PowerApprovals Implementation Guide for GP

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Mekorma

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1. What’s in this Guide?

Mekorma PowerApprovals Implementation Guide

PowerApprovals is Mekorma’s first commercial cross-platform and cross-browser mobile application written from the ground up on the Microsoft Power Platform, fully integrated with Mekorma Payment Hub for payment approvals. PowerApprovals takes full advantage of the Microsoft Azure platform security infrastructure capabilities to deliver a robust application to our customers.

This Implementation Guide will walk you through the following topics:

1. PowerApprovals Architecture and Security
2. Licensing Microsoft Power Apps for Mekorma PowerApprovals
3. Purchasing PowerApps Licenses
4. PowerApprovals Installation Prerequisites
5. Installing Microsoft On-Premises Data Gateway
6. Creating a Connection to Your On-Premises SQL Server in Your Power Apps Environment
7. Creating an Email Notification Agent in your Power Apps Environment
8. Downloading PowerApprovals
9. Importing PowerApprovals into Your Power Apps Environment
10. Getting the Application Web Link and QR Code
11. Sharing Mekorma PowerApprovals to Batch Approvers
12. Deploying the Power Apps Mobile Client
13. Integrating PowerApprovals with the Office 365 Connector
14. Mapping Power Apps approver accounts to Microsoft Dynamics GP login account
15. Upgrading PowerApprovals

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2. PowerApprovals Architecture and Security

Mekorma PowerApprovals leverages **Microsoft Power Apps** and **Power Automate** to display payment approval information for company approvers. Approval or rejection business logic is executed server-side, on your Microsoft Dynamics Great Plains (Dynamics GP) SQL Server, for security and reliability.

Approvers in your organization can access Dynamics GP data that they already have authorized access to. Before those users can connect to your Dynamics GP on-premises SQL Server, an **on-premises data gateway** needs to be installed and configured.

The gateway facilitates quick and secure behind-the-scenes communication. This communication flows from a PowerApprovals user in the cloud to your Dynamics GP on-premises SQL server and then back to the cloud.

A Power Platform or systems admin is usually the one who installs and configures a gateway. These actions might require special knowledge of your on-premises SQL server or server administrator permissions.

This section will help you understand PowerApprovals architecture and security by explaining how the on-premises data gateway works.

> For step-by-stop guidance on how to install and configure the gateway, refer to Installing Microsoft On-Premises Data Gateway.

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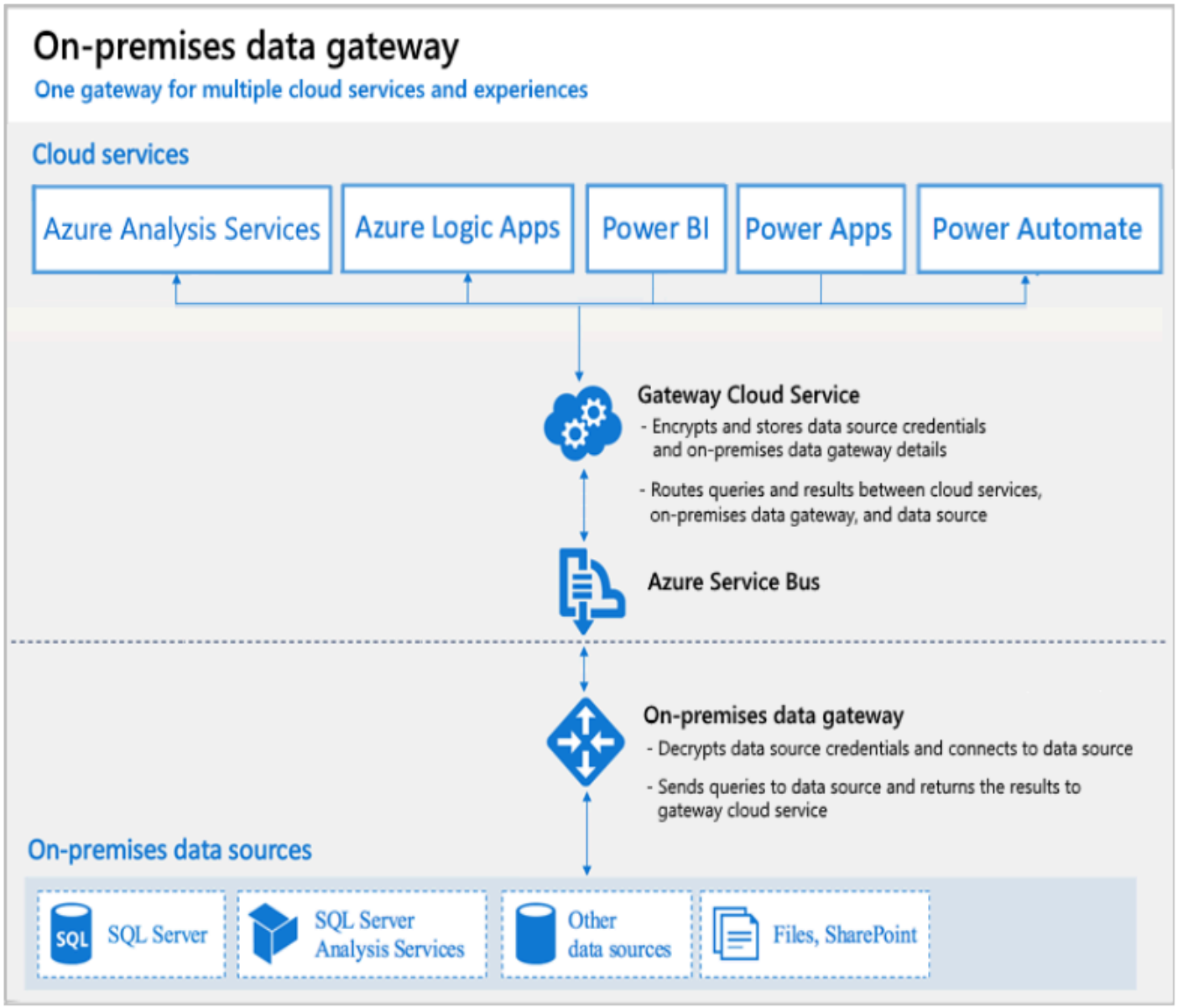
2.1. How the Gateway Works

Let’s look at what happens when you interact with an element that is connected to an on-premises data source:



1. The cloud service creates a query and the encrypted credentials for your on-premises Dynamics GP SQL Server. The query and credentials are sent to the gateway queue for processing.
2. The gateway cloud service analyzes the query and pushes the request to Azure Service Bus.
3. Azure Service Bus sends the pending requests to the gateway.
4. The gateway gets the query, decrypts the credentials, and connects to your Dynamics GP SQL Server with those credentials.
5. The gateway sends the query to your Dynamics GP SQL Server to be run.

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6. The results are sent from your Dynamics GP SQL Server back to the gateway and then to Power Apps. Power Apps then hands over the results to Power Approvals to let it know that the request was completed.
    - Queries can return large amounts of data. For such queries, data is temporarily stored on the gateway machine.
    - Data storage continues until all data is received from your Dynamics GP SQL Server.
    - The data is then sent back to the cloud service, in a process is called spooling. We recommend you use a solid-state drive (SSD) as the spooling storage.

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2.2. Authentication to On-Premises Data Sources

A stored credential is used to connect from the gateway to your Dynamics GP SQL Server. Regardless of the user, the gateway uses the stored credential to connect.

> There might be authentication exceptions like DirectQuery and LiveConnect for Analysis Services in Power BI, but these exceptions are not covered by this Implementation Guide, as they are not applicable to Mekorma PowerApprovals.

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2.3. Sign-in Account

You sign in with either a work account or a school account. This account is your organization account.

If you signed up for an Office 365 offering and didn’t supply your actual work email address, your account name might look like **nancy@contoso.onmicrosoft.com**. A cloud service stores your account within a tenant in Azure Active Directory (Azure AD). In most cases, the User Principal Name (UPN) of your Azure AD account matches your email address.

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2.4. Azure Active Directory

Microsoft cloud services use Azure AD to authenticate users. Azure AD is the tenant that contains usernames and security groups. Typically, the email address that you use for sign-in is the same as the UPN of your account.

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2.5. How Do I Tell What My UPN Is?

If you don’t know your UPN or are not a domain admin, open the command prompt on your machine and run the command **whoami /upn**. The result resembles an email address, but it’s the UPN on your local domain account.

Note: In some cases, you may receive the following message: “ERROR: Unable to get User Principal Name (UPN) as the current logged-on user is not a domain user.” Please consult with your system domain administrator or IT department to troubleshoot this issue.

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2.6. Synchronize an On-Premises Active Directory with Azure Active Directory

To maintain consistency, make sure the UPN matches for both your on-premises AD and Azure AD accounts.

Cloud services only recognize accounts that exist within Azure AD. If an account exists only in your on-premises AD, it will not be usable.

There are different ways to align your on-premises AD accounts with Azure AD.

Add accounts manually to Azure AD

Create an account on the Azure portal or within the Microsoft 365 admin center. Make sure the account name matches the UPN of the on-premises AD account.

Use the Azure AD Connect tool to synchronize local accounts to your Azure AD tenant

The Azure AD Connect tool provides options for directory synchronization and authentication setup. These options include password hash sync, pass-through authentication, and federation. If you’re not a tenant admin or a local domain admin, contact your IT admin to get Azure AD Connect configured.

Azure AD Connect ensures that your Azure AD UPN matches your local AD UPN. This matching helps if you’re using Analysis Services live connections with Power BI or single sign-on (SSO) capabilities.

For more information on the Azure AD Connect tool, please click here.

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3. Licensing Microsoft Power Apps for Mekorma PowerApprovals

Each approver user requires a Power Apps license to use PowerApprovals. This section describes how to purchase licenses and assign them to the company’s Power Platform environment.

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3.1. Power Apps Licensing Overview

General purpose, full Power Apps capabilities are licensed on a standalone basis. Limited Power Apps capabilities are included within various Office 365 and Dynamics 365 licenses; for more information, review Power Apps use rights included with Dynamics 365/Office 365 licenses.

A high-level overview of the licensing structure:

	Per user, per app	Per user
Licensing Scheme	Per app	Per user
Description	Allows individual user to run applications* for a specific business scenario based on the full capabilities of Power Apps	Equips users to run unlimited applications based on the full capabilities of Power Apps

**Each license allows end users to run two custom apps and access one custom portal*

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3.1.1. Standalone Power Apps Licensing

Customers that need general purpose and full capabilities of the platform should license Power Apps on a standalone basis. Licensing is supported on both a per user, per app basis as well as a per user basis. Both standalone licenses are fully featured.

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3.1.2. Power Apps Per App Plan

Power Apps per app plan allows organizations to get started with the platform at a lower entry point.

Customers on the per app plan generally start with one or two use case scenarios, i.e., Mekorma PowerApprovals, before adopting the platform more broadly. Power Apps per app plans are an attractive licensing option for end users that run only a few apps.

Power Apps per app plan allows individual users to run two custom applications (be it canvas or model or both) and access one custom portal based on the full capabilities of Power Apps.

Summary for Power Apps per app license

Plans and capabilities	Power Apps per app plan	
Run custom apps / portals	Run custom apps (both canvas and model driven)	Two apps
	Access custom portals	One custom portal
Connect to your data	Standard connectors	+
	Premium connectors	+
	On-premises data gateway	+
	Custom connectors	+
Store and manage data	Utilize Common Data Service	+
	Create and access custom entities (includes complex entities)	+
	Dynamics 365 restricted entities access	Read Only
Execute flows	Power Automate Use Rights	Within app context
	Classic Common Data Service non real-time and real-time workflows	+
Per license capacity	Common Data Service Database Capacity	50 MB
	Common Data Service File Capacity	400 MB
	Daily API request limit	1000 requests

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Infuse AI	AI Builder capacity add-on	$

Note:

- Embedded canvas apps within a model-driven app will not count towards the two app limit.
- A single user might be covered by multiple per app licenses to allow the user to use multiple solutions targeted at various business scenarios, without requiring a per-user license.
- Once a pool of Power Apps per app licenses are purchased, individual licenses need to be assigned to specific environments and to individual users (i.e., if the same app exists in two environments, a user would require two per app SLs to access both).
- The Power Apps per app plan is available to education customers under faculty and student pricing. Since these licenses are sold as tenant-level capacity and not assigned to users in AD, customers and partners will be responsible for ensuring that student pricing is only being applied to students. This means that when licenses are purchased with student pricing, the number of app licenses assigned to non-students (i.e., faculty) in the product may not exceed the number of faculty licenses purchased, as this would indicate that student licenses have been assigned to faculty

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3.1.3. Power Apps Per User Plan

Power Apps per user plans allow licensed users to run unlimited custom applications based on the full capabilities of Power Apps.

Summary for Power Apps per user license

Plans and capabilities	Power Apps per app plan	
Run custom apps / portals	Run custom apps (both canvas and model driven)	Unlimited
	Access custom portals	Unlimited
Connect to your data	Standard connectors	+
	Premium connectors	+
	On-premises data gateway	+
	Custom connectors	+
Store and manage data	Utilize Common Data Service	+
	Create and access custom entities (includes complex entities)	+
	Dynamics 365 restricted entities access	Read Only
Execute flows	Power Automate Use Rights	Within app context
	Classic Common Data Service non real-time and real-time workflows	+
Per license capacity	Common Data Service Database Capacity	250 MB
	Common Data Service File Capacity	2 GB
	Daily API request limit	5000 requests
Infuse AI	AI Builder capacity add-on	$

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3.1.4. Power Apps Use Rights Included with Office 365 Licenses

Limited Power Apps use rights are included with select Office 365 licenses to allow users to customize and extend Office 365 for productivity scenarios. However, these Power Apps licenses are not compatible with Mekorma PowerApprovals due to the use of SQL Server premium connector within our app.

Power Apps user rights with Office 365 licenses

Plans and capabilities	Power Apps per app plan	
Run custom apps / portals	Run custom apps (both canvas and model driven)	Unlimited
	Access custom portals	–
Connect to your data	Standard connectors	+
	Premium connectors	–
	On-premises data gateway	–
	Custom connectors	–
Store and manage data	Utilize Common Data Service	–
	Create and access custom entities (includes complex entities)	–
	Dynamics 365 restricted entities access	N/A
Execute flows	Power Automate Use Rights	+
	Classic Common Data Service non real-time and real-time workflows	N/A
Per license capacity	Common Data Service Database Capacity	–
	Common Data Service File Capacity	–
	Daily API request limit	2000 requests
Infuse AI	AI Builder capacity add-on	N/A

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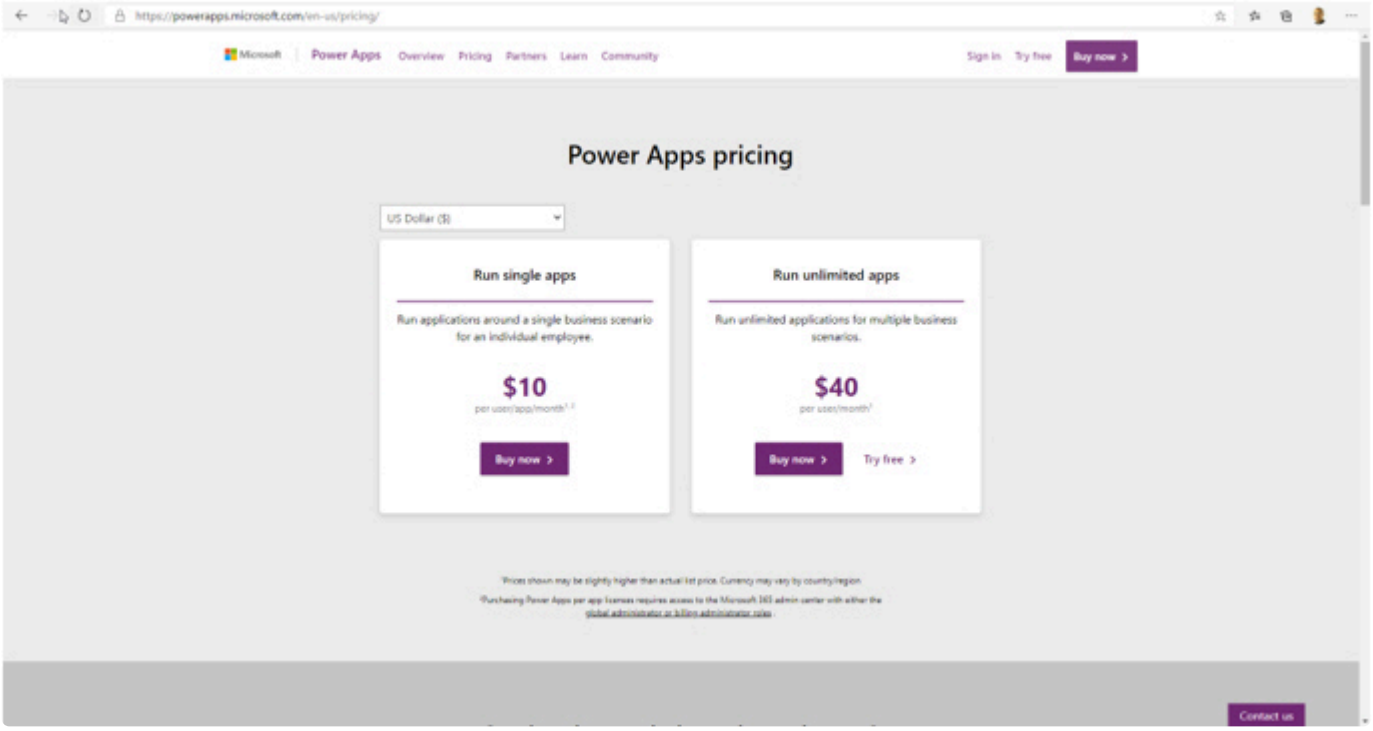
4. Purchasing Power Apps Licenses

Microsoft offers a simple way for both new and existing customers to acquire Power Apps. In the Power Apps Pricing portal, determine the type of license you would like to purchase.



