

Enabling 'Apps for My Business' Solutions from the Concur App Center

Basic Configurations



2 Steps to Enabling Your App for Basic Configurations

Step 1: Create & Transfer Credentials

Note: This step can either be completed by your own authorized Concur Administrator or you can log a ticket with the Concur Helpdesk to have this step completed for you by our support team. It is important that this Web Services Admin User Profile is not the same as any *actual* user of the system. If an actual user's credentials are utilized for this purpose and they leave the company, the applications will no longer function.

How to Create a WS Admin User Profile in Concur Standard Edition:

Click **Administration** and then **Setup**. Select **Users** from the menu on the left and click **Create/Edit User**.

The screenshot shows the Concur Administration Setup page for creating a WS Admin User Profile. The page is titled "Set up Expense for JessicaPankovSandbox". The left sidebar contains a navigation menu with the following items: 1) Introduction, 2) Policy Groups, 3) Cost Tracking, 4) Expense >, 5) Users (highlighted), 6) Reporting Configuration, and 7) Localization. The main content area is titled "User Information" and includes a sub-header "This is where you add users, search for existing users, and update user information." Below this, there are two tabs: "Save" and "Cancel". The "Save" tab is selected. The form contains the following fields:

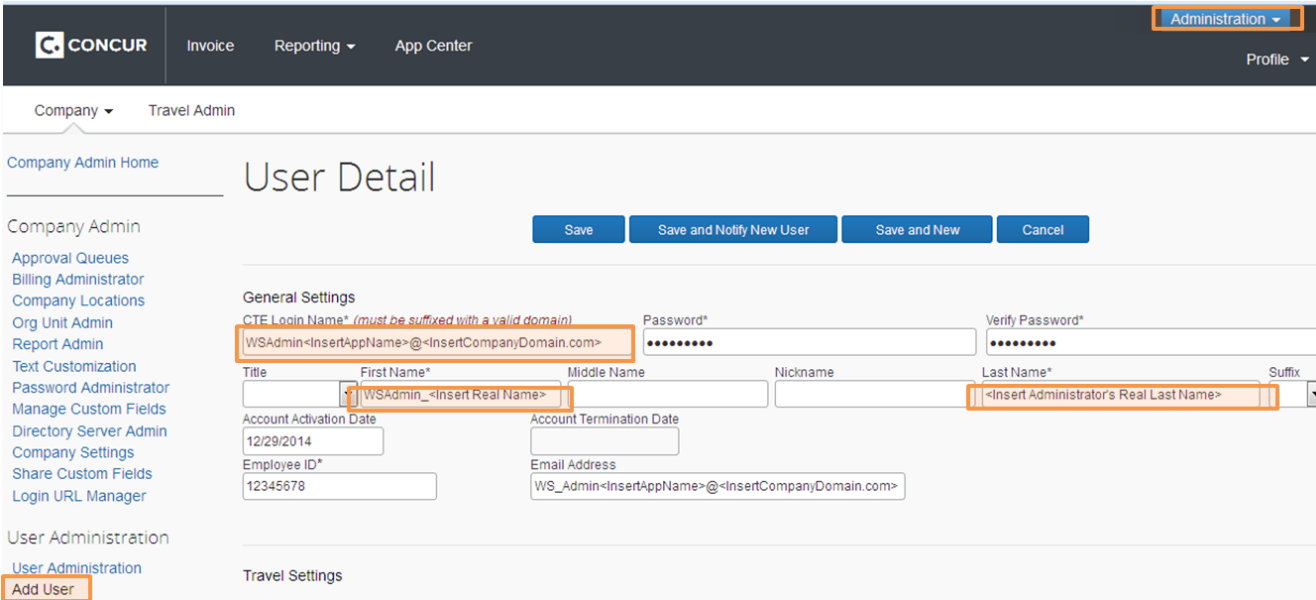
- Login (email address):** WSAdmin_AppName@YourDomain.
- Password:** [Redacted]
- Retype Password:** [Redacted]
- Employee Administration Country:** United States
- Employee First Name:** WSAdmin_ActualAdminName
- Employee Last Name:** Actual Administrators Name
- Middle Name:** [Redacted]
- Employee ID #?** WSAdmin-AppProviderName
- Email Address:** WSAdmin-AppProviderName@
- Country of Residence:** UNITED STATES
- State/Province:** Select one
- Locale:** English (United States)
- Reimbursement Currency:** US, Dollar
- Active:** ☒
- Exempt from Expense Type Limit rules?:** ☐
- Manager:** Select One ..
- Reimbursement Method:** -Please Select-
- User Permissions:** Check all that apply
- Cognos Reporting Access:** Select One ..
- Expense:**
 - ☒ Can Administer
 - ☐ Can Process Expense Reports
 - ☒ Can Submit Expense Reports
 - ☒ Can Approve Expense Reports

