

Enabling and Disabling 'Enterprise Application' Solutions from the Concur App Center

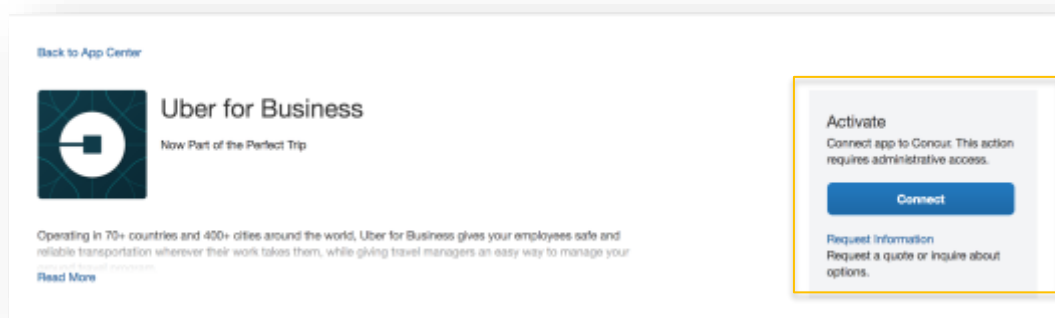
Basic Configurations

Enabling an App

This guide will provide the steps to enable an enterprise application. Enabling an Enterprise application does require administrative permissions. This guide will provide information on the permission required, adding the permissions for existing users and enabling the application.

Depending on the application, there are two methods of enabling the integration:

- **Connect from the App Center.** Note: Apps eligible for this type of connection utilize [OAuth2.0 Company-Level Authorization](#) and will have a “Connect” button displayed within the app listing.



- **Username and password.** All other apps utilize this connection method. [Skip to instructions](#)

Connecting from the App Center

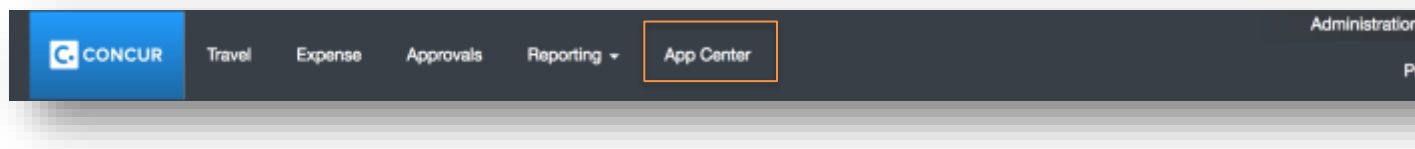
To enable an app the:

- Concur App Center must be enabled for your company
- User enabling the app must have the appropriate credentials

Step 1: Confirm the App Center is enabled

Activating an Enterprise applications requires that your company has enabled the App Center. If the App Center is enabled, you will see the “App Center” tab when logged into Concur.

If the App Center tab is unavailable, please log a ticket with the Concur Helpdesk.



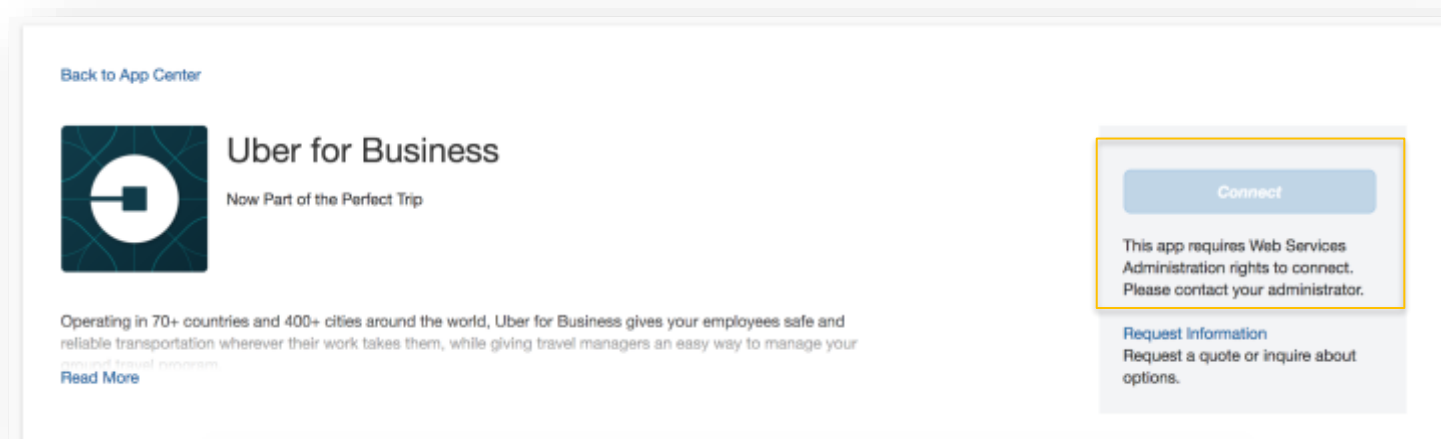
Step 2: Add or Check Permissions

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.