From here you can choose to purchase the Power Apps per app plan or the Power Apps per user plan. Follow the instructions based on which plan you wish to purchase.

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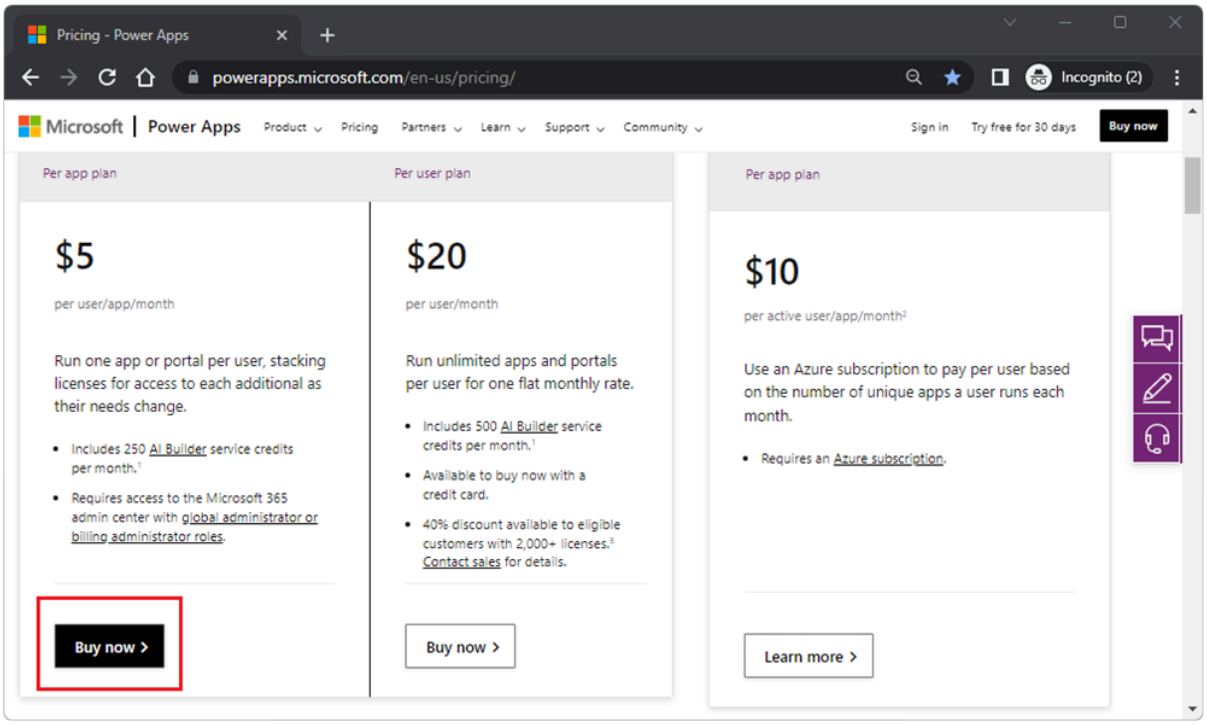
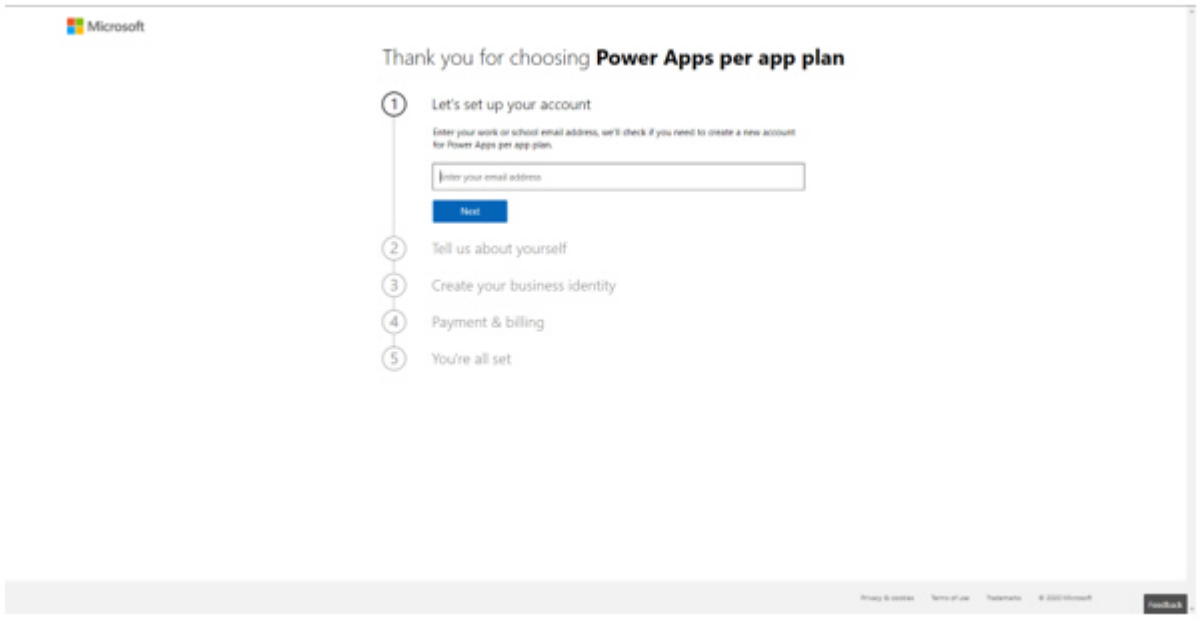
4.1. Purchasing Power Apps Per App Plan

Mekorma recommends that customers consider the standalone Power Apps per app plan if this is their first experience with Power Apps. This plan allows you to run Mekorma PowerApprovals app and the companion Power Automate workflow at a low entry cost. This plan also incorporates a 30-day trial period to test additional Power Apps features, at which time your purchased licenses go into effect.

1. Click **Buy now** under the per user/app/month column.



2. Enter your email address and click **Next** to continue.



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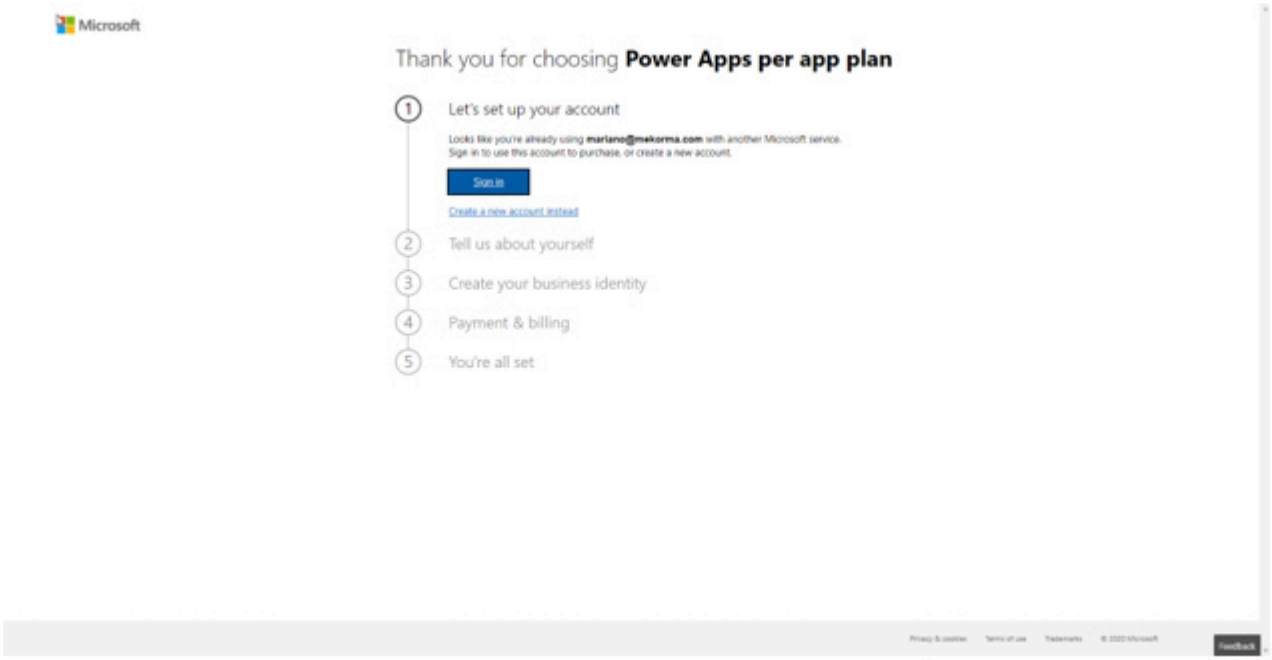
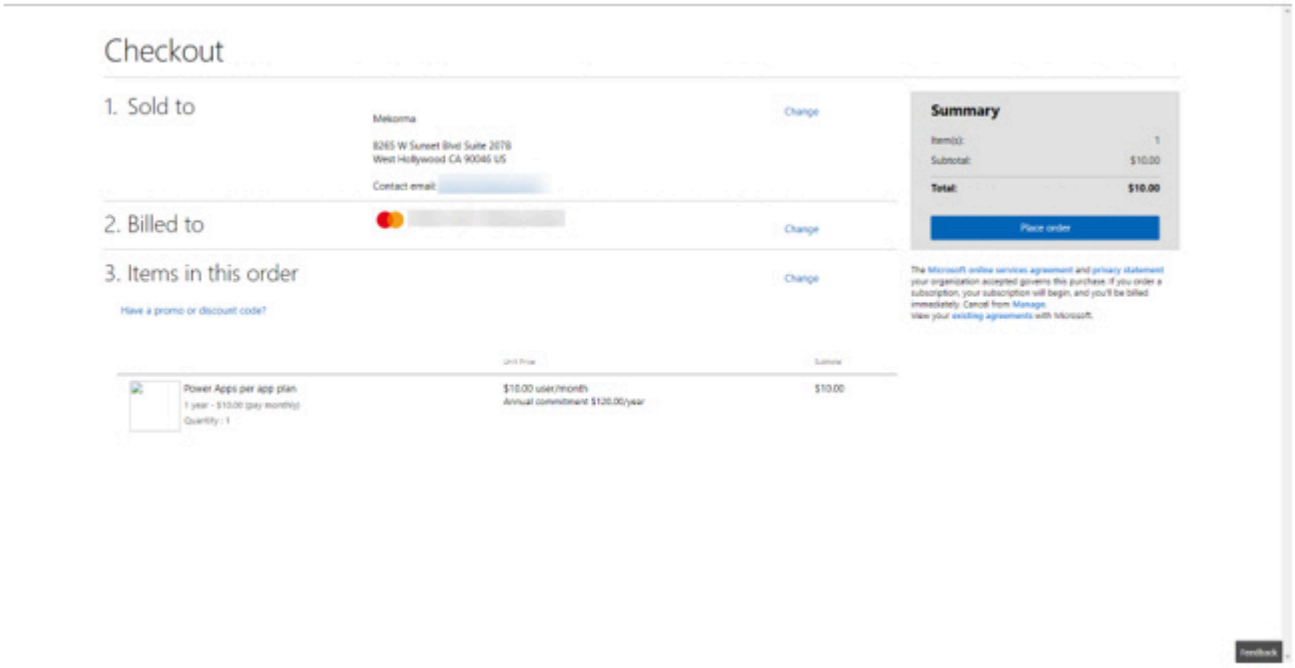
3. If you are already using another Microsoft service, you will be asked to sign in.



If you are not using any other Microsoft service, please follow all prompts carefully to establish your new service.

4. Upon signing in, you will be asked to confirm your billing information.



5. If you need to change the number of licenses being purchased, click the **Change** hyperlink under the Items in this order section.

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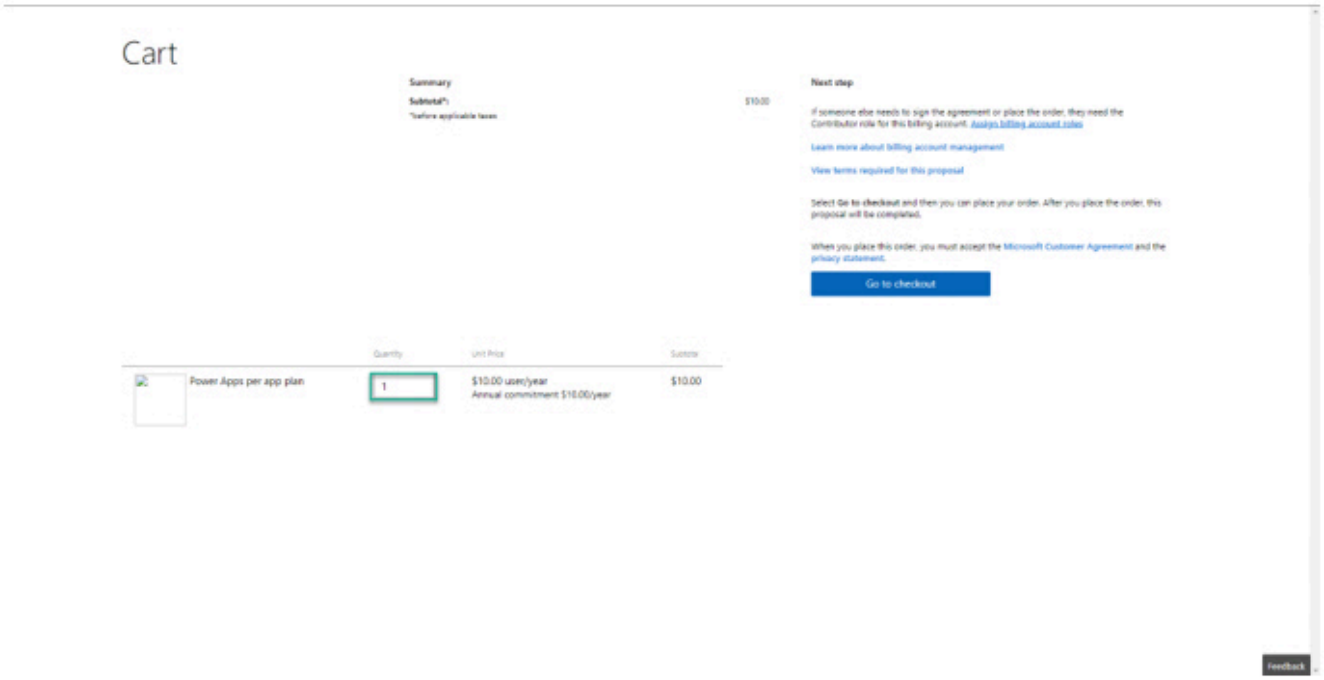

6. Enter the quantity of licenses being purchased, then select **Go to checkout** to complete your order. This returns you to the screen shown in step 4.

