

Psychology Department Concur Guidelines

Go to : <https://uwaterloo.ca/finance-resources/financial-systems/concur>

Login with your WatIAM id

Security Note

When you log off you must close entire browser. Due to the single sign-on with WatIAM, if you click logoff in Concur, it will take you back to the Concur home page.

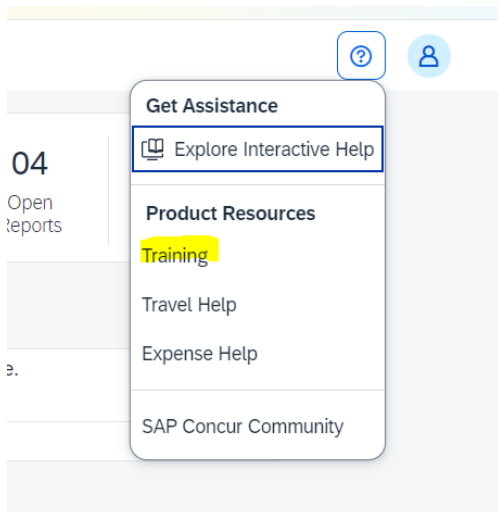
First Time Login Process

1. Verify Profile (Personal Information and email address)
 - a. Review your Personal Information for accuracy and edit as needed
 - b. Add your email address and select *Verify* this will send a test message to your email. Click on the test message received in your email inbox
2. Assign Nick Fuller (nfuller@uwaterloo.ca) and Janice da Silva (j4dasilv@uwaterloo.ca) as Expense Delegates. This allows Nick and/or Janice to assist in the preparation of claims check the tasks:
Can Prepare
Can View Receipts
Select *Save*

Concur User Manual and Training Videos

<https://uwaterloo.atlassian.net/wiki/spaces/FINKB/pages/1327759382/Concur+Online+Expense+System>

You can also access training resources inside concur-



Expense Claim Process

1. Scan receipts accepted file formats: pdf, jpg, png
2. Login to Concur
3. Create a new expense report, but do not change any work-order information
4. Upload receipts, one receipt per expense line
5. When the receipts have been uploaded and claim is ready to be finalized **DO NOT click on 'Submit Report'**
6. Email Nick (nfuller@uwaterloo.ca) and let him know your claim is ready for review
7. Nick will review and resolve any issues as your delegate before the claim is submitted to Concur contact Nick for process and policy/procedure related questions.