If you do not have the appropriate permissions to activate the app, the “connect” button will be disabled as shown below.

If the connect button is enabled, skip to step 3.

A user at your company with the appropriate permissions is required to activate the application. The instructions below provide information on adding the **Web Service Administrator** permissions for users that will be responsible for enabling and disabling enterprise applications.



How to assign the WS Admin User Permission in Concur Standard Edition:

Click Administration and then Setup. Select Users from the menu on the left and click select the user to provide access.

Reimbursement Method
 -Please Select-

User Permissions Check all that apply

Cognos Reporting Access
 Select One ..

Expense <input checked="" type="checkbox"/> Can Administer <input checked="" type="checkbox"/> Can Process Expense Reports <input checked="" type="checkbox"/> Can Submit Expense Reports <input checked="" type="checkbox"/> Can Approve Expense Reports	Invoice <input checked="" type="checkbox"/> Is Invoice Admin? <input type="checkbox"/> Is Invoice AP User? <input checked="" type="checkbox"/> Is Invoice Owner? <input checked="" type="checkbox"/> Is Invoice Approver? <input type="checkbox"/> Is Purchasing Admin? <input checked="" type="checkbox"/> Is Invoice Vendor Manager? <input checked="" type="checkbox"/> Is Invoice Processor? <input checked="" type="checkbox"/> Is Invoice Payment Manager?	Purchase Request <input type="checkbox"/> Is Purchase Request User? <input type="checkbox"/> Is Purchase Request Approver? <input type="checkbox"/> Is Central Receiver?
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- **Permissions:** Select "Can Administer" check box

How to assign the WS Admin User Profile in Concur Professional Edition:

Click into the **Administration** tab & then click into the **Company Admin** menu. Within the **Administration** area, click **User Permissions**.

CONCUR Expense Administration App Center Help Profile

Company Expense Invoice

Company Admin Home

Company Admin

- Approval Queues
- Billing Administrator
- Company Locations
- Org Unit Admin
- Report Admin
- Text Customization
- Security Keys
- Password Administrator
- Manage Custom Fields
- Calendar Integration Admin
- Company Settings
- Share Custom Fields
- Login URL Manager

User Administration

- User Administration
- Add User
- Self-Registration Setup
- Self-Registration Approval
- Send Mobile Instructions
- User Permissions**
- Company Groups

Travel Expense Request Invoice Reporting Supplier Portal

Save Cancel

Step1. Modify Roles By:
 User Name: [wsadmin]

Step2. Search Text: [wsadmin] Search What: [Name, Email, Log-in] Search

Step3. User Name to Assign Roles:
 Admin, WS

Show Users in Only This Employee Group Configuration:
 All Users I Can Access

Available Roles

- Shared Configuration Administrator (restricted)
- Sponsor
- Tax Administrator
- Tax Administrator-Restricted
- Training Administrator
- Web Services Administrator**

Add >> Remove <<

Roles for this User

- App Center Listing Administrator
- Clqbook User
- Expense User
- Travel and Expense User

- Find the user whom will activate the application and select **Add** to grant **Web Services Administrator** Permission.

Step 3: Enable the App

The Concur administrator who has been named in the newly created WS Admin Profile logs into Concur with the new credentials. The client may then connect to the application from the App Center. The full client guide can be found here:

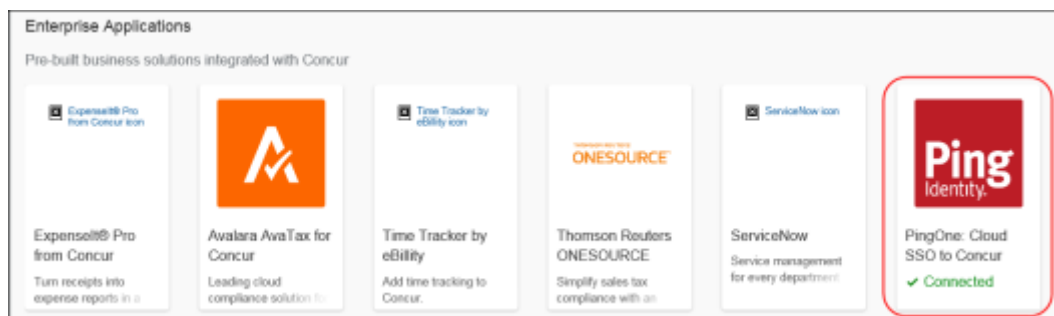
[App Center Administration Guide](#)

Disabling an app from the App Center

The administrator can disconnect from an app at any time. As soon as the app is disconnected, the integration will be stopped.

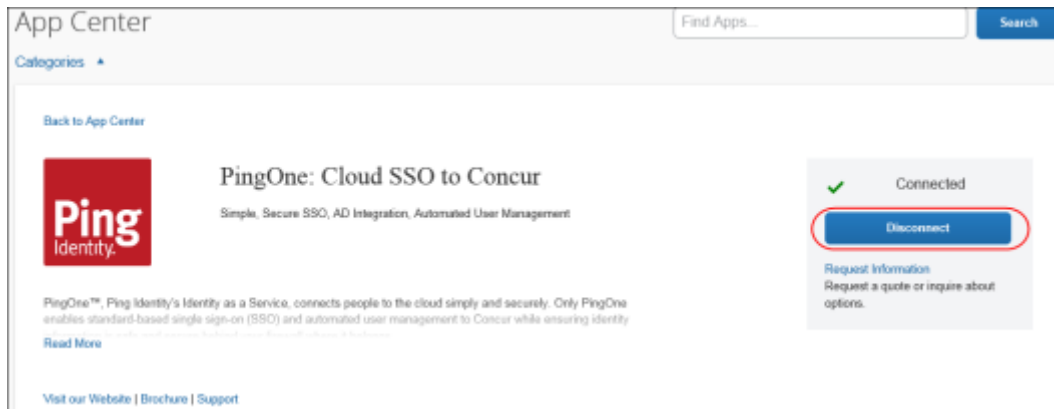
Step 1: Select the app listing in the App Center

Applications can be found utilizing search or the categories filter. Enterprise integrations will be found in the “Enterprise Applications” section of the App Center. Click on the listing you would like to disconnect.



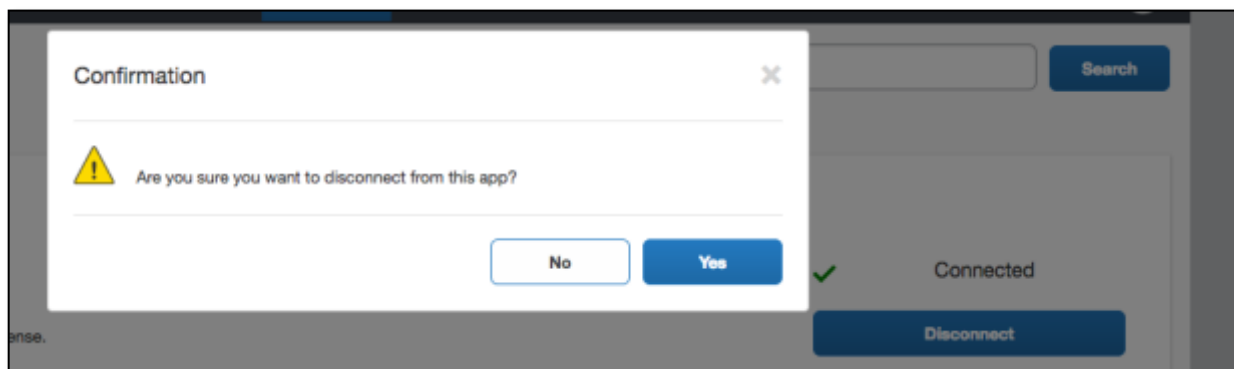
Step 2: Click Disconnect

Within the app, administrators with the appropriate credentials will see the option to “disconnect”



Step 3: Confirm Disconnect

Click “Yes” to confirm disconnect and complete the process.



The “Connected” indication will no longer appear.

Connecting using a username and password

Step 1: Create & Transfer Credentials

Note: This step can be completed by your own authorized Concur Administrator. 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**.