> Note: You must purchase an extra license for the environment administrator account, i.e., if you are licensing three approvers, you must purchase four licenses.

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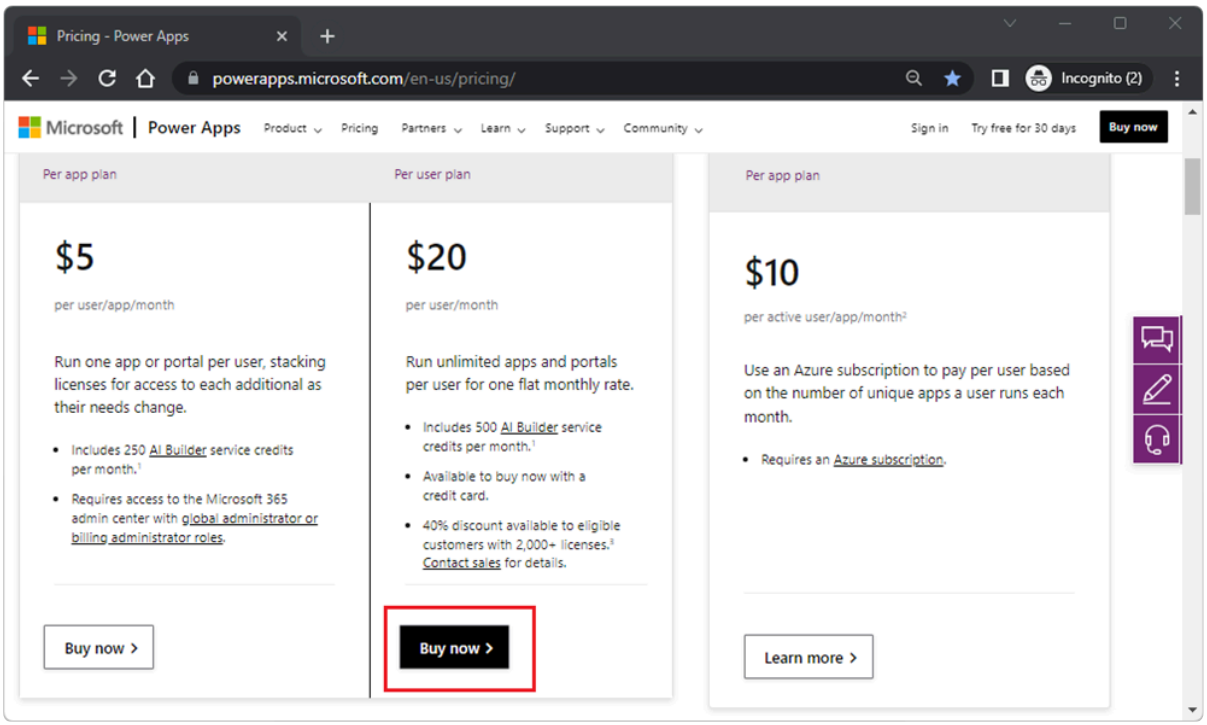
4.2. Purchasing Power Apps Per User Plan

We do recommend that customers consider the standalone Power Apps per user plan, if they are considering Power Apps as a true platform for mobile business applications. This plan will allow you to run unlimited apps and workflows used by those apps.

> If you are planning in having standalone workflows, please consider licensing Microsoft Power Automate.

1. Click on the **Buy now** button under the per user/month column.



2. Enter your email address to continue.

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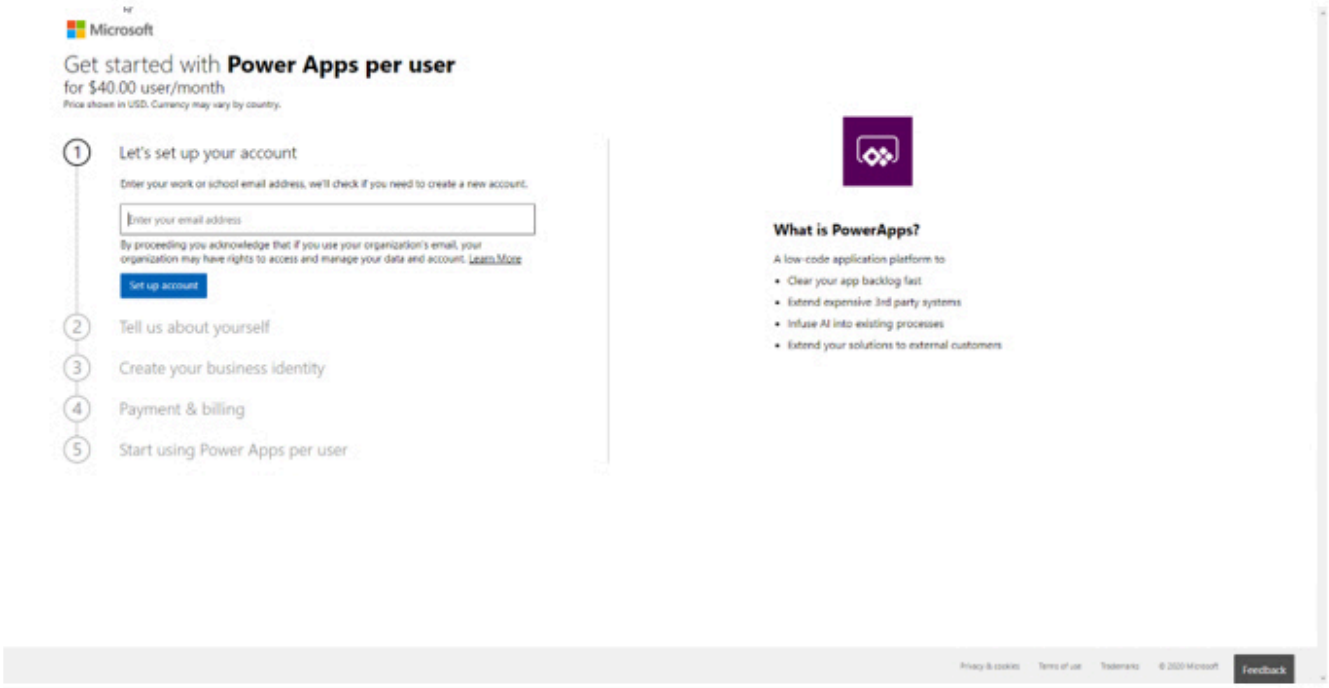
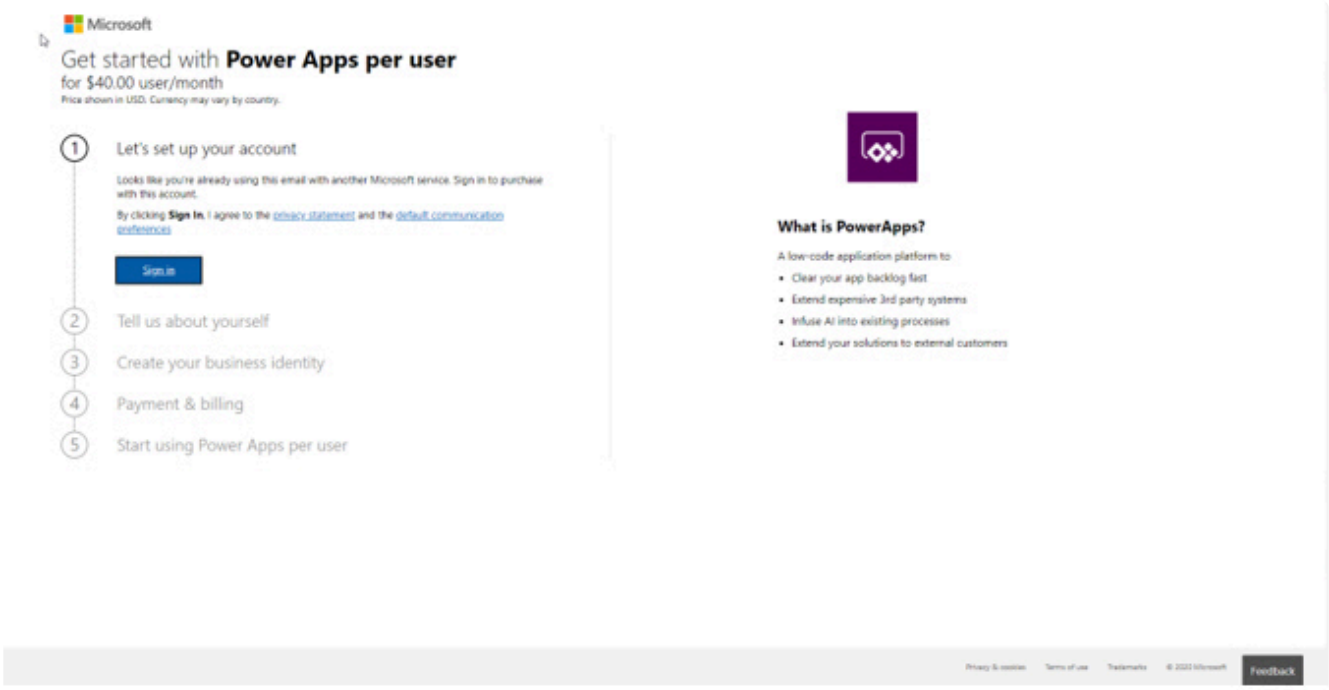


Click on **Set up account** to continue.

3. If you are already using other Microsoft services, you will be asked to sign in.



Click **Sign in** to continue.

> If you are not using any other Microsoft service, please follow all prompts carefully to establish your new service.

4. Upon signing in, you will be asked to confirm your billing information.

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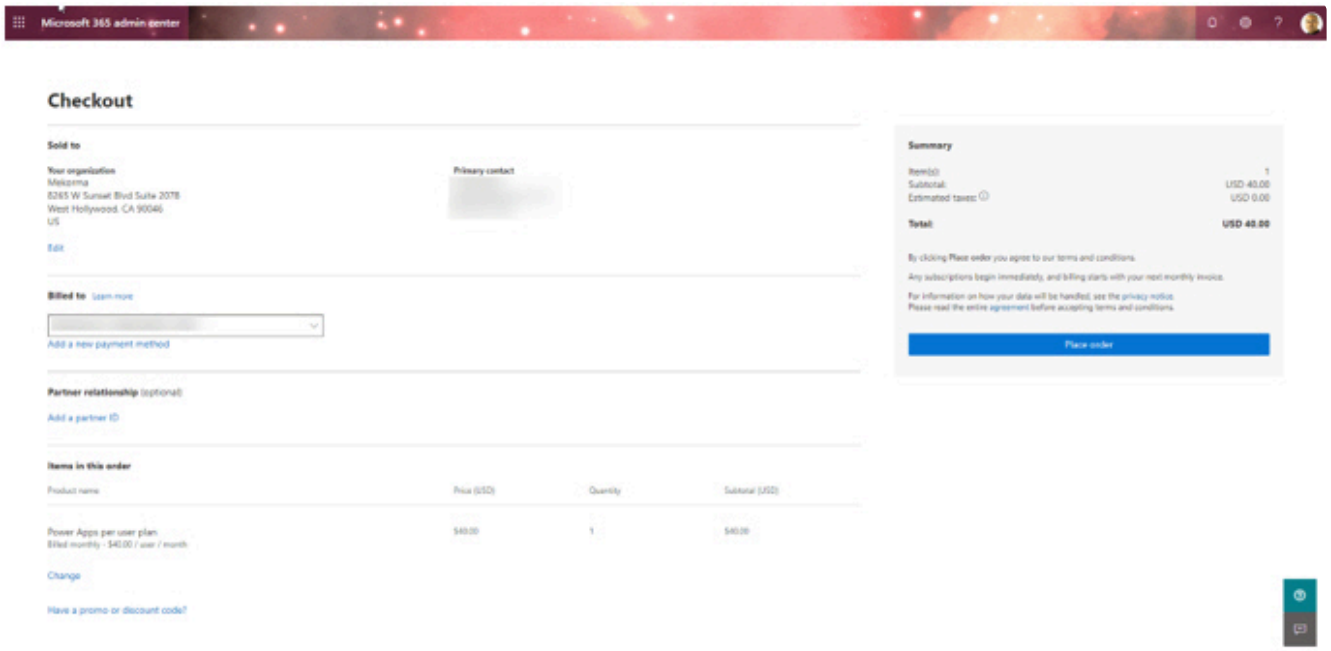

Purchasing a Power Apps per user plan will take you to the Office Portal.

5. If you want to acquire additional licenses, click the **Change** hyperlink under the Items in this order section.

Enter the new quantities to be purchased and click the **Check out now** button to continue.

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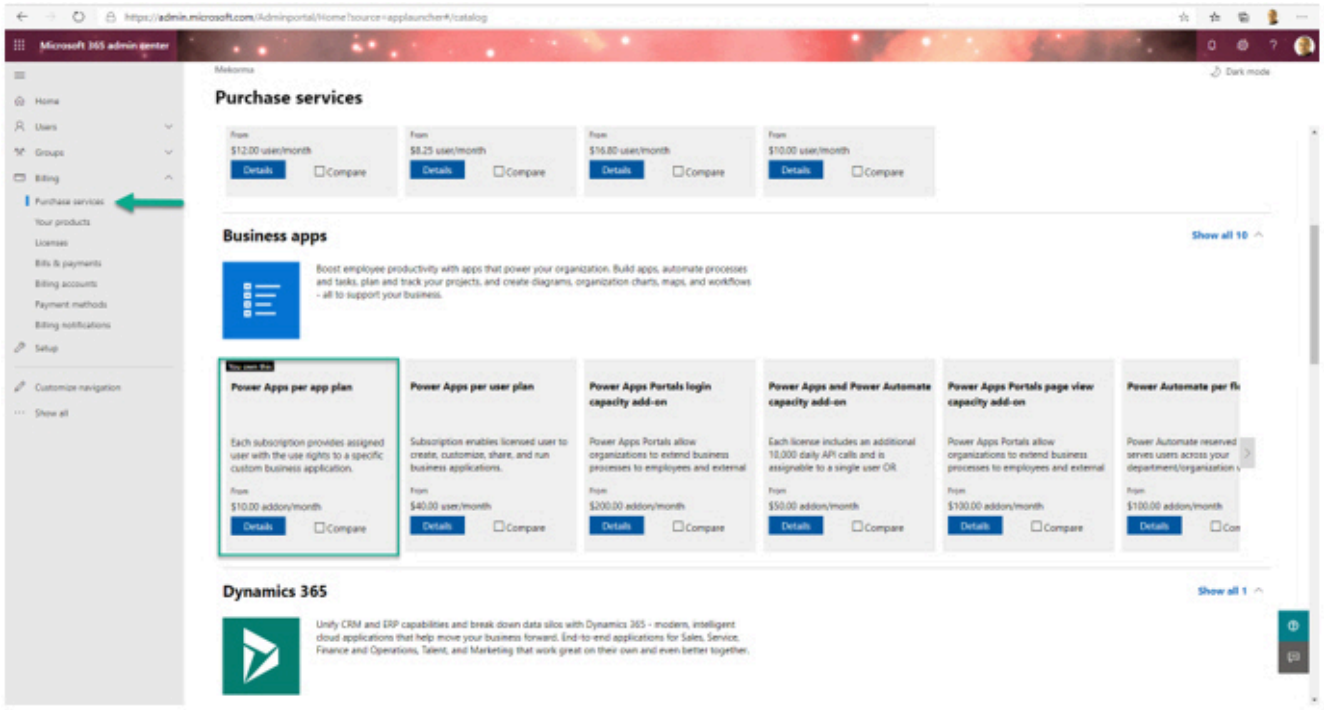
4.3. Purchasing Power Apps – Microsoft 365 Admin Center

If you are already a Microsoft 365 subscriber, you can use the Microsoft 365 Admin Center to procure your Power Apps licenses.

1. Open your browser (Chrome or Edge recommended) and log into https://admin.microsoft.com.
2. Expand **Billing** in the left-hand navigation pane and click on **Purchase services**.



3. Search or locate **Power Apps per app** plan.

> If you already own this plan, there will be an indicator letting you know so. Click on **Details** to manage this product to add or remove licenses accordingly.