The new WS Admin User Profile in Concur Standard Edition should have the following attributes:

- **LoginID:** Include WSAdmin and the name of the application as the login id like this:
WSAdmin-AppProviderName@YourCompanyDomain.com
- **First Name:** To easily identify this user profile later and also indicate who the authorized user was that enabled the application, use a combination of "WSAdmin" and the first name of the actual administrator who is authorizing the application. Example: WSADMIN_John
- **Last Name:** Insert the actual last name of the authorized administrator who will enable the application.
- **Password:** Create a unique and secure password for the user.
- **Permissions:**
 - Select "Can Administer" check box
 - Select "Can Submit Expense Reports", "Can Book Travel" and/or "Is Invoice AP User" check boxes based on what type of data is needed for the application. The system will grant the relevant data access based on the roles that are assigned to this user. For example, if the app needs to access Travel data and the WS Admin User Profile does not have access to travel, the app will not access travel data.
- Click **Save** then securely send the **Login ID and Password** to your app provider.

How to Create a WS Admin User Profile in Concur Professional Edition:

Click into the **Administration** tab & then click into the **Company Admin** menu. Click **Add New User**

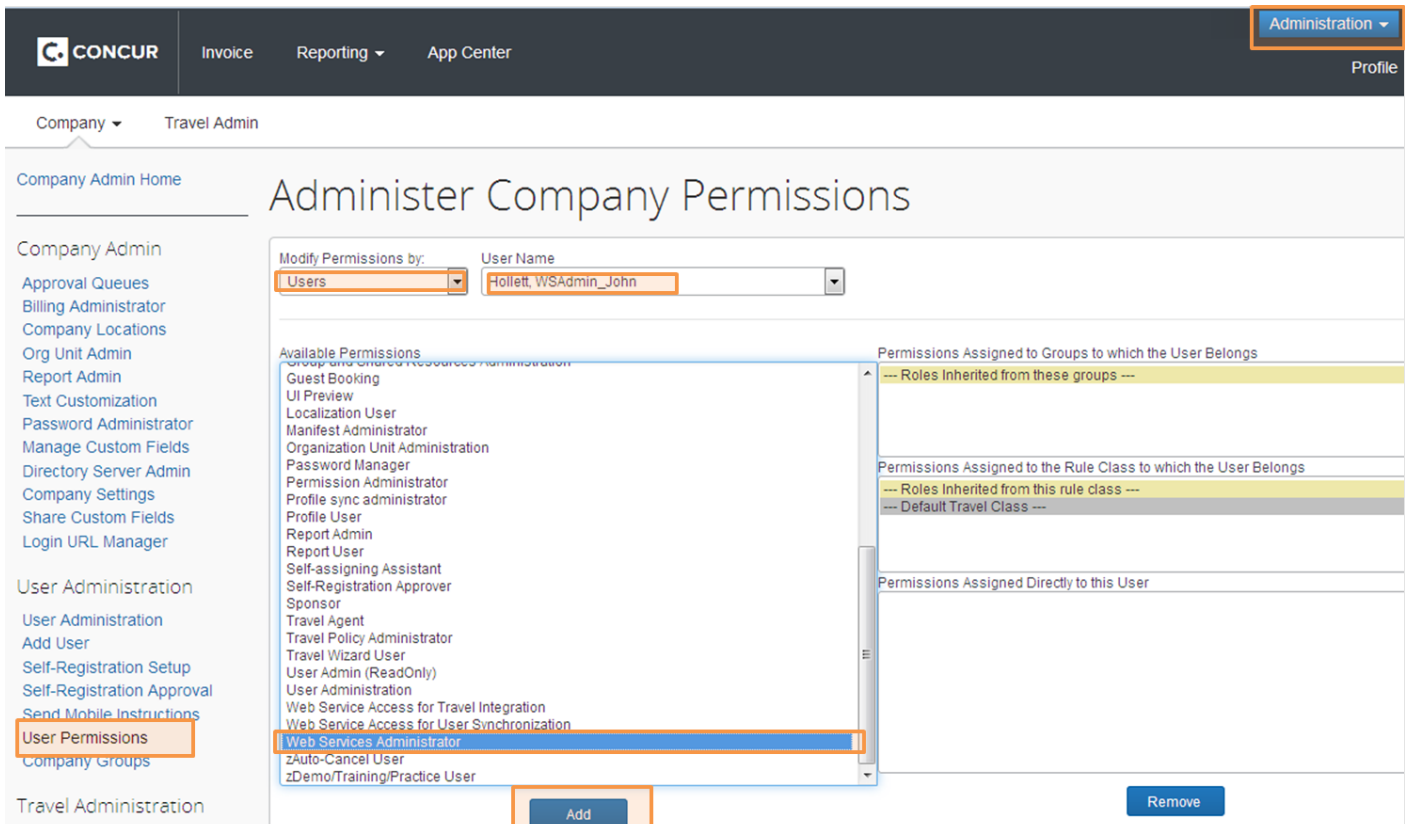


The screenshot shows the Concur user management interface. The top navigation bar includes 'CONCUR', 'Invoice', 'Reporting', 'App Center', and 'Administration' (highlighted). Below this, the 'Company Admin' menu is visible, with 'Add User' highlighted. The main form is titled 'User Detail' and contains the following fields:

- General Settings:**
 - CTE Login Name* (must be suffixed with a valid domain): WSAdmin-InsertAppName@InsertCompanyDomain.com
 - Password*: *****
 - Verify Password*: *****
