Release Notes	
Concur Connect	
Month	**Audience**
June 2013	Concur Clients

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Release Notes

General Updates

Concur App Center Coming Soon

Overview

The Concur App Center is a new tab in Concur that allows users to discover and enable applications that partners and Concur have developed to work with Concur products.

> **Business Purpose**
>
> *This feature provides a central resource for users and companies to enable services integrated with the Concur.*
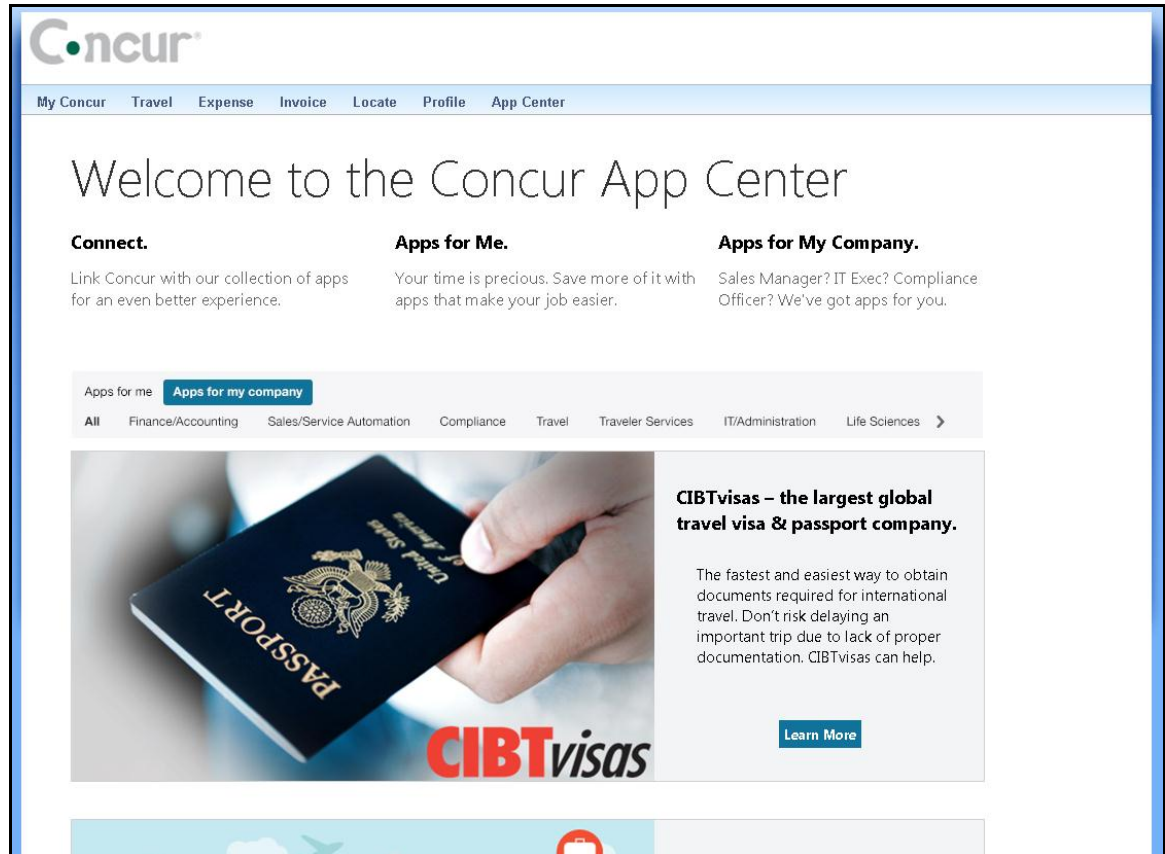
The applications use Concur's Platform to add value to Concur products by providing integration and additional management tools. The App Center has two tabs:

- **Apps for Me**: This tab contains applications that an end user can activate to authorize a secure exchange of data. TripIt is an example of this type of app. The end user can connect their Concur account to their TripIt account to enable trips booked in Concur to automatically flow into their TripIt account. If they do not have a TripIt account, they can learn more about the application and visit the TripIt website or the app store on their mobile device to create an account. Purchase and downloading of apps does not take place in the App Center. Additional examples include Concur Mobile and various forms of e-receipts. Open Booking users will soon be able to connect their Concur accounts with various travel suppliers via the App Center, enabling itineraries booked on the supplier's website to flow into Concur.

- **Apps for My Business**: This tab contains applications which serve a variety of business functions. The apps need to be authorized by a Concur Administrator as they interact with data at a company-wide level or for multiple users. Example business apps include:

  - Integrations from VAT reclaim partners who extract expense data from Concur in order to calculate and process your company's VAT reclaim on eligible expenses.

  - The Concur Connector for Salesforce which integrates contacts and opportunity data between Concur and Salesforce.com.