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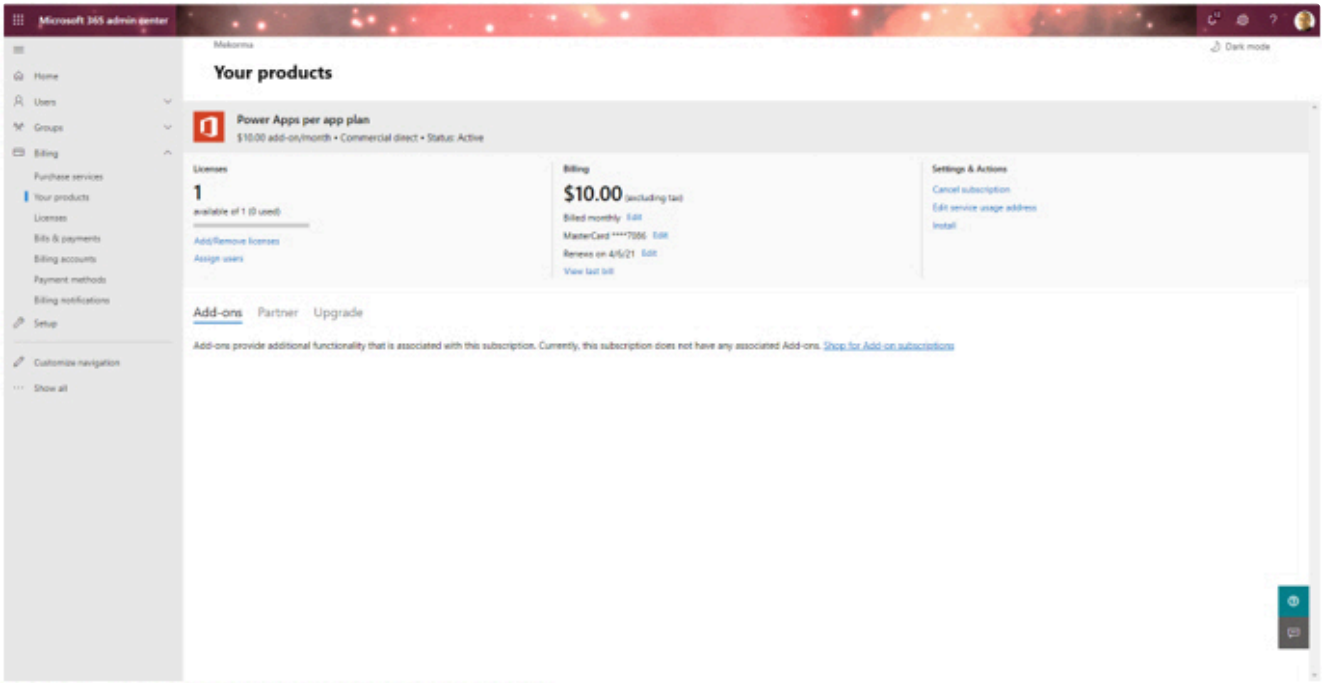

Figure 2 - Microsoft 365 admin center - Your Products

4. Follow all prompts leading up to the payment of the licenses. For Mekorma PowerApprovals, you must license any number of approvers who will be accessing the app, plus a license for the administrative user account.

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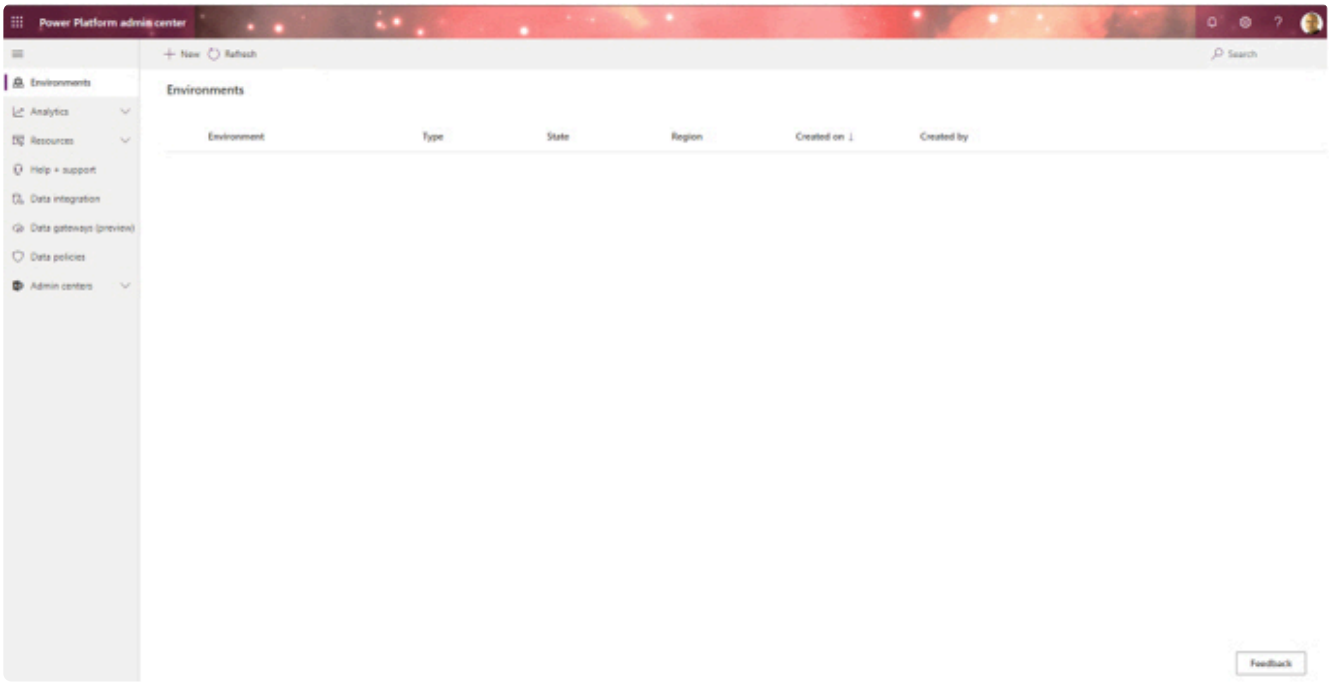
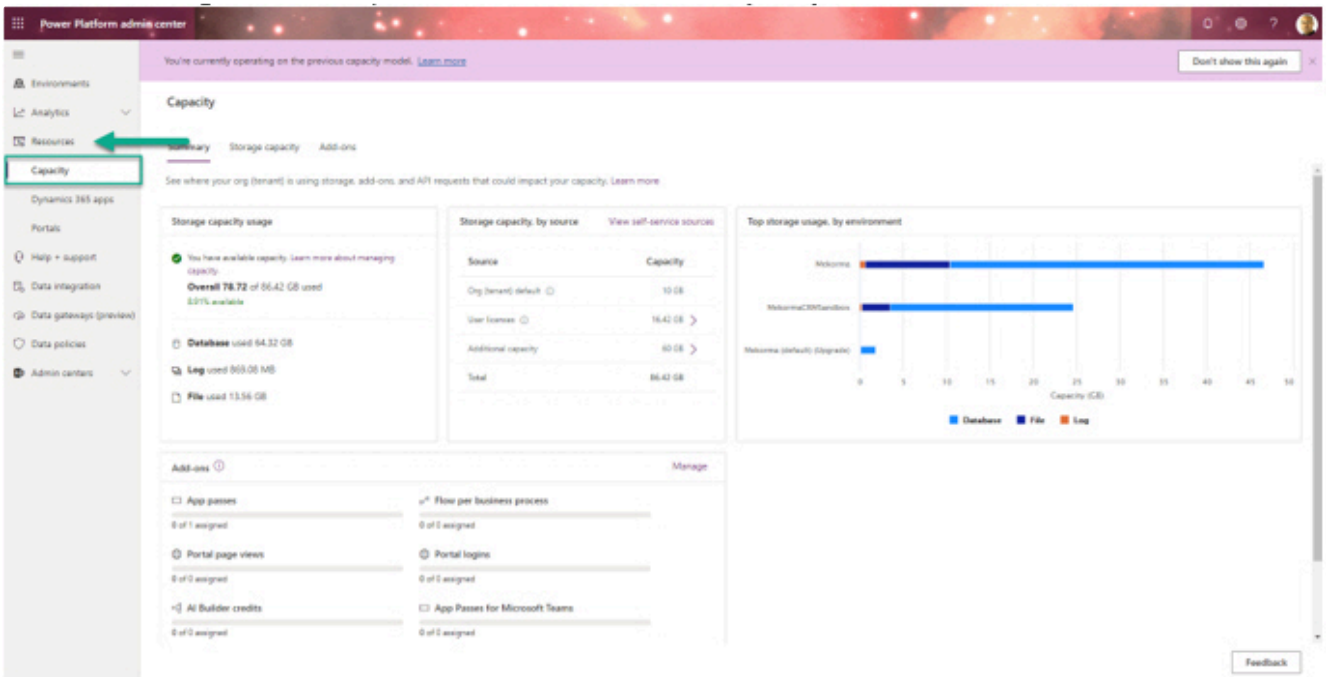
4.4. Assigning Approver User Licenses – Power Apps Per App Plan

To assign payment approver user licenses for the Power Apps per app plan, you will need to visit the Power Platform admin center.

1. Go to Power Platform Admin Center



2. In the left-hand navigation pane, expand **Resources** and select **Capacity**.



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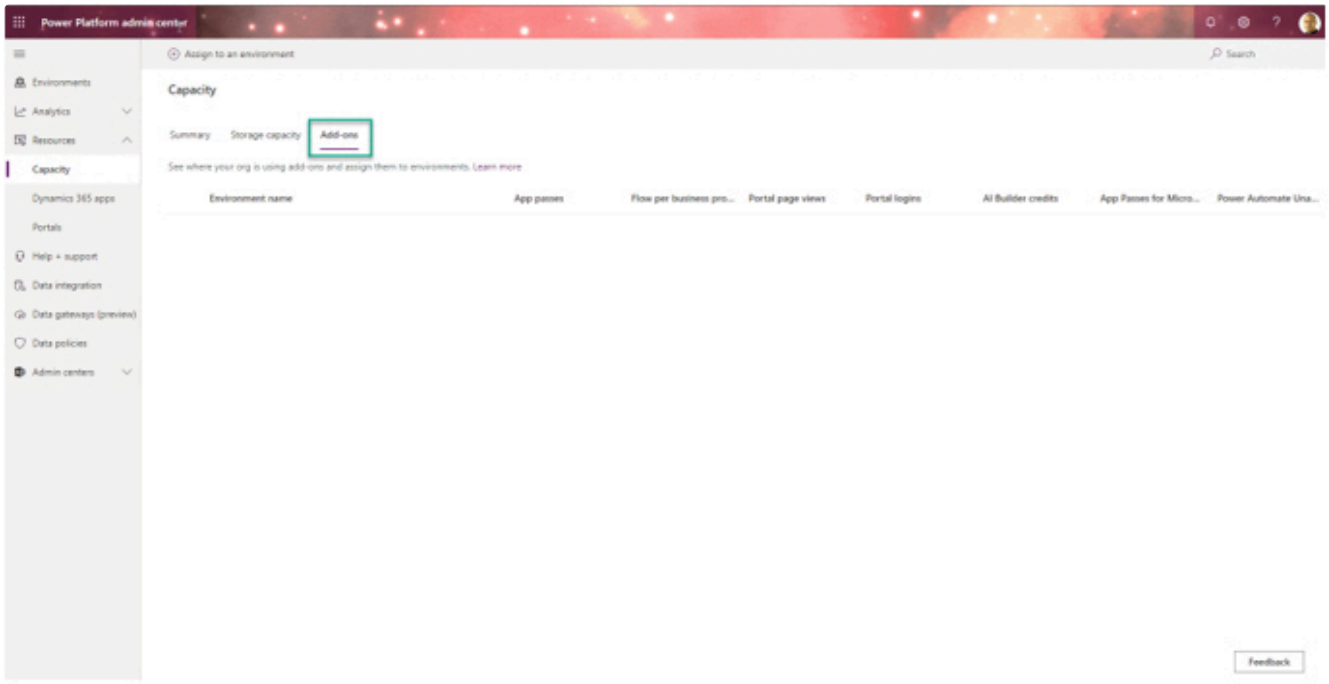
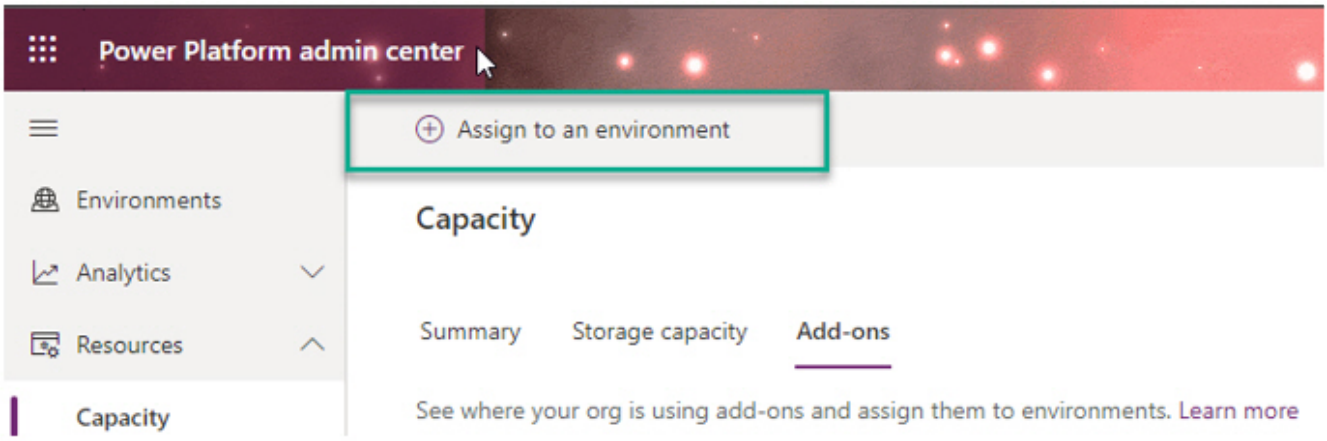
3. Click the **Add-ons** option on the **Capacity** page



This will enable the **Assign to an environment** option on the **Capacity** page toolbar.



4. Click on the **Assign to an environment** option.

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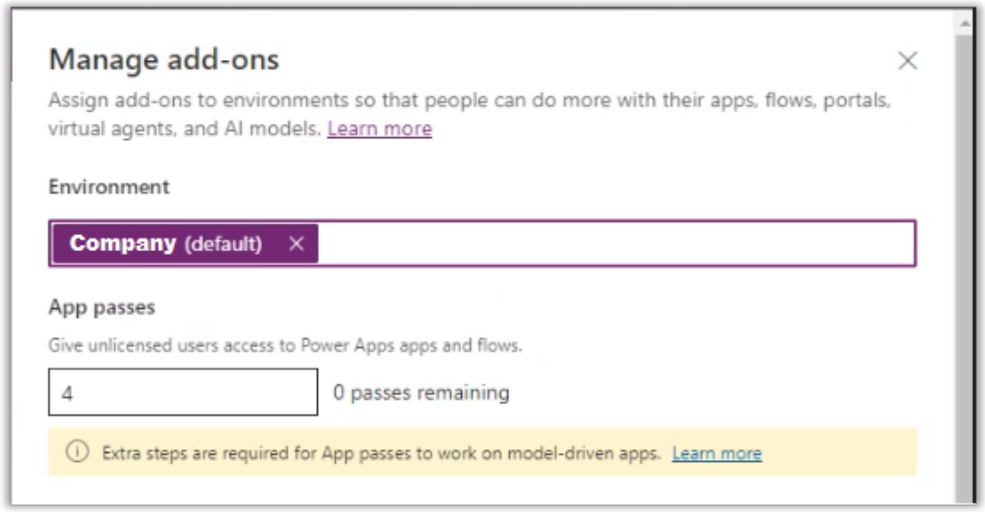

You are now presented with the **Manage add-ons** pane. In this pane, you can assign all licenses purchased by entering the quantity in the App passes field.

This plan requires users to initiate a 30-day Power Apps per user plan trial. By accepting the trial, you are now able to create a premium SQL Server connection to your on-premises Dynamics GP SQL Server. See Creating a connection to your on-premises SQL Server in your Power Apps environment.

