C. CONCUR

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

Basic Configurations

Updated 12/29/14

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 <u>not the same as any *actual* user of the system</u>. 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 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**" and then **login to Concur** with these new user credentials once to activate the account.

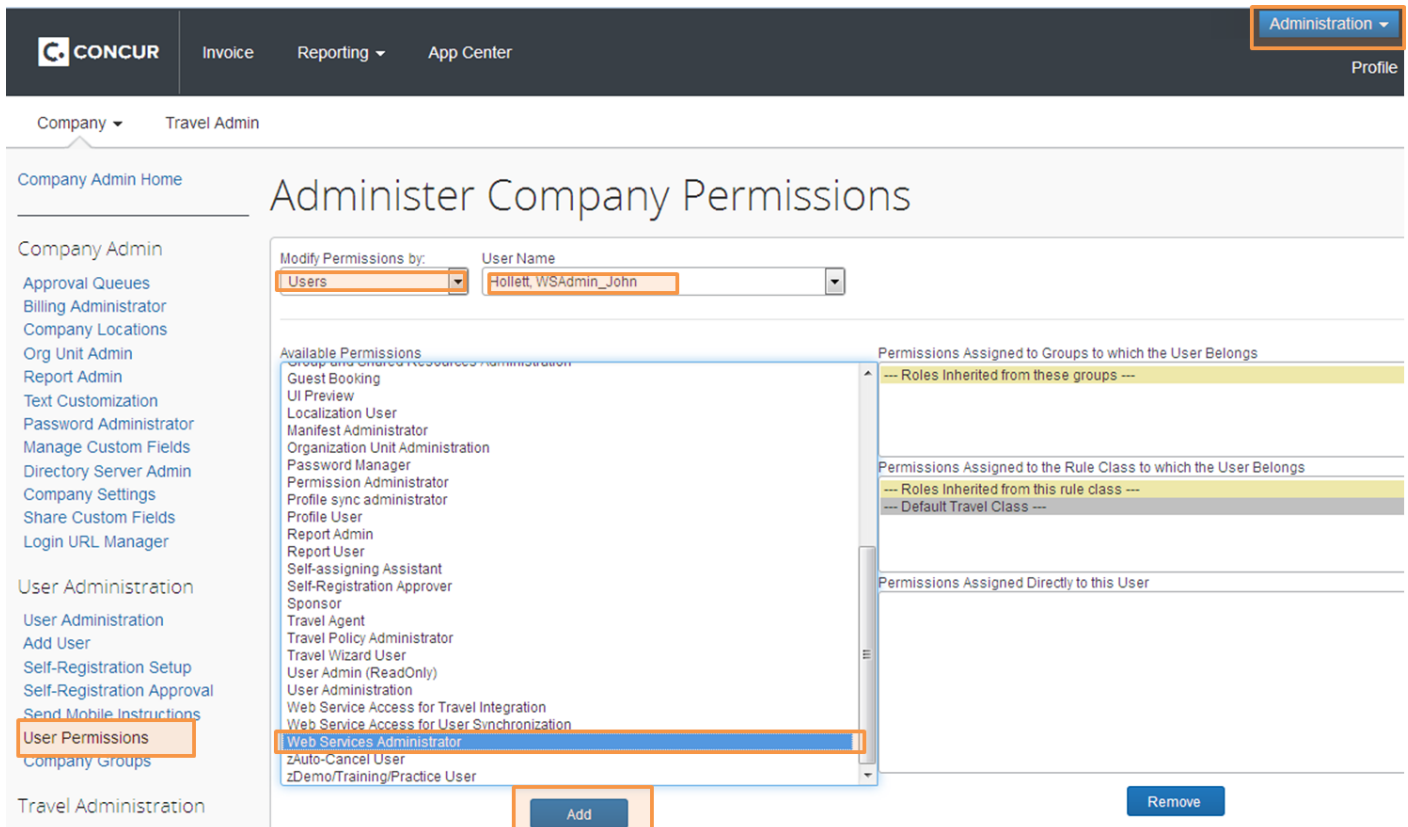- Securely send the **Login ID and Password** to your app provider.

