# Concur Profile Settings

Updating your profile is a one-time set up that should be done upon first logging into the system. You can return to your profile to make edits as needed.

| | Update Your Profile |
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| **1.** | At the top of the My Concur homepage, click the **Profile Settings** drop down list. |
| **2.** | Click **Profile Settings**. |
| **3.** | Click **Personal Information**. |
| ⚠️ | **IMPORTANT:** Fields marked **[Required]** <u>must</u> be completed before you can save your profile. You do not need to save after each section. However, you must complete all required fields before you can save the page. Otherwise, you will be prompted to complete required fields. |
| **4.** | ***Verify Your Name For Airport Security:*** <br> Please make certain that the name is identical to the name 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. The Concur Travel Profile name is populated with the employee primary (legal) name as designated in the HR/Payroll System. In order for an employee to update their, they will need to submit a Name Change Form (this can be found on the HR Forms page) and a copy of the social security card with their new name on it. Name Change Forms may be submitted to smuhr@smu.edu or faxed to 214-768-2299. Once HR runs their nightly process, the Concur system will be updated. |
| **5.** | ***Verify Work Address:*** Click the **Assigned Location** drop down list. Select the appropriate campus location. <br> Assigned Location <br> Please choose a company location. ▼ <br> Please choose a company location. <br> *United States of America - NM* <br>    SMU Taos (Ranchos de Taos, NM) <br> *United States of America - TX* <br>    Main Campus (Dallas, TX) <br>    SMU Plano (Plano, TX) |
| **6.** | Check **Address same as assigned location.** (*Optional step*: This is intended for those who have the exact same address as the address listed above.) <br> ☑ Address same as assigned location |
| **7.** | ***Update Contact Information:*** You must specify **either** a home phone or a work phone in this section. |
| **8.** <br> ⚠️ | **Important:**! |

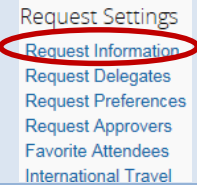|  | **Please register your mobile device for Risk Management purposes.**<br><br>To register a mobile device click **Add a new device.** |
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| **9.** | Enter a **Device Name.** Select the **Device Type** and enter the mobile number. If desired, click **Send Test Message**. The option to **Use for Safety and Business Text Message Alerts** may be selected. Click **OK** once complete.<br><br>Device Name<br>My iPhone<br>Device Type<br>iPhone<br>Mobile Phone Number<br>United States 214-123-4567<br>Send Test Message<br>☑ Primary Mobile Phone<br>☑ Use for Safety and Business Text Message Alerts<br>❓<br>• Message and data rates may apply<br>• Frequency of text messages varies<br>• Terms and Conditions and Privacy policy<br>• In the event you receive a broadcast message on your mobile device you may opt-out by replying STOP, or request more information by replying HELP.<br>OK  Cancel |
| **10.** | *Verify Email address:* Under email address review your email and click **Verify.**<br>lklassen@smu.edu    ✔ Not Verified    Verify    Yes |
| **11.** | A dialog box displays indicating to copy the Verification Code that was sent to you via email. Click OK. |
| **12.** | Paste the code into the Enter Code box and click OK.<br><br>Enter Code [          ]    **OK** |
| **13.** | *Update Emergency Contact Information*: Enter Emergency Contact information as needed. |
| **14.** | *Update Travel Preferences:* Review the Travel Preferences section and update as desired. Please note: You **must** enter your **gender** and **date of birth** under the TSA Secure Flight section. |
| **15.** | *International Travelers:* Update passport and visa information. |
| **16.** | *Assistant and Travel Arrangers*: Assistant and Travel arrangers allow you to designate individuals within your organization that you would like to give permission to make travel arrangements for you. To add an assistant:<br>Click **Add an Assistant.** |
| **17.** | *Update Credit Card Information:* Click **[+] Add a Credit Card** this is the card that will be used for travel booking. |
| **18.** | A new window displays. Enter credit card information and click **Save.** |
| **19.** | Once the profile has been reviewed and all **[Required]** fields have been entered. Click **Save**. Once Concur processes your information you will see save confirmation **Profile Saved**  box display in the right hand corner of the screen. |