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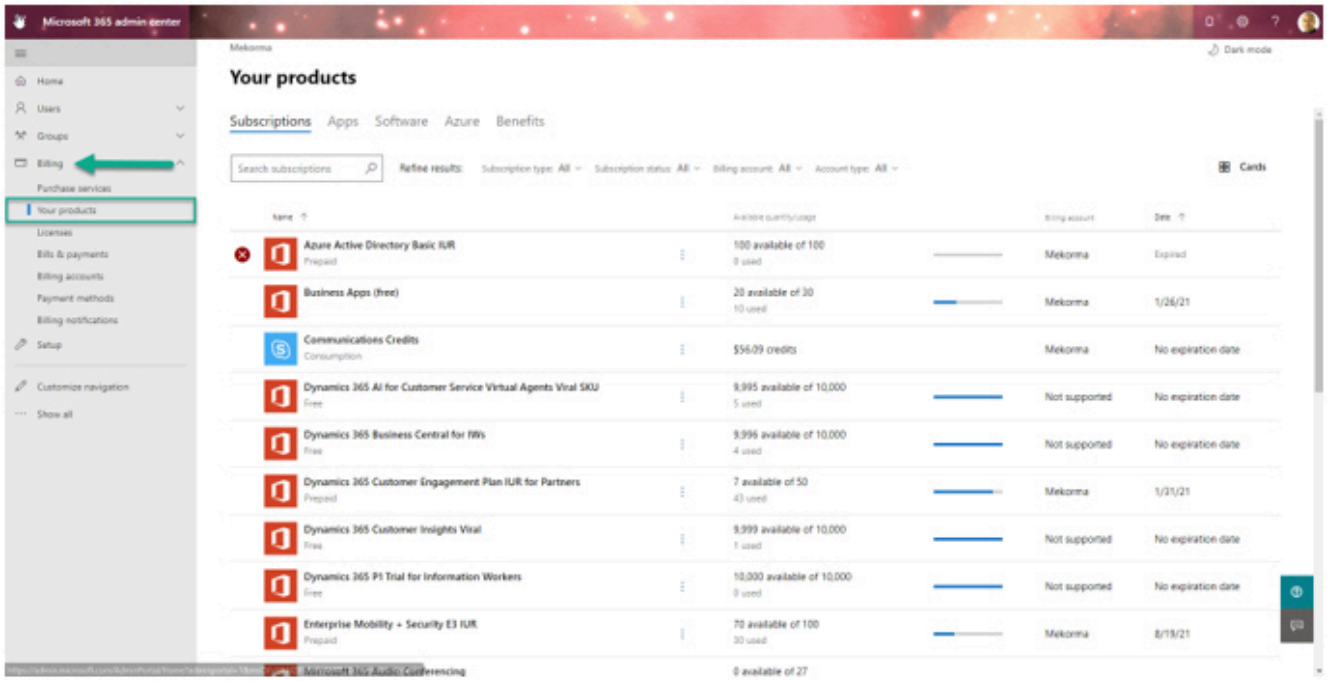
4.5. Assigning Approver User Licenses – Power Apps Per User Plan

You will need to assign user licenses to approvers and administrators. To assign user licenses, follow these steps via the Microsoft 365 admin center:

1. Open your browser (Chrome or Edge recommended) and log into https://admin.microsoft.com.
2. Expand **Billing** in the left-hand navigation pane and select **Your Products**.



3. Locate the Power Apps per user plan SKU.

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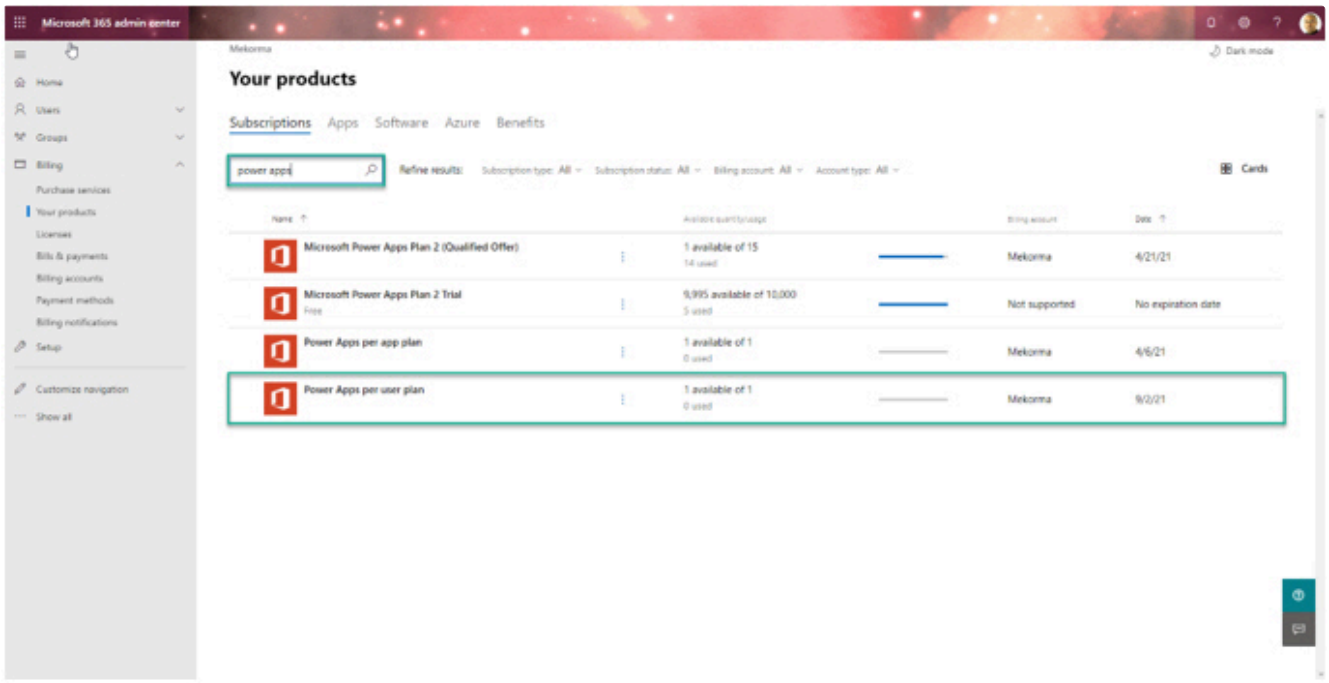
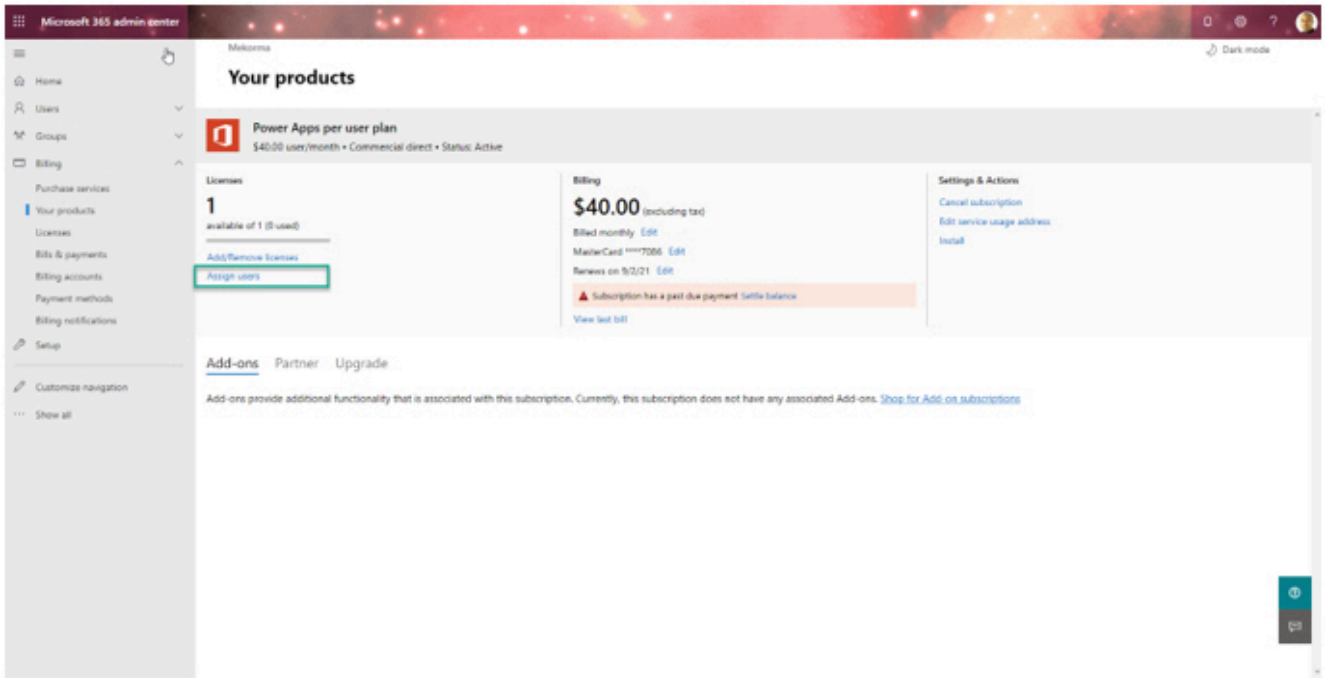


You can type “Power Apps” in the search bar to narrow the options.

4. Click on the **Assign Users** hyperlink to begin adding each approver user and environment administrator.



5. Proceed to enter each approver’s UPN. If you are an Office 365 subscriber, this will be the equivalent to the user email account.

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You must also add the designated Power Apps administrative account to the list of users being added.

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5. PowerApprovals Installation Prerequisites

This section details what you need to have in place *prior* to installing PowerApprovals.

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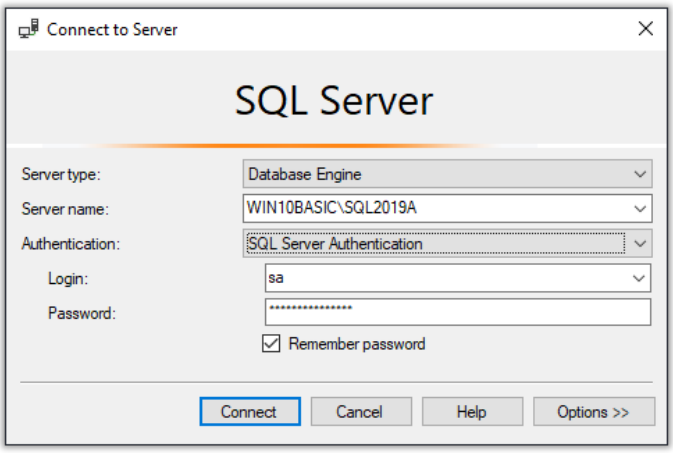
5.1. Setting up a SQL Server Proxy Login

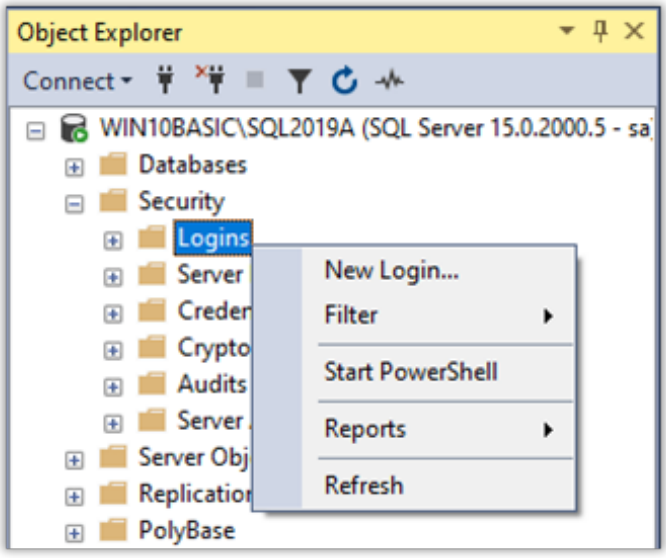
A SQL Server proxy login is a security principal, or entity that can be authenticated by Mekorma PowerApprovals via the SQL Server cloud connector to access Dynamics GP databases and run PowerApprovals server-side business logic. You can create a login based on a Windows principal (such as a domain user) or you can create a native SQL Server login.

If you are going to use a domain account as your PowerApprovals proxy account, contact your system administrator. Mekorma recommends setting up an identifiable account, such as *domain\PowerApprovalsProxy*. To create a SQL Server login for Mekorma PowerApprovals, follow these steps:

1. Launch Microsoft SQL Server Management Studio and log in as the ‘sa’ user.



2. In Object Explorer, expand the folder of the server instance in which you want to create the new login.
3. Expand the Security folder. Right-click on *Logins* and choose *New Login*.



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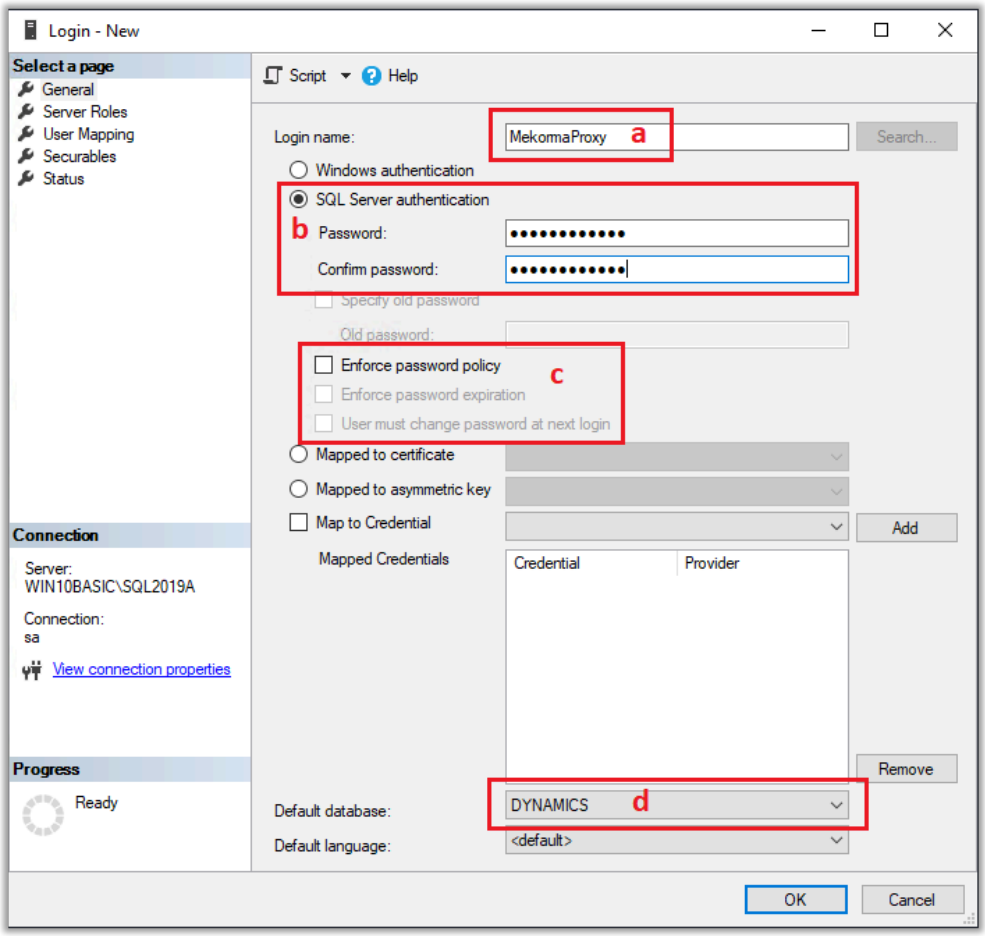
4. Create the user as shown below.



   a. Login Name = MekormaProxy
   b. Mark *SQL Server authentication*
   c. Unmark *Enforce password policy*
   d. Default database = DYNAMICS
5. In the left-hand navigation pane, navigate to *User Mapping*.
6. The proxy user must have access to Dynamics GP's system database.
   - Mark the system company. Typically, this is **DYNAMICS**, but it may be named something else.
   - In the lower section, Database Role Membership, mark **DYNGRP**.

