# 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.
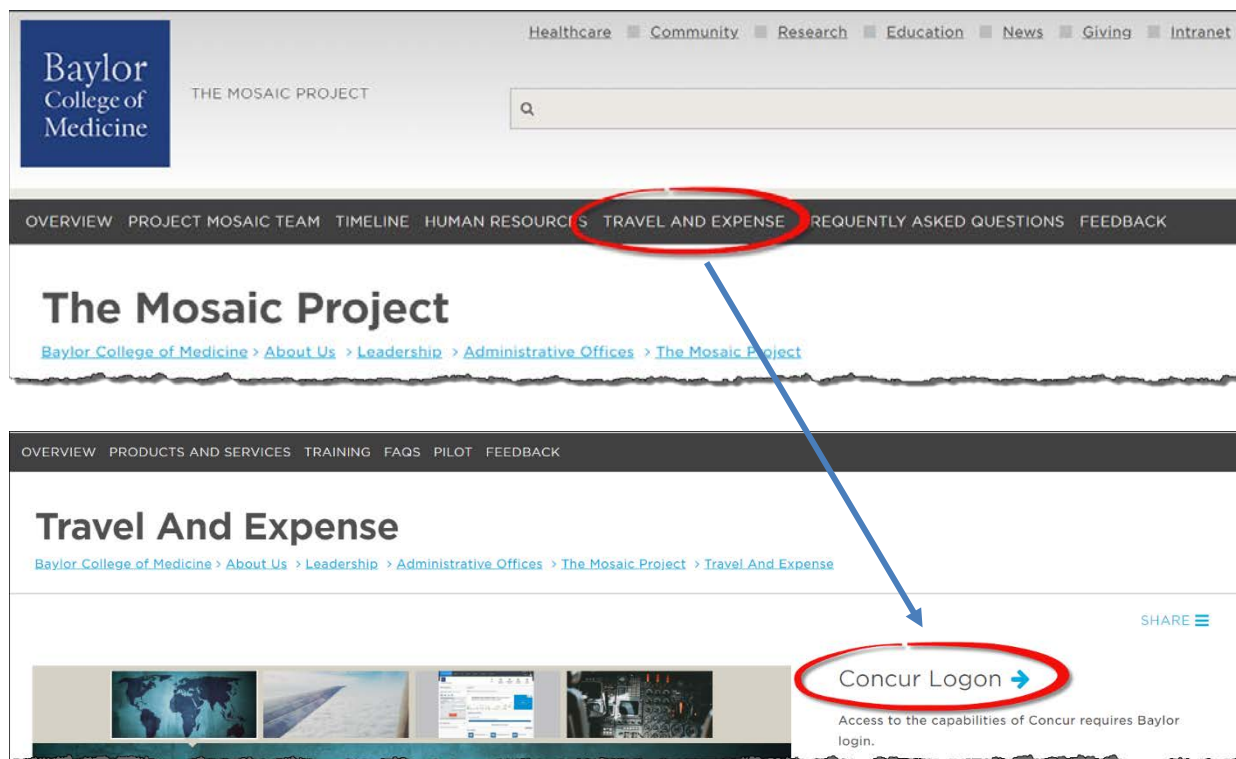


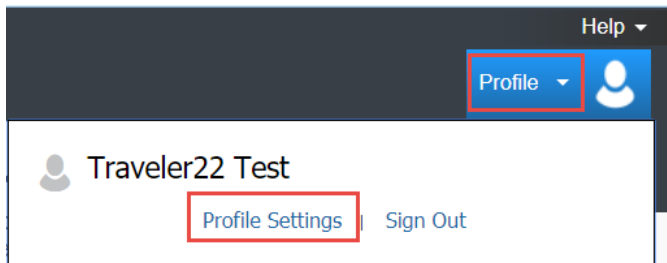2. SAP Concur uses **Single Sign-On (SSO)**, if prompted, log in with your BCM account.
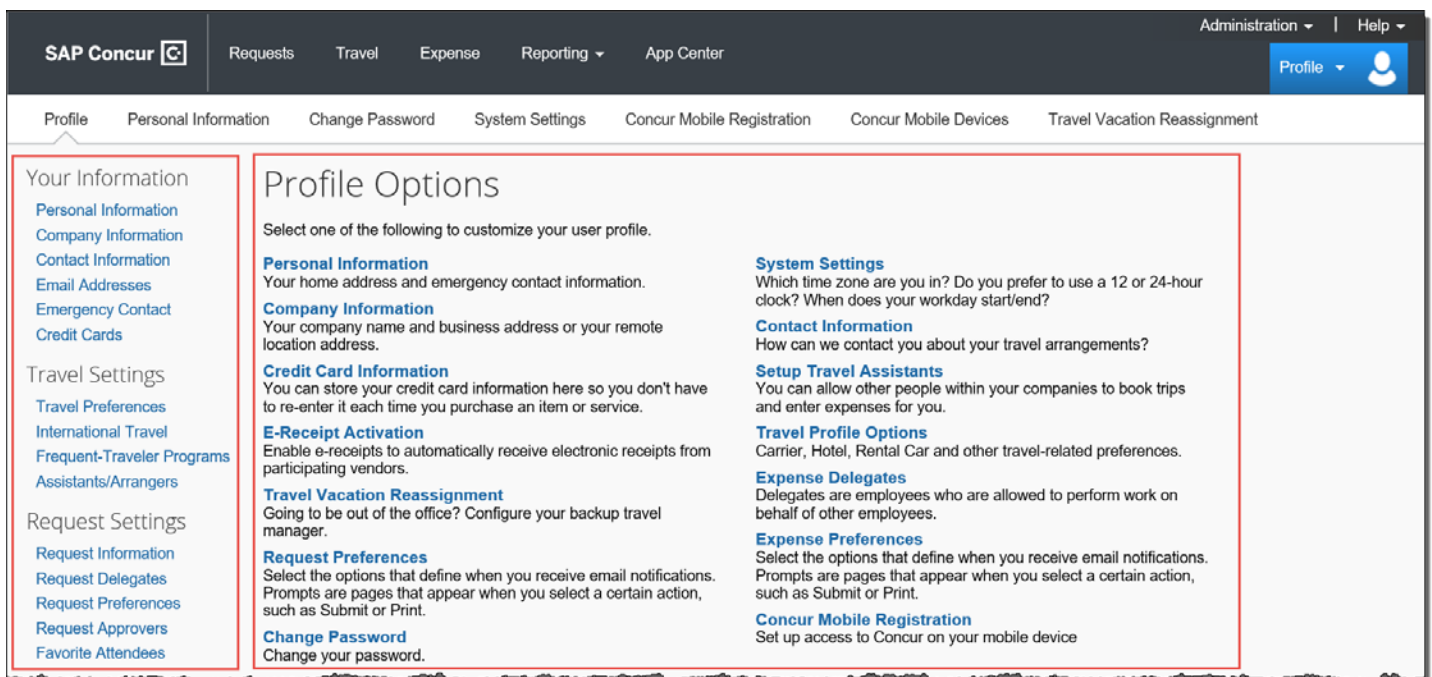
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## Accessing Profile Settings