## Update Request Settings

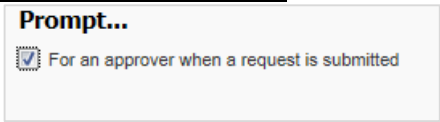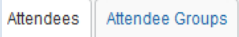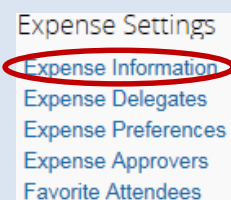| | | |
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| **1.** | Request Settings<br>~~Request Information~~<br>Request Delegates<br>Request Preferences<br>Request Approvers<br>Favorite Attendees<br>International Travel | From the **Profile Page** click **Request Information** located under the Request Settings section. |
| **2.** | | *__Update Request Information:__* Indicate if you have an **SMU Provided Vehicle** or **Auto Allowance**. Click **Save.** |
| **3.** | | *__Request Delegates:__*<br><br>**Important!** Please contact Millicent Grant at 8-2800 prior to setting up a delegate.<br><br>Delegates are employees who are allowed to perform work on behalf of other employees. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.<br><br>To set up a delegate click **Add**. Search by employee name, email address, or SMU ID. Select the desired employee from the drop down list. Next, select the permissions you are granting for them.<br><br>**Note**: A delegate may request travel but may not submit that request for the traveler. Upon filling out the request form the delegate will select **Notify Employee** and the traveler must first approve that request. |
| **4.** | | *__Request Preferences__* – Review the Send email when... section and make changes as needed. Under the **Prompt…**section check **For an approver when a request is submitted**.<br><br>**Prompt...**<br>☑ For an approver when a request is submitted |
| **5.** | | *__Update Favorite Attendees:__* Creating Favorite Attendees makes it easier to add attendees to the Business Meals and Entertainment expense account when you are submitting a report. Click **New Attendee**. Complete the required information. Click **Save**. (You can create additional Favorite Attendees if needed when you are entering the **Business Meals and Entertainment expense.)**<br><br>Attendees   Attendee Groups<br><br>**Attendee Groups** may also be added. Click the **Attendee Groups** tab, select the desired attendees for the group, enter a group name and click **Save Group**. |

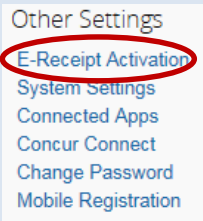| **Update Expense Settings** |
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| **1.**    *__Update Expense Information:__* From the **Profile Page** click **Expense Information** located under the Expense Settings section.<br><br>Expense Settings<br>~~Expense Information~~<br>Expense Delegates<br>Expense Preferences<br>Expense Approvers<br>Favorite Attendees |

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| **2.** | Select **Yes** if you have an **SMU Provided Vehicle** or receive **Auto Allowance.** A default **Fund**, **Org**, and **Division** may be added if desired. This will auto populate when completing a travel request. |
| **3.** | Click **Save.** |
| **4.** | *Update Expense Delegates:*<br>**Important!** Please contact Millicent Grant at 8-2800 prior to setting up a delegate. Delegates are employees who are allowed to perform work on behalf of other employees.<br> By assigning permissions to a delegate, you are assigning permissions for Expense and Request. To set up a delegate click **Add**. Search by employee name, email address, or SMU ID. Select the desired employee from the drop down list. Next, select the permissions you are granting for them. |
| **5.** | *Update Expense Preferences:* Review the **Send email when...** section and make changes as needed. Under the **Prompt…**section check **For an approver when a request is submitted.**<br><br>**Prompt…**<br>☑ For an approver when a request is submitted |
| **6.** | Select the desired option for the **Display…** setting. |
| **7.** | Click **Save.** |

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| **Other Settings: Activate E-Receipts** | |
| **1.** | Other Settings<br>E-Receipt Activation<br>System Settings<br>Connected Apps<br>Concur Connect<br>Change Password<br>Mobile Registration | ***Enabling E-Receipts*** automatically matches your itineraries with expense reports, as applicable, so you can avoid data entry and submitting paper receipts. From the Other Settings section, click the **E-Receipt Activation** link.  A confirmation that e-receipts have been enabled will display. |
| | Once e-receipts are displayed you can forward your receipt images to receipts@concur.com. Receipts that have been uploaded will be in the **Available Receipts** section. Note: Receipts that are forwarded must be in one of the following formats: .png, .jpg, .jpeg, .pdf, .html, .tif or .tiff. 5 MB limit per file.<br><br>⚠ **Important**: The Other Settings section also includes a Change Password link. **Please do not change your password.** |