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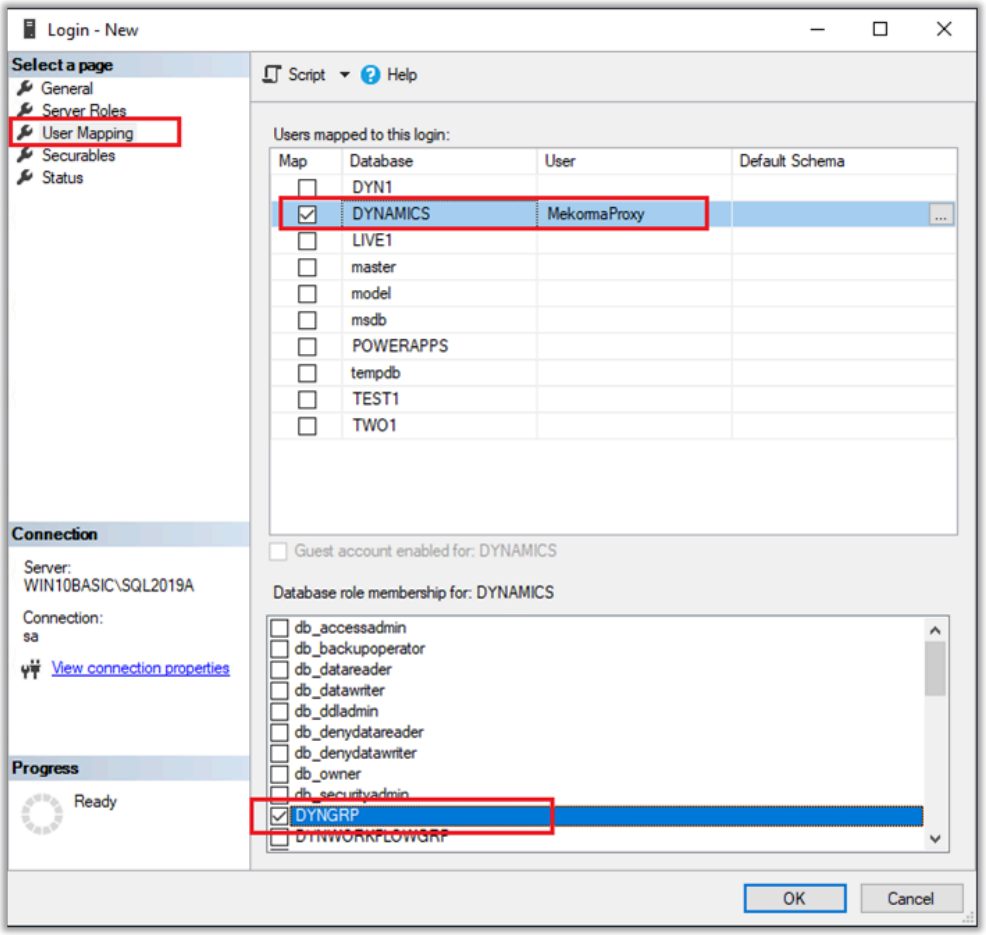

7. Repeat steps 1-6 for each company that will use Mekorma Power Apps.
    - Mark the company database
    - Mark the DYNGRP role
8. Once complete, you should have something similar to the screenshot below:

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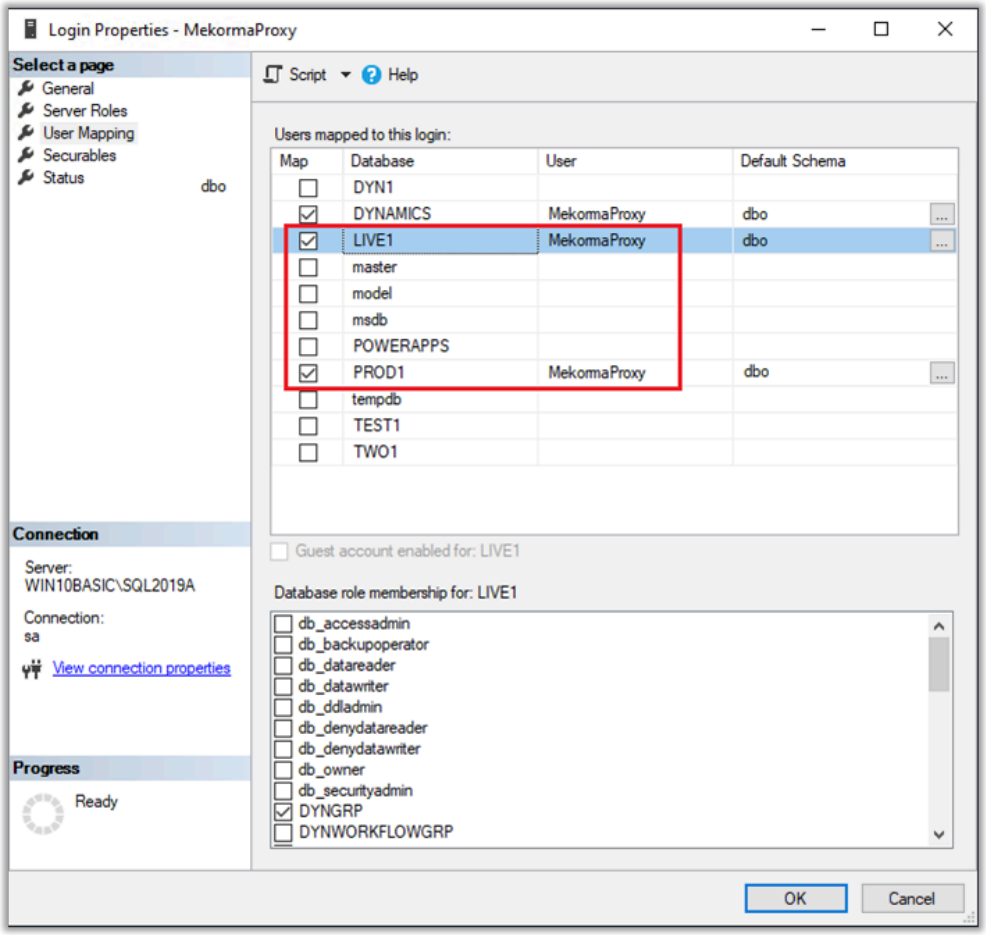

9. In the example above, we have many Dynamics GP companies; however, we are restricting access to only the LIVE1 and PROD1 companies. These are the two companies that will be using the Mekorma Power Apps product(s).
10. Click **OK** to complete the process.

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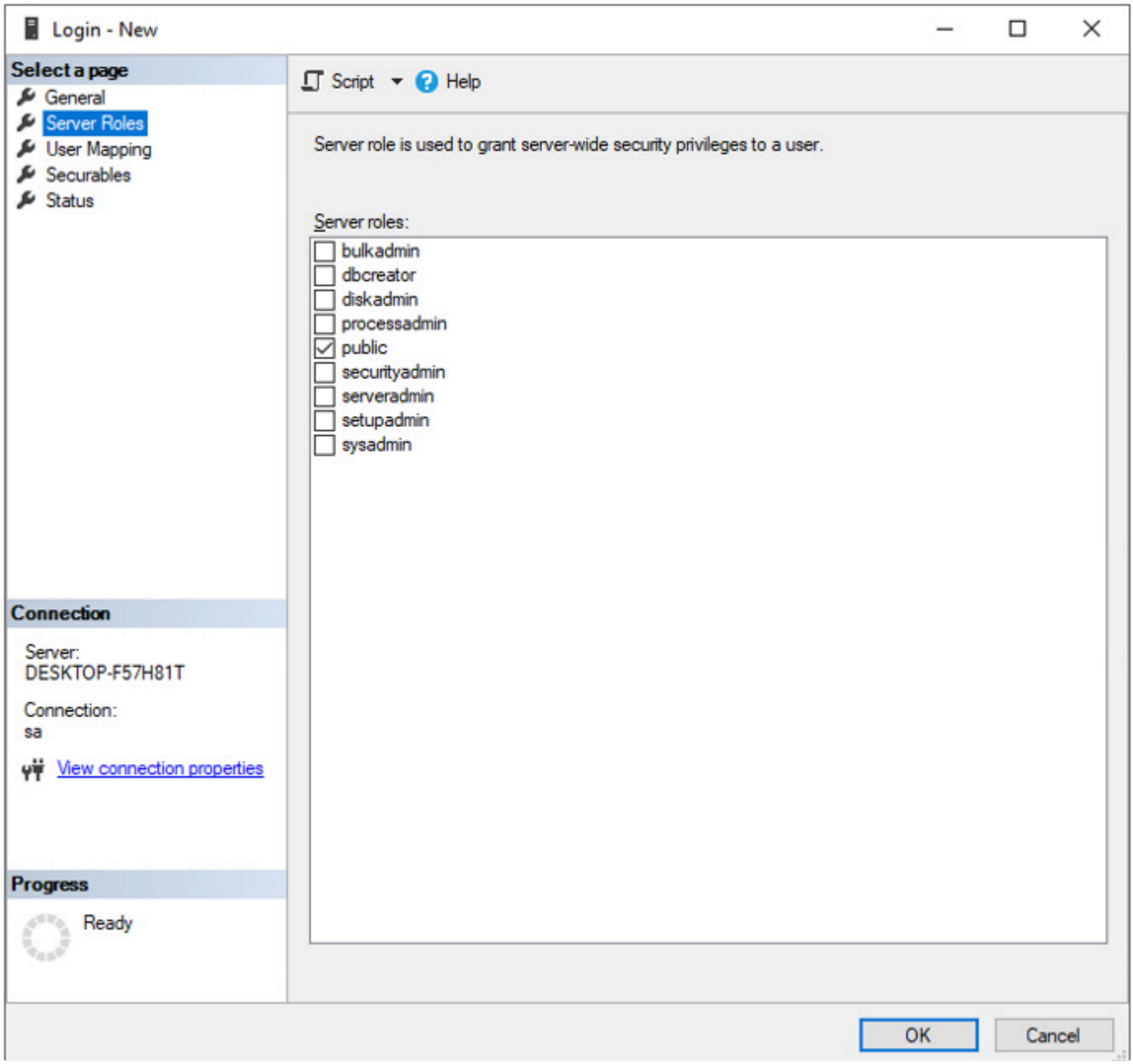
5.1.1. Define Server Roles for SQL Server Proxy Login

The PowerApprovals SQL Server proxy login does not require any special server roles. The default selection is **public**.



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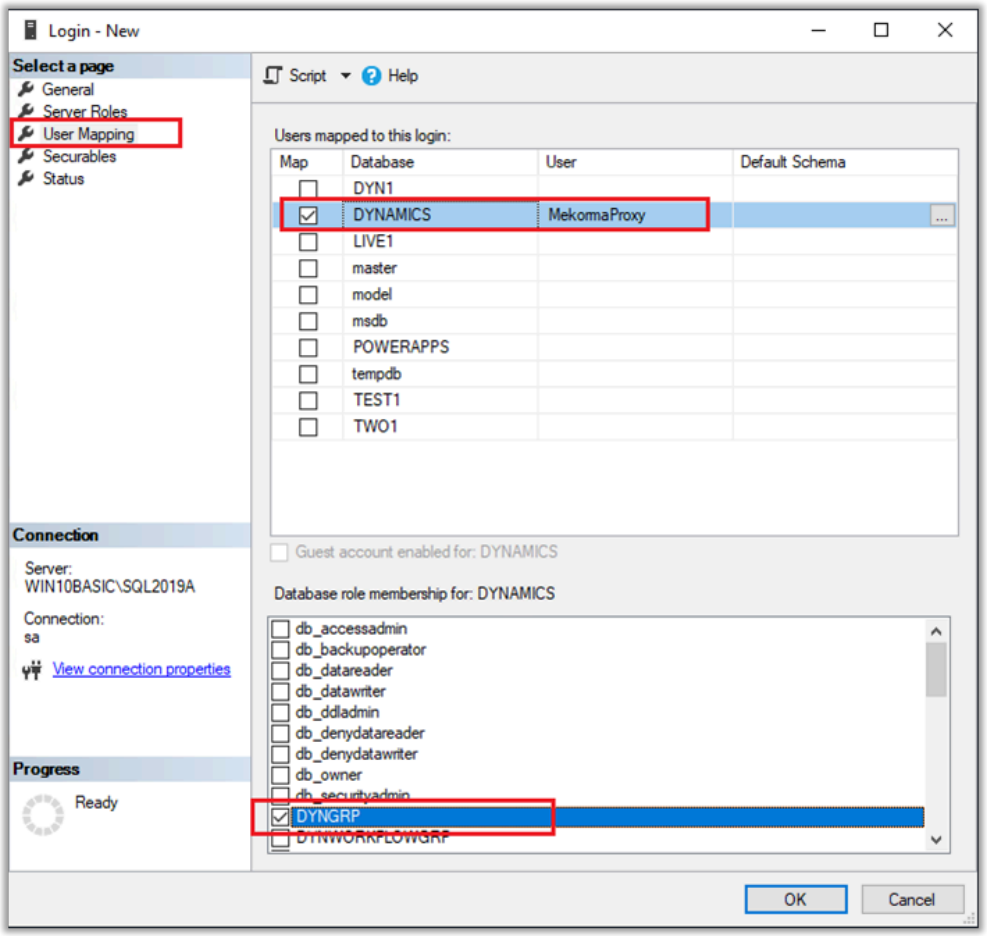
5.1.2. Mapping Company Access

Proxy users must have access to Dynamics GP's system database, as well as all company databases that will use the Mekorma Power Apps products. The instructions below show you how to grant access to all pertinent databases.

1. Click *User Mapping*.
2. The proxy user must have access to Dynamics GP's system database.
    - Mark the system company that aligns with your system settings. Generally, this defaults to **DYNAMICS**.
    - In the lower section, Database Role Membership, mark **DYNGRP**.



3. Repeat these steps for each company that will use Mekorma Power Apps:
    - Mark the company database
    - Mark the DYNGRP role
4. Once you are done, you should have something similar to the screenshot below:

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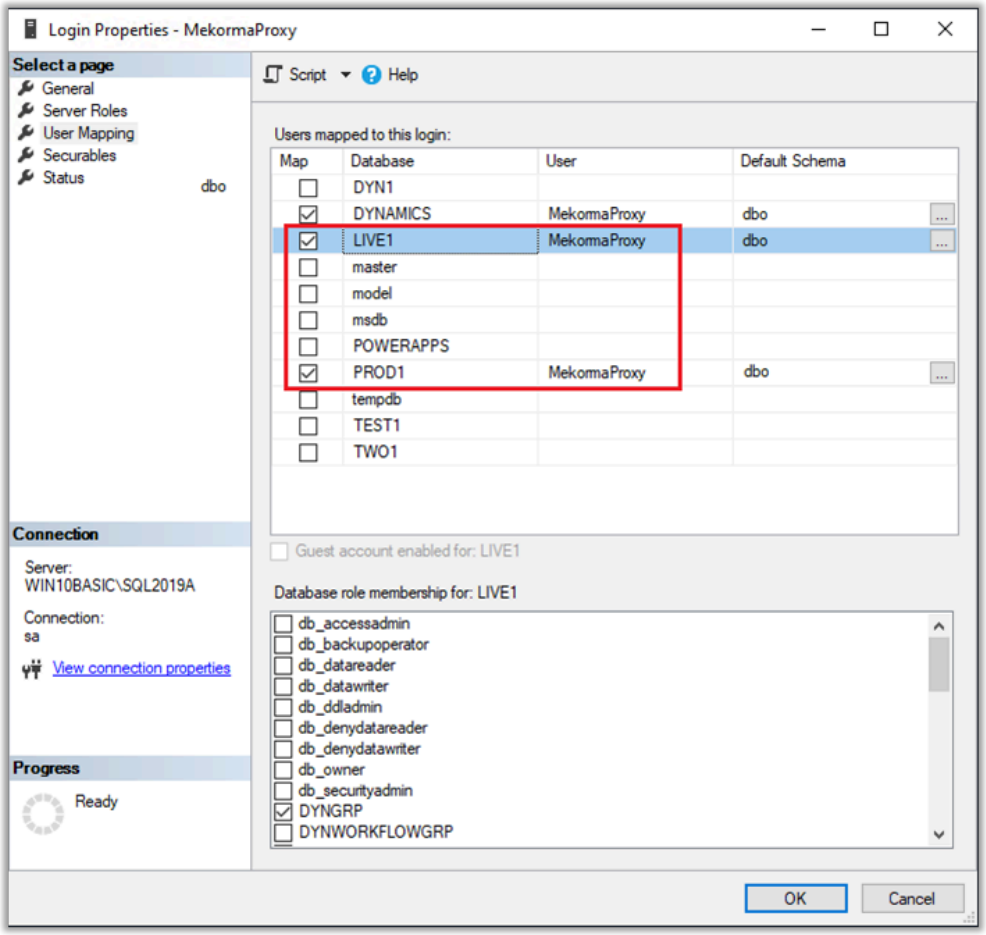

5. In the example above, we have many Dynamics GP companies; however, we are restricting access to only the LIVE1 and PROD1 companies. These are the two companies that will be using the Mekorma Power Apps product(s).
6. Click **OK** to complete the process.

