

Psychology Department Concur Guidelines

<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.

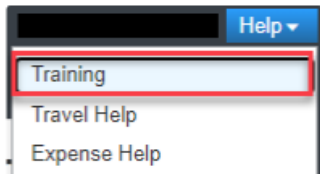
First Time Login Process

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 Katy McEwen (klmcewen@uwaterloo.ca) and Janice da Silva (j4dasilv@uwaterloo.ca) as Expense Delegates. This allows Katy 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 access the Concur training material through the **Help** menu.



Concur training link

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 katy (klmcewen@uwaterloo.ca) and let her know your claim is ready for review
7. Include the name of the faculty supervisor paying for the claim and any other funding info
8. Katy will review and resolve any issues as your delegate before the claim is submitted to Concur

Contact Katy for process and policy/procedure related questions.

Updated October 2022