 - Title: WSAdmin_<Insert Real Name>
 - First Name*: WSAdmin_<Insert Real Name>
 - Middle Name:
 - Nickname:
 - Last Name*: <Insert Administrator's Real Last Name>
 - Suffix:
- Account Information:**
 - Account Activation Date: 12/29/2014
 - Account Termination Date:
 - Employee ID*: 12345678
 - Email Address: WS_Admin-InsertAppName@InsertCompanyDomain.com
- User Administration:**
 - Add User** (highlighted button)

The new WS Admin User Profile in Concur Professional Edition should have the following attributes:

- **LoginID:** Include WSAdmin and the name of the application as the login id like this:
WSAdmin-AppProviderName@YourCompanyDomain.com
- **Password:** Create a unique and secure password for the user.
- **First Name:** To easily identify this user profile later and also indicate who the authorized user was that enabled the application, use a combination of “WSAdmin” and the first name of the actual administrator who is authorizing the application. Example: WSADMIN_John
- **Last Name:** Insert the actual last name of the authorized administrator who will enable the application.
- **Email Address:** use the actual email address of the authorized administrator



The screenshot shows the Concur Administration interface. At the top, the 'Administration' dropdown is highlighted. The 'Company Admin' sidebar on the left has 'User Permissions' highlighted. The main content area is titled 'Administer Company Permissions'. It features a 'Modify Permissions by:' section with a 'Users' dropdown and a 'User Name' field containing 'Hallett, WSAdmin_John'. Below this is a list of 'Available Permissions' with 'Web Services Administrator' highlighted. At the bottom right of the list, the 'Add' button is highlighted. To the right of the list are sections for 'Permissions Assigned to Groups to which the User Belongs', 'Permissions Assigned to the Rule Class to which the User Belongs', and 'Permissions Assigned Directly to this User'.

