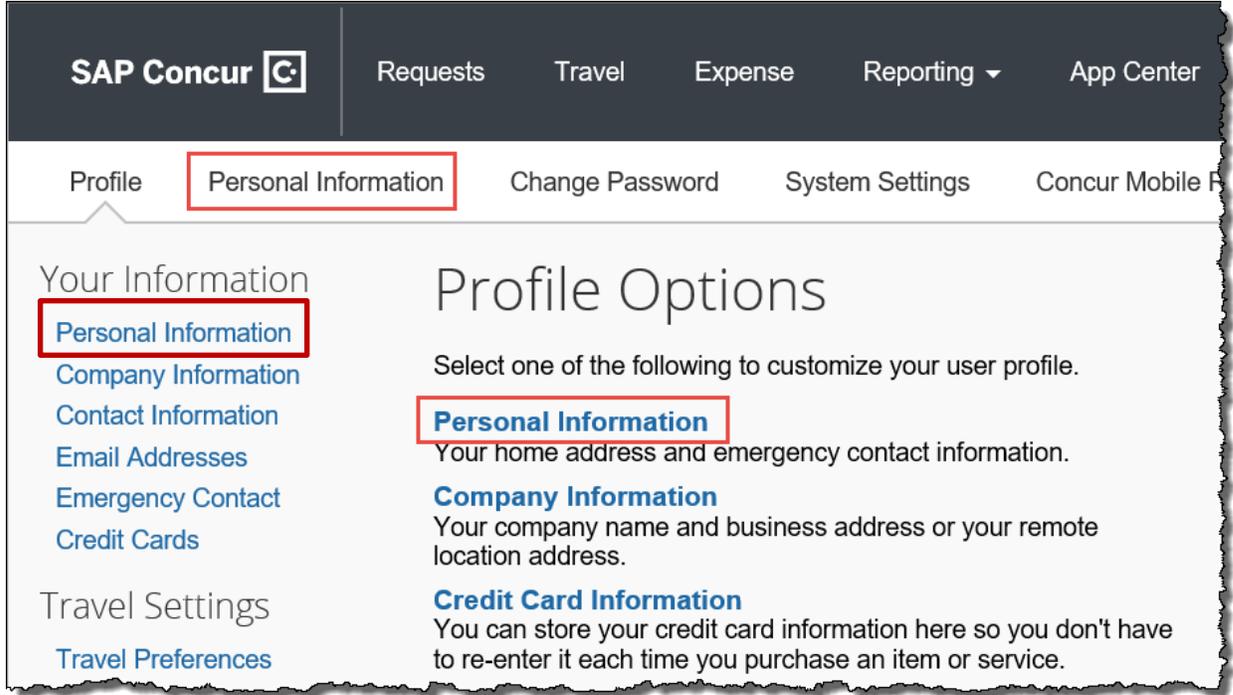
Quick Reference Guide

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

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.



*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 [Required]	Middle Name [Required]	Nickname	Last Name [Required]	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).



Quick Reference Guide

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

Work Address Go to top

Company Name: Assigned Location:

Street: Address same as assigned location

City: State/Province/Region:

Postal Code: Country:

Home Address Go to top

Street:

City: State/Province/Region:

Postal Code: Country:

Contact Information Go to top

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.**

- 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.

Email Addresses Go to top

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?](#)

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



Quick Reference Guide

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

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

The screenshot shows the 'Emergency Contact' form. It has a header with 'Emergency Contact' and a 'Go to top' link. The form contains the following fields:

- Name: Text input field
- Relationship: Dropdown menu
- Street: Text input field with a checked checkbox 'Address same as employee'
- City: Text input field
- State/Province/Region: Text input field
- Postal Code: Text input field
- Country: Dropdown menu (currently showing 'United States of America')
- Phone: Text input field
- Alternate Phone: Text input field