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 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

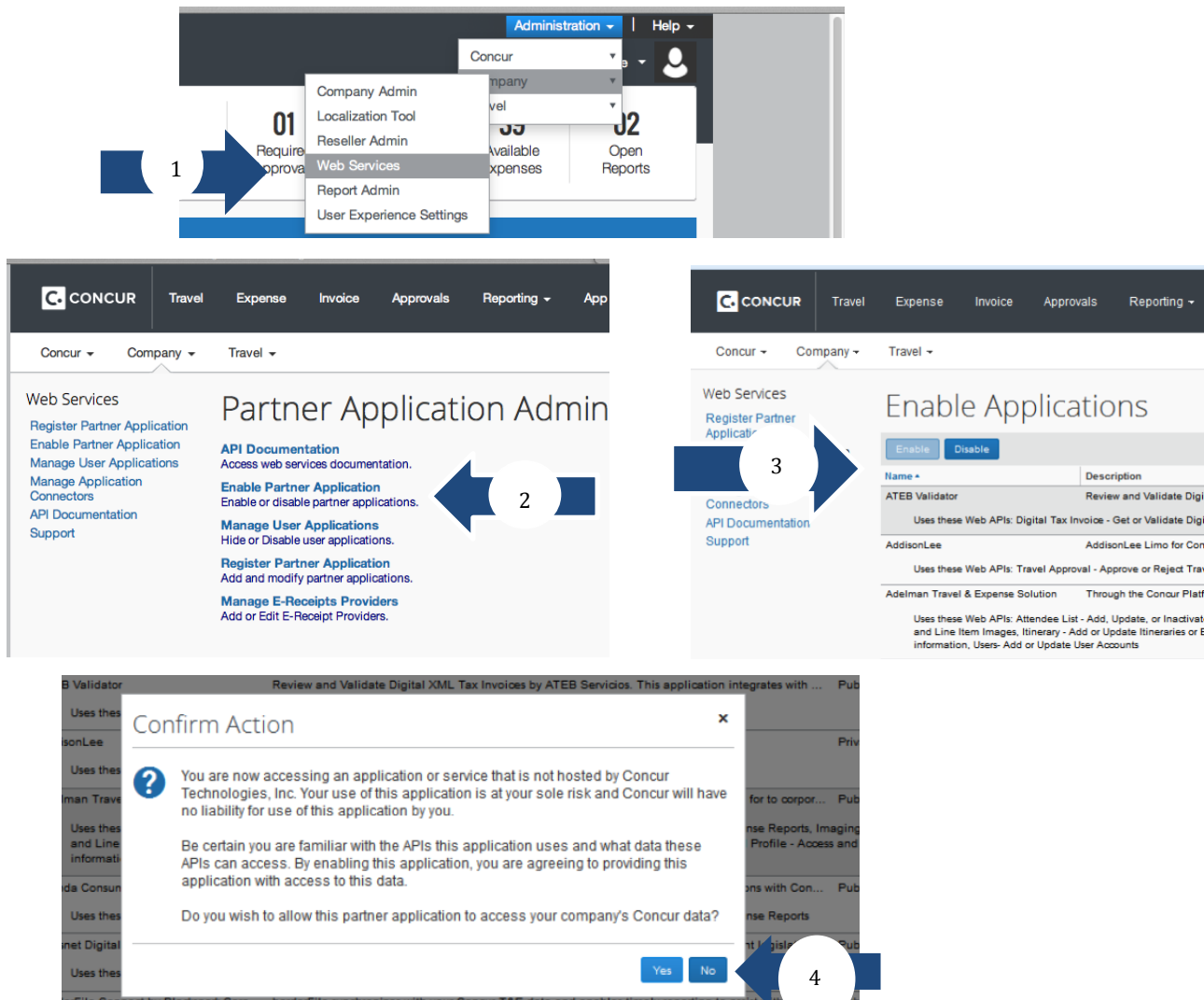Next, while still in the **Administration** area, click **User Permissions**

- 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 you must **login to Concur with these credentials** once to activate the account. Securely send the **Login ID and Password** to your app provider.

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.