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6. Installing Microsoft On-Premises Data Gateway

The on-premises data gateway is software that you install in an on-premises network. The gateway facilitates access to the Dynamics GP SQL Server on your network.

You must install the data gateway in standard mode. In that mode, you can install a standalone gateway or add a gateway to a cluster, which we recommend for high availability scenarios.

In this section, we show you how to install a standard gateway and how to add another gateway to create a cluster.

The on-premises data gateway software can be installed, “on any server or machine with a direct line of sight to your Dynamics GP SQL Server”, as per Microsoft documentation. This means that you can install the gateway on any computer on your network and not necessarily on your Dynamics GP SQL Server machine.

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6.1. System Requirements and Considerations

Minimum requirements

- .NET Framework 4.7.2 (Gateway release December 2020 and earlier)
- .NET Framework 4.8 (Gateway release February 2021 and later)
- A 64-bit version of Windows 10 or a 64-bit version of Windows Server 2012 R2 with current TLS 1.2 and cipher suites
- 4 GB disk space for performance monitoring logs (in default configuration)

Recommended

- An 8-core CPU
- 8 GB of memory
- A 64-bit version of Windows Server 2012 R2 or later
- SSD storage for spooling

Related considerations

- Gateways aren’t supported on Server Core installations.
- The user installing the gateway must be the admin of the gateway.
- The gateway can’t be installed on a domain controller.
- The common practice of On-Premises Data Gateway installation is on the GP SQL Server.
- If you’re planning to use Windows authentication, make sure you install the gateway on a computer that’s a member of the same Active Directory environment as your SQL Server.
- Don’t install a gateway on a computer, such as a laptop, that might be turned off, asleep, or disconnected from the internet. The gateway can’t run under any of those circumstances.
- If a gateway uses a wireless network, its performance might suffer.
- You can install other applications on the gateway machine, but this may degrade gateway performance. If you do install other applications on the gateway machine, be sure to monitor the gateway closely to check if there is any resource contention.
- You can install up to two gateways on a single computer: one running in personal mode and the other running in standard mode. You cannot have more than one gateway running in the same mode on the same computer.

Review the full list of requirements here.

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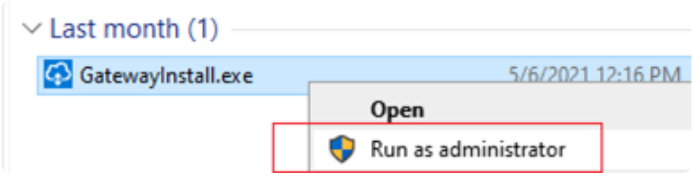
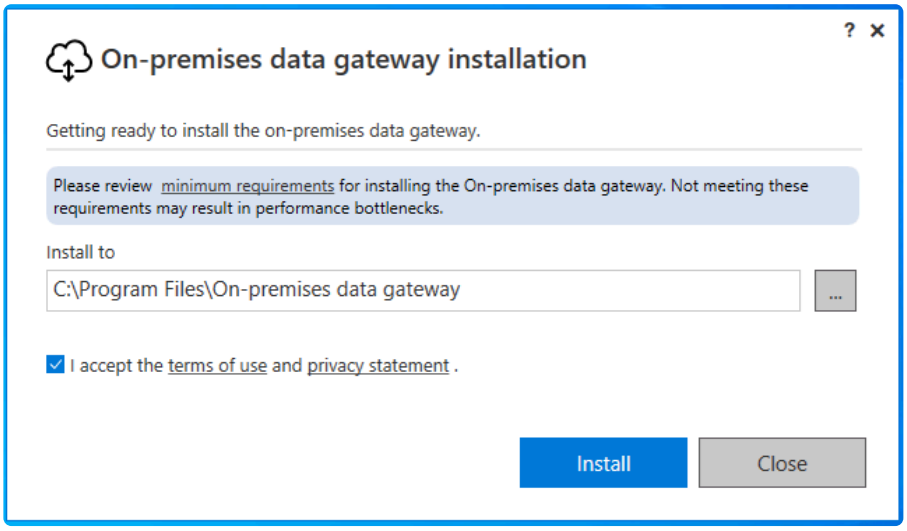
6.2. Download and Install a Standard Gateway

The on-premises data gateway must be online 24/7 and installed on a network computer that is always running. For optimal performance and reliability, Mekorma recommends that a wired network be used in lieu of a wireless connection.

1. On the machine where you want to host the on-premises data gateway, download the installer from Microsoft, here.
2. Run the installer in administrator mode.



3. In the gateway installer, keep the default installation path, accept the terms of use, and click **Install**.



4. Enter the User Principal Name (UPN) or email address for your Office 365 organization account, and then select **Sign in**.

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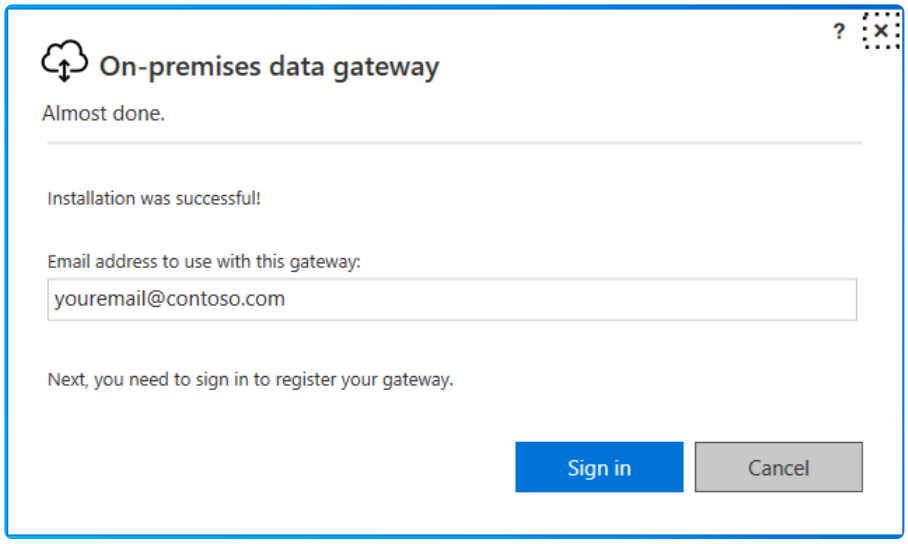
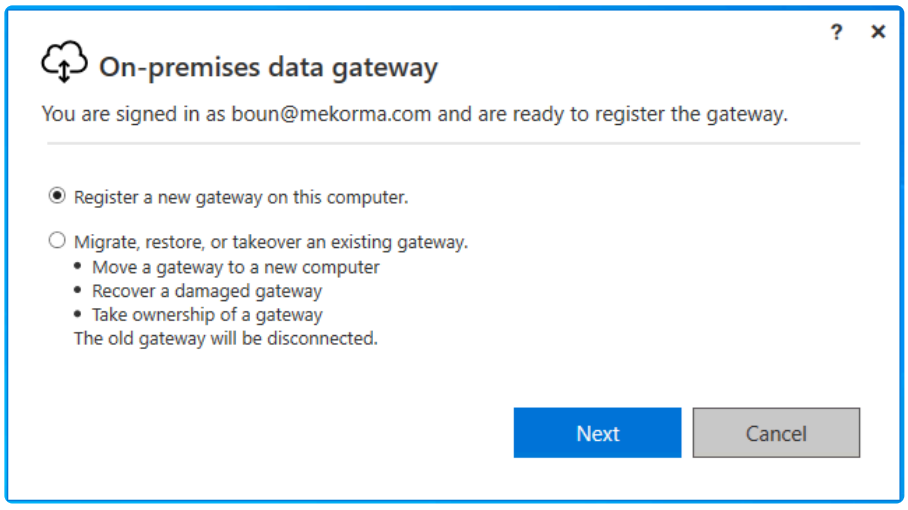


You need to sign in with either a work account or a school account. This account is an organization account. If you signed up for Office 365 and didn't supply your work email address, your address might look like nancy@contoso.onmicrosoft.com. Your account is stored within a tenant in Azure AD. In most cases, your Azure AD account's UPN will match the email address.

The gateway is now associated with your UPN or Office 365 organization account and you are signed in. Manage gateways from within the associated service.

5. Select *Register a new gateway on this computer* and click **Next**.



6. Enter a name for the gateway and create a recovery key. Select **Configure** to continue.

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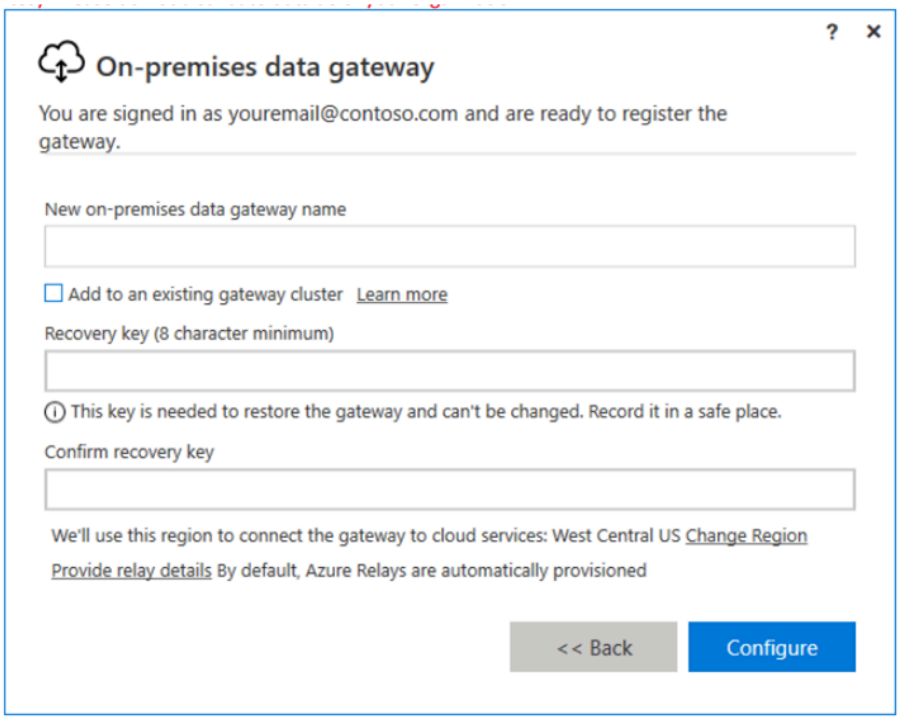

Gateway Name	We recommend naming your gateway with the format XYZ_DataGateway where XYZ is acronym for your company. • E.g., MEK_DataGateWay
Recovery Key	We recommend using a strong password for the recovery. • Do not forget this password. Store it somewhere safe. • The key is needed when moving the gateway to a different server or creating a cluster of gateways.

If you are a Power BI customer for sovereign clouds, Microsoft currently only supports installing gateways in the default Power BI region of your tenant. The region picker on the installer is only supported for Public cloud. Finally, you can also provide your own Azure Relay details. For more information about how to change the Azure Relay details, see Set the Azure Relay for on-premises data gateway.

7. Review the information in the status window. This example uses the same account for Power BI, Power Apps, and Power Automate, thus the gateway is available for all three services.

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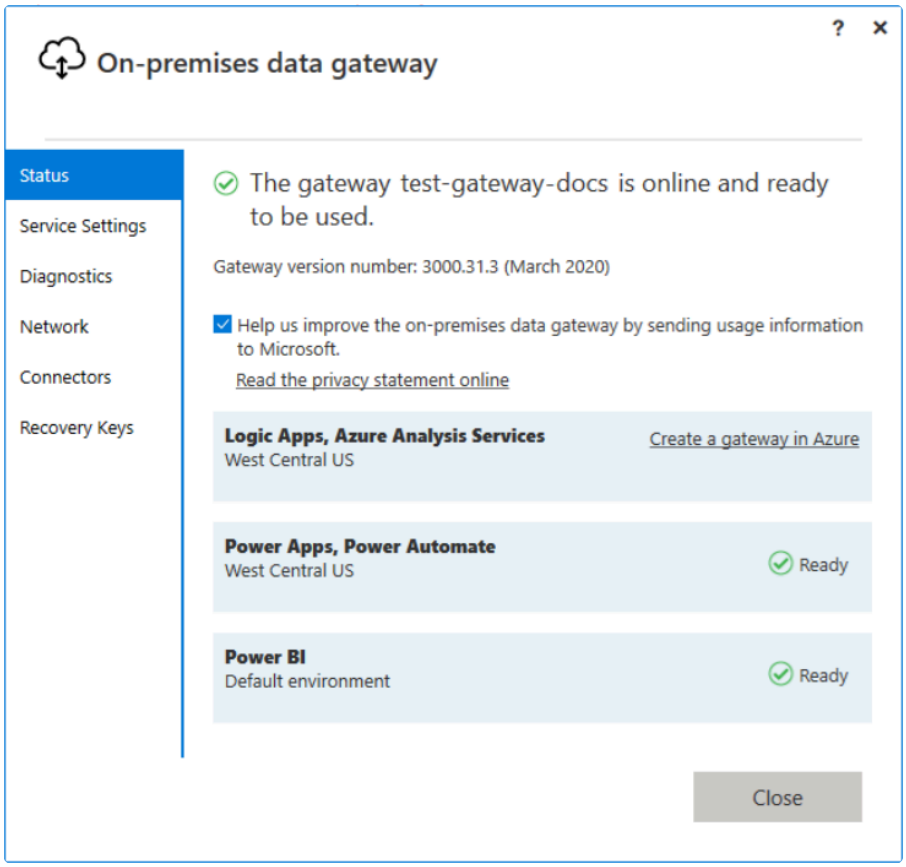

Note the gateway region—the example above shows *West Central US* as the region with the best connectivity.

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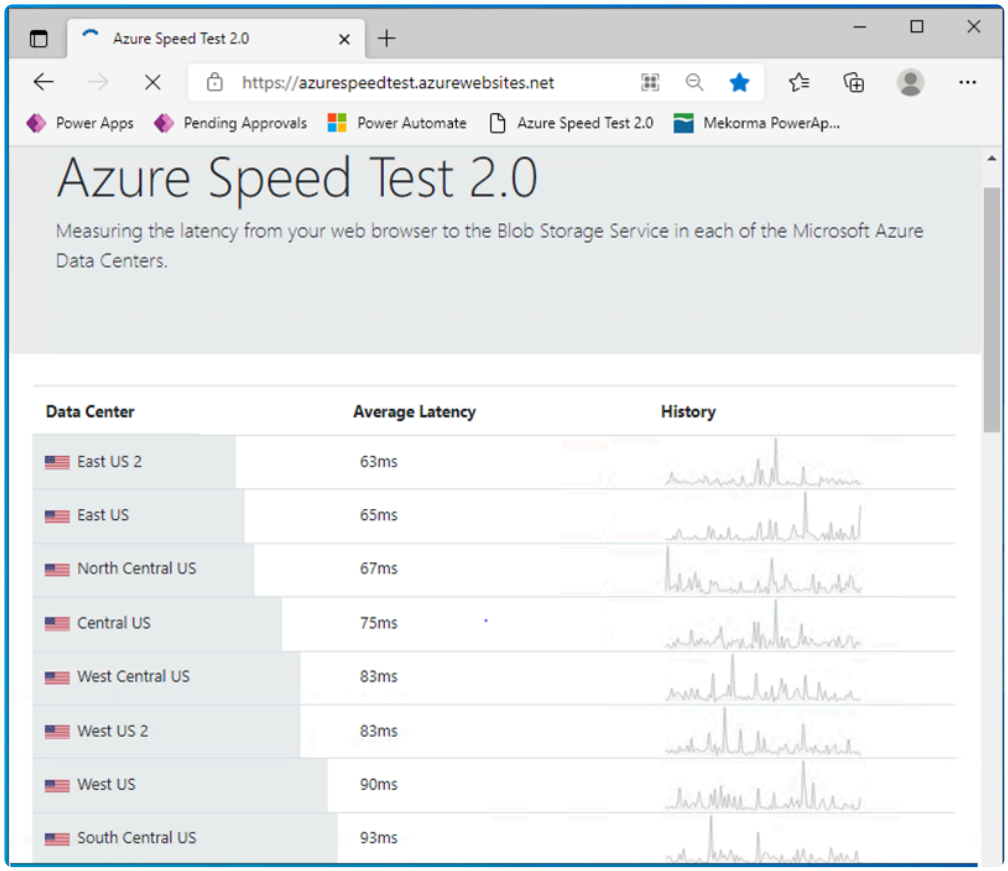
6.2.1. Latency Testing

To ensure that your access to the gateway is an acceptable speed, it’s necessary to run a latency test. A good latency range is typically between 20-60ms, but anything up to 100ms is acceptable. To perform a latency test, open any internet browser on the machine that is hosting the on-premises gateway and run the Azure Speed Test 2.0.