A blue 'Save' button is located at the bottom center 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. It has a header with 'Travel Preferences' and a 'Go to top' link. The form is organized into several sections:

- Eligible for the following discount travel rates/fare classes:** Includes checkboxes for AAA/CAA, Government, Military, and Senior/AARP.
- Air Travel Preferences:** Includes dropdowns for Seat, Seat Section, Special Meals, and Ticket Delivery. It also has text input fields for Preferred Departure Airport, Other Air Travel Preferences, and Medical Alerts.
- Hotel Preferences:** Includes dropdowns for Room Type and Smoking Preference, a checkbox for Foam pillows, and a text input field for Message to Hotel Vendor. It also has checkboxes for 'I prefer hotel that has:' (gym, pool, restaurant, room service, Early Check-in).
- Accessibility Needs:** Includes a wheelchair icon and checkboxes for Wheelchair access and Blind accessible.
- Car Rental Preferences:** Includes dropdowns for Car Type, Smoking Preference, and Car Transmission, and checkboxes for In-car GPS system and Ski rack. It also has a text input field for Message to Car Rental Vendor.



Quick Reference Guide

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

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.

Gender **[Required]** Date of Birth (mm/dd/yyyy) **[Required]** DHS Redress No. ?  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.



Quick Reference Guide

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

Assistants and Travel Arrangers Go to top

Please select the individuals within your organization that you would like to give permission to perform travel functions for you.

Refuse Self Assigning Assistants ?

Your Assistants and Travel Arrangers + Add an Assistant

You currently have no assistants defined.

10. From the **Credit Cards** section, click **Add a Credit Card** to add or update your credit card information that you use to book travel and/or expenses.



Note

Note that you are required to have a credit card saved in your profile before you can book with Concur Travel. You can designate this card as your default for rail tickets, car rentals, and hotel reservations.

Credit Cards Go to top

You currently have the following credit cards saved with your profile.

+ Add a Credit Card

You currently have no credit cards saved.

11. After you have completed your **Travel Profile** updates, click **Save**



Adding Expense Delegates

In this example, you will add a delegate. Delegates are employees who you've assigned to work on your behalf for requests, expenses and/or approval. A delegate will share permissions for requests and expense reports.



Note

Delegates cannot submit the Missing Receipt Affidavit on behalf of the requestor.



Quick Reference Guide

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

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

The screenshot shows the SAP Concur user profile page. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', 'Expense', 'Reporting', and 'App Center'. The user's name and profile icon are in the top right. The main content area is titled 'Profile Options' and contains several sections: 'Personal Information', 'Company Information', 'Credit Card Information', 'E-Receipt Activation', 'Travel Vacation Reassignment', 'Request Preferences', 'Change Password', 'System Settings', 'Contact Information', 'Setup Travel Assistants', 'Travel Profile Options', 'Expense Delegates', 'Expense Preferences', and 'Concur Mobile Registration'. The 'Request Delegates' link in the left sidebar and the 'Expense Delegates' link in the main content area are both highlighted with red 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 are tabs for 'Delegates' and 'Delegate For'. Below the tabs are 'Add', 'Save', and 'Delete' buttons. The 'Add' button is highlighted with a red box. Below the buttons is a search box with the text 'JOHN SMITH' and an 'Add' button. A dropdown menu is open below the search box, showing search results for 'JSMITH@BCM.EDU - JOHN SMITH'. A hand cursor is pointing at the search result. The search results table has columns for 'Name', 'User ID', 'Logon ID', 'Can Submit Requests', 'Can View Receipts', and 'Receives Emails'. The search results show 'JSMITH@BCM.EDU - JOHN SMITH' with 'User ID: 00123456' and 'Logon ID: JSMITH@BCM.EDU'. Below the search results, it says 'No records found.'



Quick Reference Guide

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

- 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"/>				

- 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
--------------------------	------	-------------	--------------------	---------------------	-------------------	-----------------

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](#)



Quick Reference Guide

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