The App Center is not a store- the users and administrators can use it to learn about the applications and begin the procurement process. Once the user or administrator selects the app listing, they view the **Details** page:

User applications, like TripIt, provide a **Connect** button that the user can click to connect their Concur account with their account at the partner's site.

The partners that create applications go through a certification process with Concur. Concur creates the App Center listing, which must be reviewed and approved by the partner and Concur before the listing can be active.

The App Center is also available on the concur.com website:

Tentative Release Schedule

The App Center on concur.com is available now: https://www.concur.com/appcenter

The in-product App Center will be made available to users in the US, UK and Australia on the following schedule. This release schedule is tentative and may change.

July 2013 Release: Standard US, UK and Australian Users

August 2013 Release: Professional US, UK and Australian Users

October 2013 Release: All other users, with localized listings.

Web Services

Fetch Attendee: Selected Attendee Types Automatically Set to Not Allow Manual Entry of Attendees

Overview

Business Purpose

This enhancement enforces the recommended configuration for the attendee type used by Fetch Attendee.

Clients using the Fetch Attendee callout want attendees to be imported from a system of record into Concur. They don't want employees to manually add attendees. In the June release, the system automatically sets the attendee type to not allow manual entry of attendees when it is selected for the Fetch Attendee application connector.

Professional clients can choose to modify this setting, in **Administration** > **Expense Admin** > **Attendees**.

   Refer to the *Fetch Attendee* callout documentation at
    http://developer.concur.com for more information.

Configuration

An application connector must be created and registered with Concur before developers can use this feature.

   Refer to the *Callouts – Core Concepts* information at
    http://developer.concur.com for more information.

Expense Report: Post Expense Entry Attendee New Element

Overview

The Post Expense Entry Attendee function of the Expense Report web service has been updated to include a new optional element.

> **Business Purpose**
>
> *This enhancement provides a method to specify whether existing attendees should be updated.*

The UpdateExisting element allows developers to specify whether the request should update an existing attendee. The system checks the External ID of the attendee to see if the attendee already exists. If this element is set to true or not included in the request, Concur will update the matching attendee record with the values included in the request.

   Refer to the *Expense Report* web service documentation at
    http://developer.concur.com for more information.

Configuration

A partner application must be created and registered with Concur before developers can use this feature.

   Refer to the *Web Services – Core Concepts* information at
    http://developer.concur.com for more information.

Expense Report: Get Expense Report Details Updated

Overview

> **Business Purpose**
>
> *This enhancement provides a method to learn the report owner's reimbursement method.*

The Get Expense Report Details function of the Expense Report web service has been updated to include a new element. The ReimbursementMethodCode element allows developers to identify the user's specified reimbursement method, and use this information in financial integration.

  Refer to the *Expense Report* web service documentation at http://developer.concur.com for more information.

Configuration

A partner application must be created and registered with Concur before developers can use this feature.

  Refer to the *Web Services – Core Concepts* information at http://developer.concur.com for more information.

Itinerary: Identifiers Now Encrypted

Overview

The Itinerary web service has been updated to supply encrypted values for the **id**, **tripid**, and **itinlocator** elements for all functions. The Itinerary functions now support these encrypted values as inputs.

> **Business Purpose**
>
> *This enhancement provides better data security for itineraries.*

  Refer to the *Itinerary* web service documentation at http://developer.concur.com for more information.

Configuration

A partner application must be created and registered with Concur before developers can use this feature.

  Refer to the *Web Services – Core Concepts* information at http://developer.concur.com for more information.

Itinerary: Booking Source Set to Vendor Name

Overview

The Itinerary web service has been updated to use the Vendor Name in new booking POSTs as the Booking Source. This change makes the booking source much clearer, as it no longer uses an internal Concur code value.

> **Business Purpose**
>
> *This enhancement provides better information about the source of bookings.*

📖   Refer to the *Itinerary* web service documentation at http://developer.concur.com for more information.

Configuration

A partner application must be created and registered with Concur before developers can use this feature.

📖   Refer to the *Web Services – Core Concepts* information at http://developer.concur.com for more information.

Travel Profile: New Company-Wide Authorization Functionality

Overview

The Travel Profile web service has been enhanced to allow partners to access the travel profile data for an entire

> **Business Purpose**
>
> *This enhancement provides new functionality for partners that need access to company wide data.*

company if they complete the OAuth process with a user that has an administrative role in the company. This functionality includes the following features:

- The **Get Travel Profile** function has been updated with three new child elements in the **General** element of the response: LoginID, XMLProfileSyncId, ProfileLastModifiedUTC. These elements will allow the partners to identify the users.

- There is a new function, **Get List of Updated Travel Profiles**, that is only available to partners with access to company-wide data. This function can be used to retrieve the values for the three new elements above for profiles that have been updated after the supplied date and time. These values can then be used with the **Get Travel Profile** function to get the full travel profile information.