Next, while still in the **Administration** area, click **User Permissions**

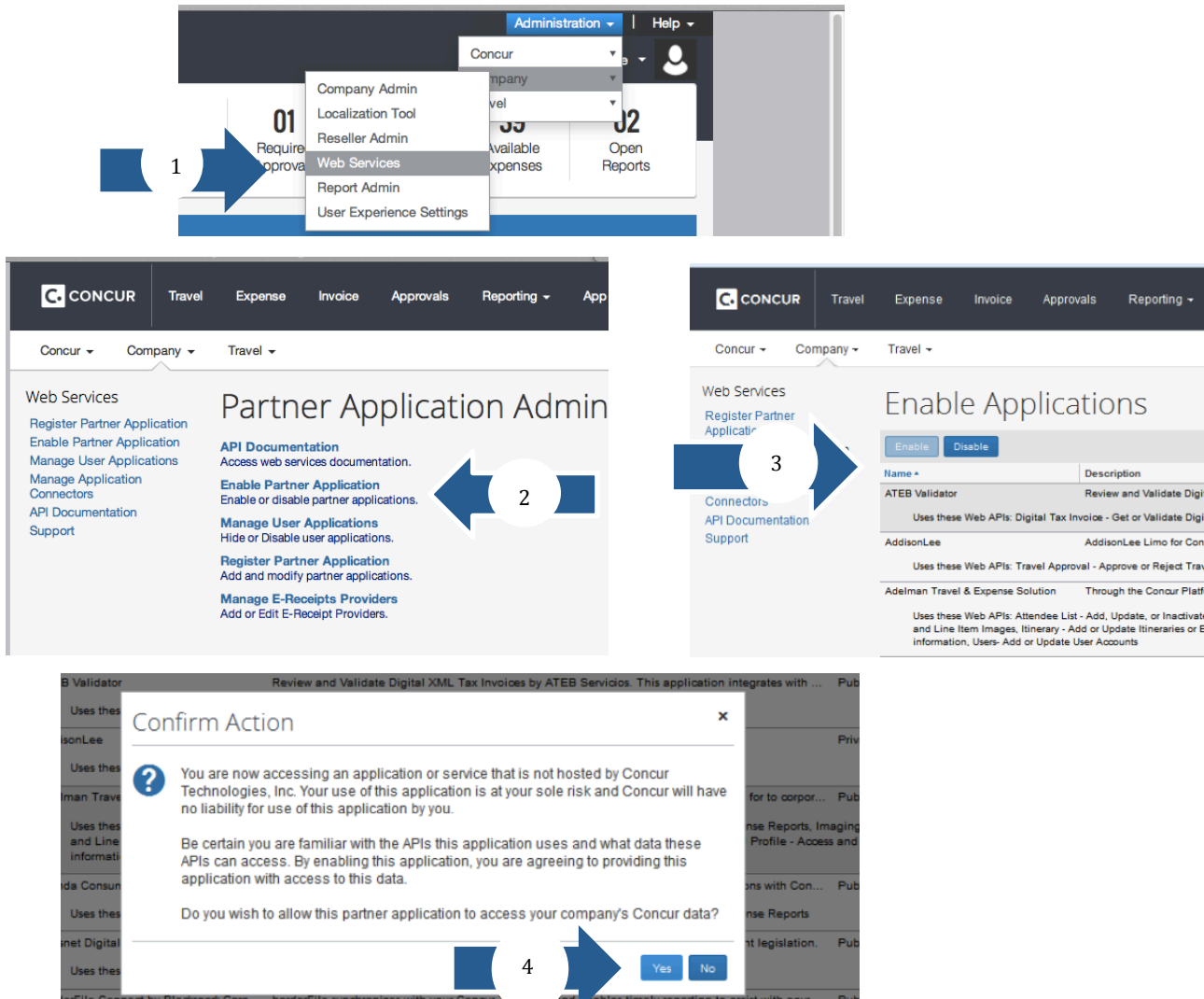
- Find the new WSAdmin User and select **Add** to grant **Web Services Administrator** Permission.
- Ensure the WSAdmin profile also has the Expense User, Travel User, & Invoice User permissions or roles for apps integrating with Expense, Travel, and/or Invoice Services respectively. The system will grant the relevant data access based on the roles that are assigned to this user. For example, if the app needs to access Travel

data and the WS Admin User Profile does not have access to book travel, the app will not be able to access the necessary travel data.

- Once your new user profile has been created, transfer the Login Name and Password securely to the app provider you are working with to create a secure data connection.

Step 2: Enable the App

The Concur administrator who has been named in the newly created WS Admin Profile logs into Concur with the new credentials. Then go to to **Administration > Company > Web Services > Enable Partner Application** and find the app. Finally, click “Enable” and confirm the sharing of data.



Step 1: Navigation menu showing 'Web Services' selected.

Step 2: 'Partner Application Admin' page with 'Enable Partner Application' highlighted.

Step 3: 'Enable Applications' page with a table of applications and an 'Enable' button.

Step 4: 'Confirm Action' dialog box asking for confirmation to allow data access.