

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 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**.

Set up Expense for JessicaPankovSandbox

Need help? [Learn about this step](#) [How it works](#)

5) Users

User Information
This is where you add users, search for existing users, and update user information.

☒ Automatically send invite email on save

User Information

Login (email address) Password Retype Password

Employee Administration Country Employee First Name Employee Last Name Middle Name

Employee ID Email Address Country of Residence State/Province

Locale Reimbursement Currency ☒ Active ☐ Exempt from Expense Type Limit rules?

Manager

Reimbursement Method

User Permissions Check all that apply

Cognos Reporting Access

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"** 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.

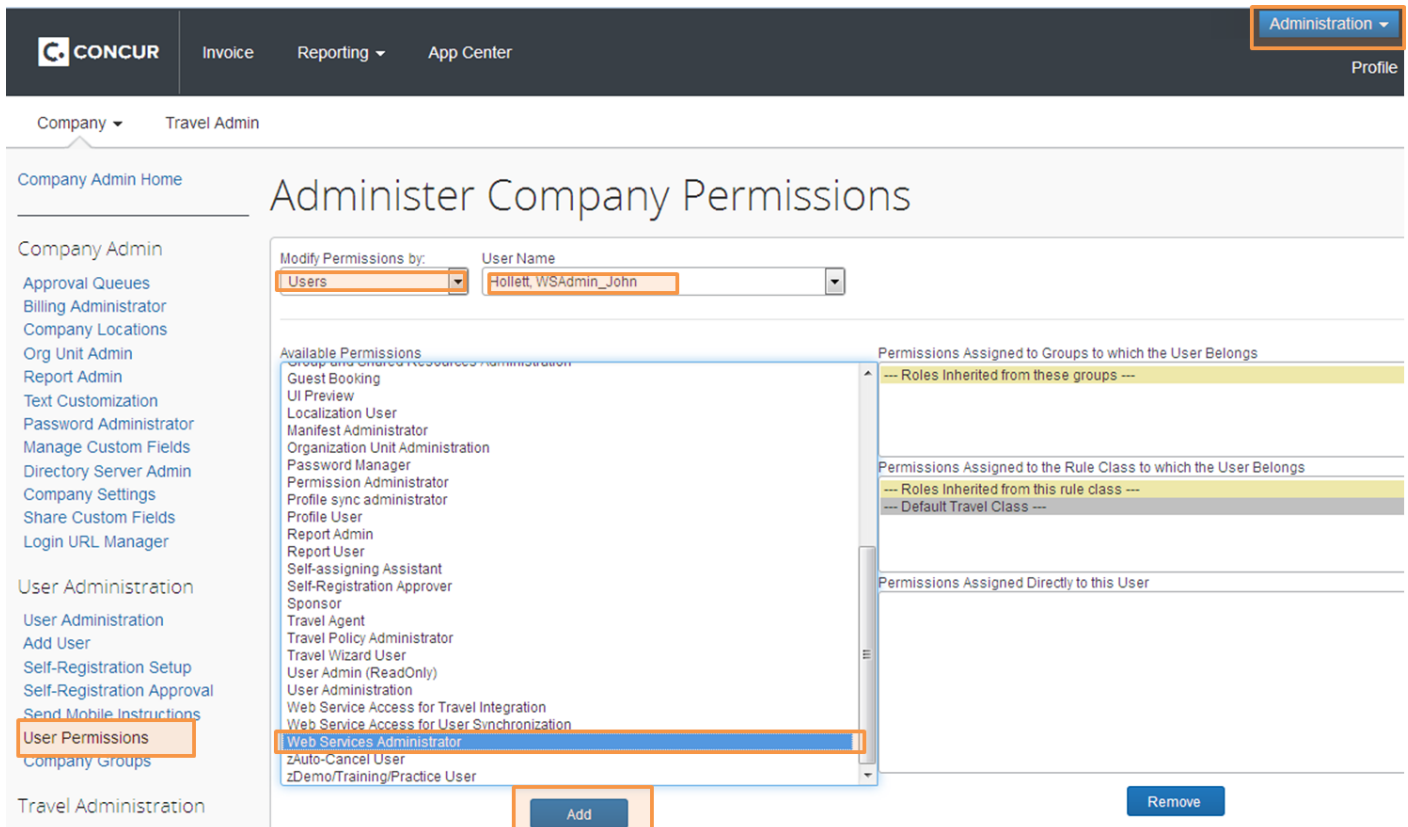
How to Create a WS Admin User Profile in Concur Professional Edition:

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

The screenshot shows the Concur User Detail form. The top navigation bar has 'Administration' highlighted. The left sidebar has 'Company Admin' and 'Add User' highlighted. The main form area is titled 'User Detail' and has buttons for 'Save', 'Save and Notify New User', 'Save and New', and 'Cancel'. The 'General Settings' section includes 'CTE Login Name*' (highlighted) with the value 'WSAdmin-AppProviderName@YourCompanyDomain.com', 'Password*', and 'Verify Password*'. The 'Personal Information' section includes 'First Name*' (highlighted) with the value 'WSAdmin_<Insert Real Name>', 'Last Name*' (highlighted) with the value '<Insert Administrator's Real Last Name>', and 'Email Address' with the value 'WS_Admin-AppProviderName@YourCompanyDomain.com'. Other fields include 'Title', 'Middle Name', 'Nickname', 'Suffix', 'Account Activation Date', 'Account Termination Date', 'Employee ID*', and 'Login URL Manager'.