CONCUR | Administration | Help

Travel Expense Reporting App Center

Expense Settings | Travel Settings | Company

Expense Setup for Standard Edition Client

Need help? [How it works](#)

- Accounting
- Policy Groups
- Cost Tracking
- Expense >
- Users**
- Reporting Configuration
- Localization

USERS

This is where you add users, search for existing users, and update user information. Click **Create/Edit User** to add a user. If you have a large number of users, consider using **Import Users** instead. If you are implementing travel with expense, be sure to update the travel class and custom profile field steps in the travel wizard before you add users.

[Skip](#) [Previous](#) [Next](#)

[Save](#) [Cancel](#)

☐ Automatically send invite email on save

User Information

Employee Administration Country:
Employee First Name:
Employee Last Name:
Middle Name:

QuickBooks Vendor Name:
Email Address:
Country of Residence:
State/Province:

Locale:
Reimbursement Currency:
☐ Exempt from Expense Type Limit rules?
Department:

☐ Is Billable? (Invoice)
Customer:Project:
Non Rebill Customers:Project:
Project Name:

Client/Prospect:
☒ Active

Manager:

Organization Unit:
Travel policy:

Reimbursement Method:

User Permissions [Check all that apply](#)

Cognos Reporting Access:

Expense

☒ Travel and Expense Administrator
☐ Can Process Expense Reports
☒ Can Submit Expense Reports
☐ Can Approve Expense Reports
☐ Can Limit Approve Reports

Additional configurations

Travel

☐ Travel Only Administrator
☐ Guest booking
☐ Concur TripLink User
☐ TripLink Travel Policy Admin
☐ Report 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** 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 'User Detail' form in the Concur Professional Edition interface. The 'Administration' tab is selected in the top navigation bar. The 'Company Admin' menu is open on the left, and the 'Add User' option is highlighted. The form contains the following fields and values:

- General Settings:**
 - CTE Login Name*: (must be suffixed with a valid domain) WSAdmin-InsertAppName-@-InsertCompanyDomain.com
 - Password*: *****
 - Verify Password*: *****
- Personal Information:**
 - Title:
 - 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

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

CONCUR

Expense

Administration

App Center

Help

Company

Expense

Invoice

Company Admin Home

Travel

Expense

Request

Invoice

Reporting

Supplier Portal

Save

Cancel

Step1. Modify Roles By:

Step2. Search Text:

Search What:

Search

User Name

wsadmin

Name, Email, Log-in

Step3. User Name to Assign Roles:

Show Users in Only This Employee Group Configuration:

Admin, WS

All Users I Can Access

Available Roles

Roles for this User

Groups

Shared Configuration Administrator (Restrict...

App Center Listing Administrator

Sponsor

Clickbook User

Tax Administrator

Expense User

Tax Administrator-Restricted

Travel and Expense User

Training Administrator

Web Services Administrator

Add >>

Modify >

<< Remove

Company Admin

Approval Queues

Billing Administrator

Company Locations

Org Unit Admin

Report Admin

Text Customization

Security Keys

Password Administrator

Manage Custom Fields

Calendar Integration Admin

Company Settings

Share Custom Fields

Login URL Manager

User Administration

User Administration

Add User

Self-Registration Setup

Self-Registration Approval

Send Mobile Instructions

User Permissions

Company Groups

CONCUR

Expense

Administration

App Center

Help

Company

Expense

Invoice

Company Admin Home

Travel

Expense

Request

Invoice

Reporting

Supplier Portal

Save

Cancel

Step1. Modify Roles By:

Step2. Search Text:

Search What:

Search

User Name

wsadmin

Name, Email, Log-in

Step3. User Name to Assign Roles:

Show Users in Only This Employee Group Configuration:

Admin, WS

All Users I Can Access

Available Roles

Roles for this User

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Shared Configuration Administrator (Restrict...

App Center Listing Administrator

Sponsor

Clickbook User

Tax Administrator

Expense User

Tax Administrator-Restricted

Travel and Expense User

Training Administrator

Web Services Administrator

Add >>

Modify >

<< Remove

Company Admin

Approval Queues

Billing Administrator

Company Locations

Org Unit Admin

Report Admin

Text Customization

Security Keys

Password Administrator

Manage Custom Fields

Calendar Integration Admin

Company Settings

Share Custom Fields

Login URL Manager

User Administration

User Administration

Add User

Self-Registration Setup

Self-Registration Approval

Send Mobile Instructions

User Permissions

Company Groups

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.