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.
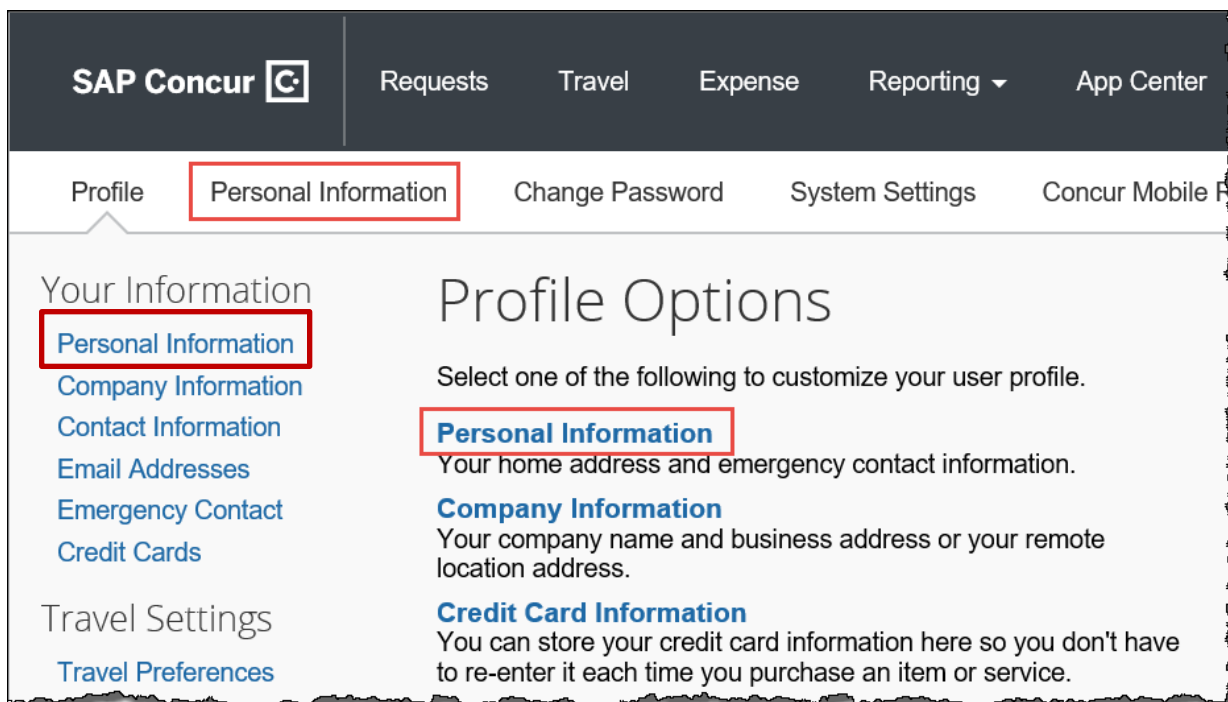
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## Verifying Personal Information

In this example, you will verify your personal information and then travel preferences.
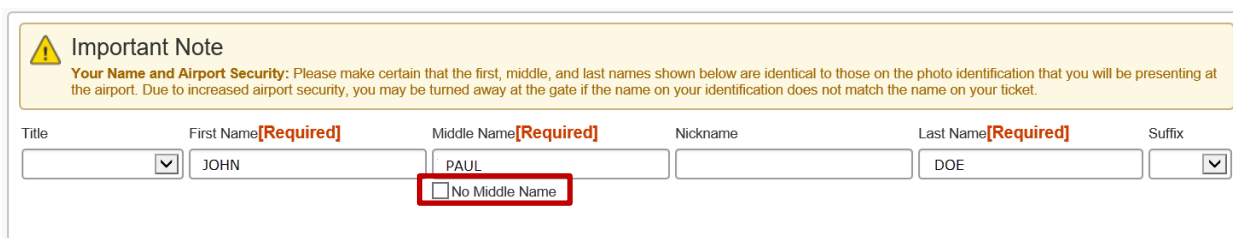
1. Click **Personal Information**.



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.

> **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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## Work Address

| | |
|---|---|
| Company Name | Assigned Location |
| Baylor | Please choose a company location. |

**Street**

☐ Address same as assigned location

| City | State/Province/Region |
|---|---|

| Postal Code | Country |
|---|---|

Save

## Home Address

**Street**

| City | State/Province/Region |
|---|---|

| Postal Code | Country |
|---|---|
| | United States of America |

## 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

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.

## 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 | ✓ Not Verified | Verify | Yes | ✎ |

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



# 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 Preference**s. Under **Frequent-Traveler Program**, click **Add a Program** to add your frequent flyer programs.

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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.

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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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 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.*



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



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

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



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.

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5. 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 desire 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.

| | Name | Can Prepare | Can Submit Reports | Can Submit Requests | Can View Receipts | Receives Emails |
|---|---|---|---|---|---|---|
| ☐ | **Smith, John** jsmith@bcm.edu | ☐ | ☐ | ☐ | ☐ | ☐ |

6. 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.

| | Name | Can Prepare | Can Submit Reports | Can Submit Requests | Can View Receipts | Receives Emails |
|---|---|---|---|---|---|---|

## Viewing Your Fund Center Information

Your funds center will 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 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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