📖   Refer to the *Travel Profile* web service documentation at http://developer.concur.com for more information.

Configuration

A partner application must be created and registered with Concur before developers can use this feature. The OAuth process must be completed with a user with one of the following roles, before the partner can access the company-wide information: Professional - Web Services Administrator, Standard or Sandbox - Can Administer.

📖   Refer to the *Web Services – Core Concepts* information at http://developer.concur.com for more information.

Notification Subscription: New Company Wide Subscription Functionality

Overview

The Concur Platform has been enhanced to allow partners to receive notifications when all users of a company perform certain actions. This

Business Purpose

This enhancement provides new functionality for partners that need access to company wide notifications.

functionality is available to partners who complete the OAuth process with an administrative user at the company granting them access. This functionality includes the Company Notification Subscription resource, which has two POST functions. These functions are: Post Company Notification Subscription for Itinerary Changes, and Post Company Notification Subscription for Travel Profile Changes.

    📖   Refer to the *Company Notification Subscription* resource documentation at http://developer.concur.com for more information.

Configuration

A partner application must be created and registered with Concur before developers can use this feature. The OAuth process must be completed with a user with one of the following roles, before the partner can receive the company-wide notifications: Professional - Web Services Administrator, Standard or Sandbox - Can Administer.

    📖   Refer to the *Web Services – Core Concepts* information at http://developer.concur.com for more information.

Financial Integration Platform

The Financial Integration Platform is a collection of functions in several web services that make it possible for developers to create packaged connectors for popular accounting and financial systems that support the **Transaction Processing** methodology. Functionality released this month allows the developers to ensure that the necessary transactions to account for expenses and arrange payment for the expenses in a specified report were created in the financial system prior to committing the expense report in Concur Expense. Future releases will include enhancements to this platform that expand the tools available for all Concur Expense products.

This release contains the following enhancements:

Expense Report: Post Integration Status Developer Preview

Overview

The Expense Report web service has been updated with a new resource, Integration Status. This resource has the Post Integration Status function. This is the key feature of the Financial

> **Business Purpose**
>
> *This enhancement provides a method for developers to integrate Concur Expense to financial systems without using an accounting extract.*

Integration Platform. The Financial Integration Platform is a collection of functions in the Expense Report and Payment Batch web services that make it possible for developers to create packaged connectors for popular accounting and financial systems that support the **Transaction Processing** methodology. This Expense Report resource allows developers to ensure that the necessary transactions to account for expenses and arrange payment for the expenses in a specified report were created in the financial system prior to committing the expense report in Concur Expense. If they were, the developer uses this function to indicate the report was successfully integrated and move the report forward in the workflow to the Paid. In Concur Expense when a report arrives at the Paid workflow step the report is committed meaning its data can't be changed and can't be sent back in the workflow.

📖   Refer to the *Draft Documentation* and the *Creating Financial Connectors for Concur Expense* page at http://developer.concur.com for more information.

Configuration

A partner application must be created and registered with Concur before developers can use this feature.

📖   Refer to the *Web Services – Core Concepts* information at http://developer.concur.com for more information.

Company Setting to Use Concur's Platform for Financial Integration

Overview

For clients that want to take advantage of the Financial Integration Platform, a new entity setting is now available in

> **Business Purpose**
>
> *This enhancement allows companies to use the Financial Integration Platform.*

HMC. This setting allows Concur staff to set the entity to use Concur Connect web services instead of the Accounting Extract for expense report accounting integration. When set to Concur Connect it prevents the accounting extract job from running. This allows developers to use the POST Integration Status endpoint to indicate a specified report has been successfully accounted for in external financial systems and move the report forward in the workflow.

Standard clients see the following behaviors:

- When the entity setting is set to Concur Connect, it will remove the **Download File** link in Payment Manager.

- Clients that use the QuickBooks Integration will not be able to set the entity setting to Concur Connect.

- When the company setting is set to Concur Connect, the Connect to QuickBooks button will no longer appear on the Introduction page of Setup.

Configuration

Contact Concur Client Services to have this feature activated for your company.

Concur Salesforce Connector

The updated Concur Salesforce Connector will be released at the end of June.

Support for Multiple Salesforce Organizations

Overview

The Concur Salesforce Connector has been updated to support companies with multiple Salesforce organizations and one Concur company. Please note the following about this functionality:

> **Business Purpose**
>
> *This enhancement supports companies with one Concur company and multiple Salesforce organizations.*

- The connector must be installed individually in each Salesforce organization.

- When a Concur user authenticates to Salesforce, their Salesforce user account determines which organization they will be connected to.

- The Salesforce administrator must create a scheduled job in their organization after the connector installation in order to get Opportunity spend aggregation data.

  - In future releases, this job will be used to track other cost object spend aggregation.

Resolved Issues

Web Service/ Direct Connect	Issue Description