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 'Administer Company Permissions' page in the Concur Administration interface. The top navigation bar includes 'CONCUR', 'Invoice', 'Reporting', 'App Center', and 'Administration' (highlighted). The left sidebar shows 'Company Admin' and 'User Administration' sections. In the 'Company Admin' section, 'User Permissions' is highlighted. The main content area shows the 'Administer Company Permissions' page with the following details:

- Modify Permissions by:** Users (dropdown)
- User Name:** Hollett, WSAdmin_John (dropdown)
- Available Permissions:** A list of permissions including 'Web Services Administrator' (highlighted).
- Permissions Assigned to Groups to which the User Belongs:** Roles inherited from these groups.
- Permissions Assigned to the Rule Class to which the User Belongs:** Roles inherited from this rule class.
- Permissions Assigned Directly to this User:** (Empty list)
- Buttons:** 'Add' and 'Remove' buttons at the bottom.

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

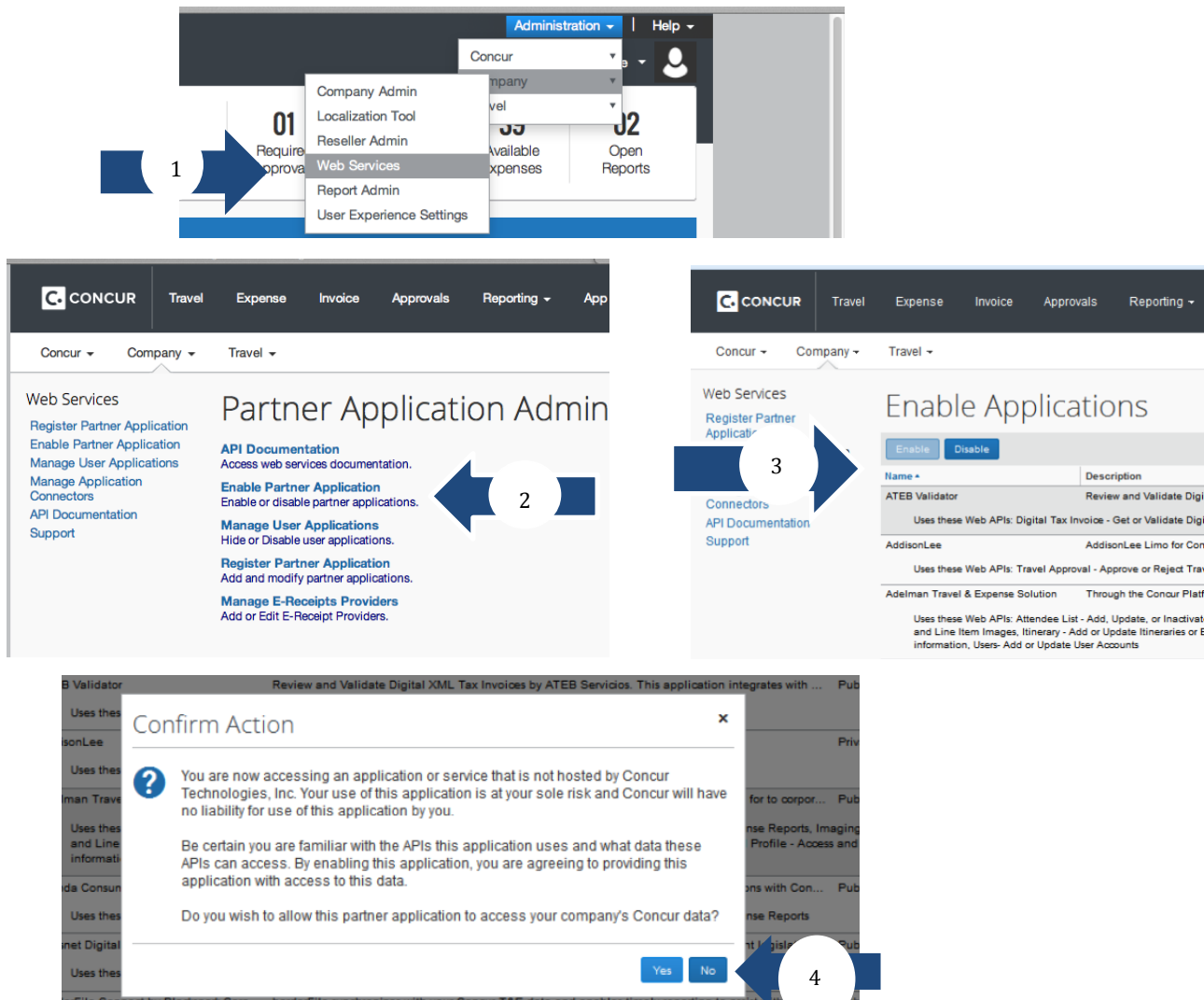
- Find the new WSAdmin User and select **Add** to grant **Web Services Administrator** Permission.
- Ensure the WSAdmin profile also has the Expense User, Travel User, & Invoice User permissions or roles for apps integrating with Expense, Travel, and/or Invoice Services respectively. The system will 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.



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

Step 2: 'Partner Application Admin' page. The 'Enable Partner Application' link is highlighted.

Step 3: 'Enable Applications' page. The 'Enable' button is highlighted.

Step 4: 'Confirm Action' dialog box. The 'Yes' button is highlighted.

Name	Description
ATEB Validator	Review and Validate Digital XML Tax Invoices by ATEB Services. This application integrates with ... Pub
AddisonLee	AddisonLee Limo for Con
Adelman Travel & Expense Solution	Through the Concur Platf

Confirm Action

You are now accessing an application or service that is not hosted by Concur Technologies, Inc. Your use of this application is at your sole risk and Concur will have no liability for use of this application by you.

Be certain you are familiar with the APIs this application uses and what data these APIs can access. By enabling this application, you are agreeing to providing this application with access to this data.

Do you wish to allow this partner application to access your company's Concur data?

Yes No