Observe the average latency for your region. In this example, the latency is 83ms for West Central US.

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6.3. Add Another Gateway to Create a Cluster

A cluster lets gateway admins avoid having a single point of failure for on-premises data access. If the primary gateway is unavailable, data requests are routed to the second gateway that you add, and so on.

Because you can install only one standard gateway on a computer, you must install each additional gateway in the cluster on a different computer. This provides redundancy in the cluster in case of an emergency.

> Offline gateway members within a cluster will negatively impact performance. These members should either be removed or disabled. Ensure the gateway members in a cluster are running the same gateway version, as different versions may cause unexpected failures based on supported functionality.

To create high-availability gateway clusters, you need the November 2017 or later update to the gateway software.

1. Download the gateway to a different computer and install it.
2. Sign in with your UPN or Office 365 organization account and register the gateway. Select *Add to an existing cluster*. In the **Available gateway clusters** list, select the primary gateway, which is the first gateway you installed. Enter the recovery key for that gateway. Select **Configure** to finish the installation process.

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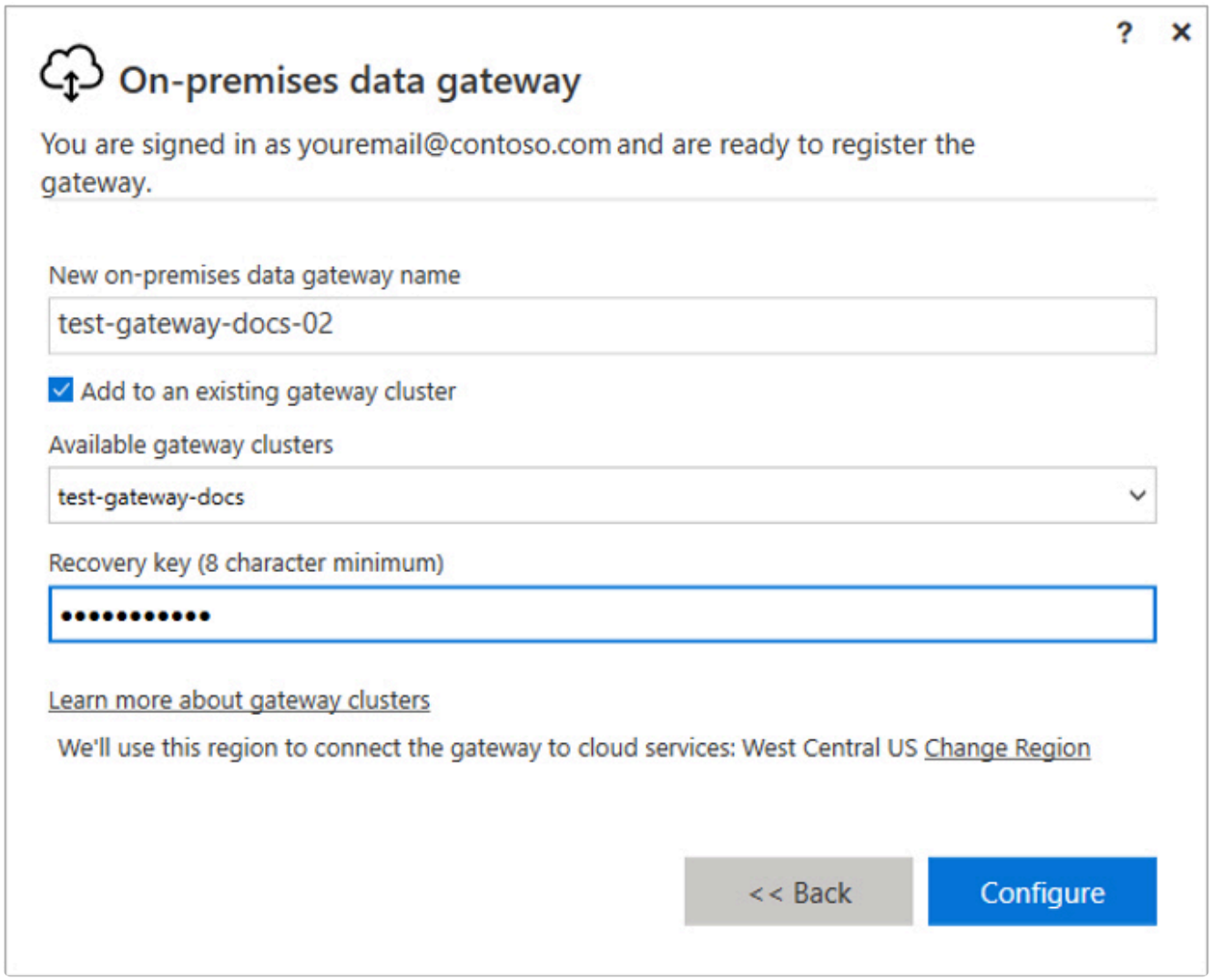

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7. Creating a Connection to Your On-Premises SQL Server in Your Power Apps Environment

The SQL Server connector allows Mekorma applications such as PowerApprovals and Invoice Capture to communicate with the Dynamics GP database via the on-premises data gateway.

The SQL connector can be used for both PowerApprovals and Invoice Capture simultaneously. For example, the connector created for PowerApprovals can be shared to the Invoice Capture's service account user (e.g., svc_invoice@mycompany.com). Likewise, the Invoice Capture SQL connector can be shared to the PowerApprovals service account user (svc_powerapprovals@mycompany.com).

The mail connector is only used by PowerApprovals—allows PowerApprovals the ability to send email notifications to the batch approval requester.

Prerequisites

Gather all credential information that you will need before you start.

Item	Data
SQL Server Instance Name	ServerName\SQLServerName
Dynamics GP Database	DYNAMICS
SQL Proxy Username and Password	MekormaProxy
Data Gateway Name	XYZ_DataGateway (where XYZ is the acronym of your company)
Service Account User	One of the following (depending on the Mekorma product you are using) • svc_powerapprovals@mycomany.com • svc_invoice@mycompany.com

Setup Steps

1. Open your browser in private/incognito mode so that it does not cache your credentials and prevents the browser from automatically logging in with any cached accounts. Edge, Chrome, or Firefox are acceptable; **do not** use Internet Explorer.
2. Go to Power Apps studio.
3. If you have multiple environments, be sure to select the correct environment (as shown

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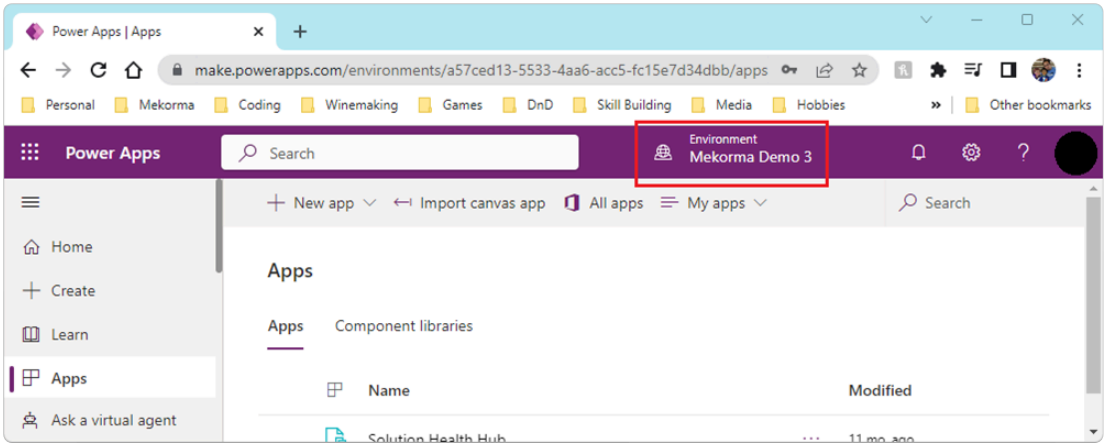
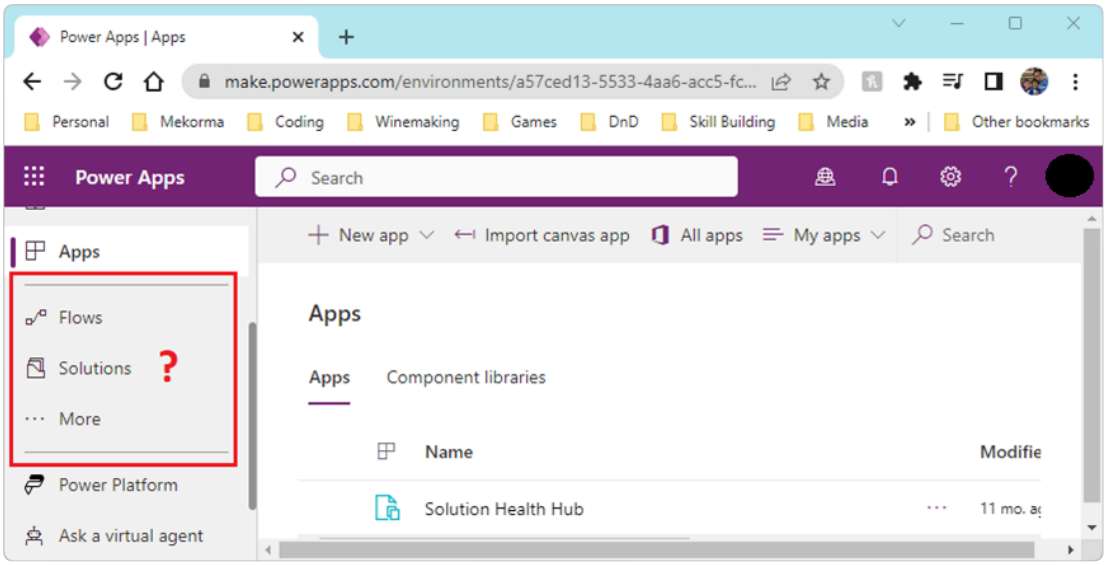
below).



4. Verify that **Connections** and **Gateways** appear under Apps. If they do, proceed to step 5; otherwise, follow the steps below to pin them.



   a. Pin **Connections** by clicking on *More* and scrolling to find **Connections**. Use the pin icon to add it to the navigation pane.

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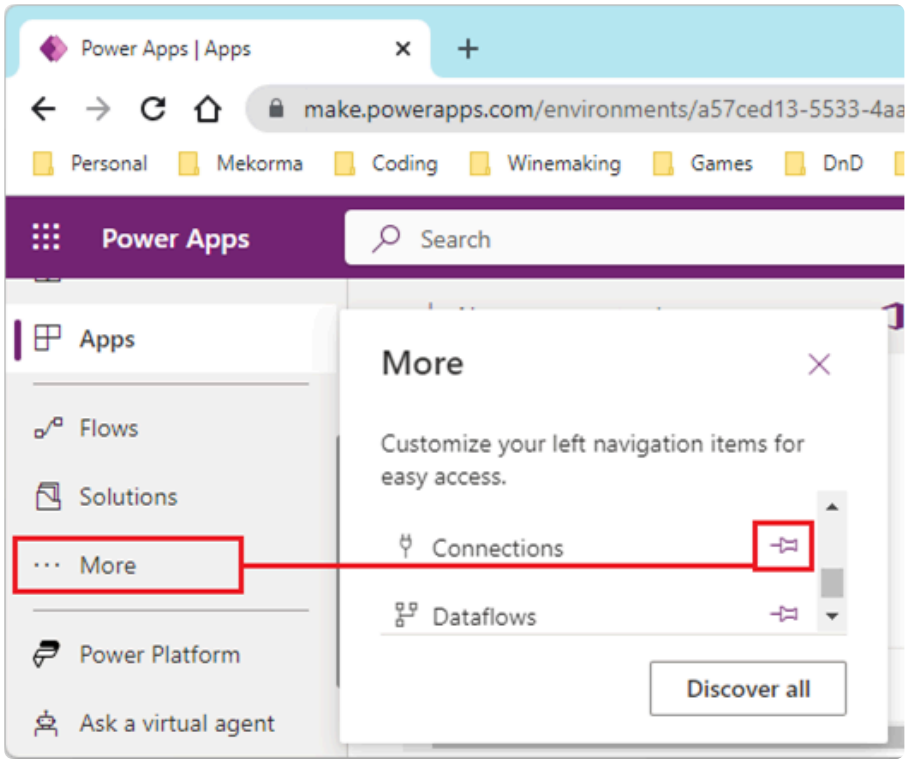
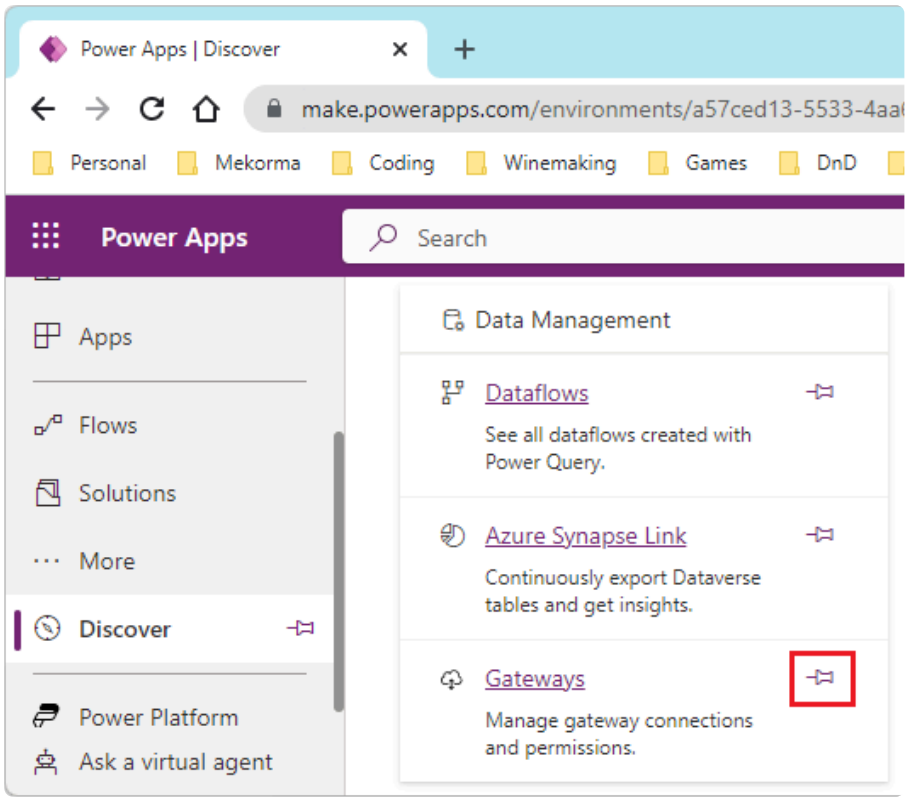


b. Pin **Gateways** by clicking *More* and then *Discover all*. Next, open **Data Management** and locate **Gateways**. Use the pin icon to add it to the navigation pane.



5. Click *Connections* and then *+ New Connection*.

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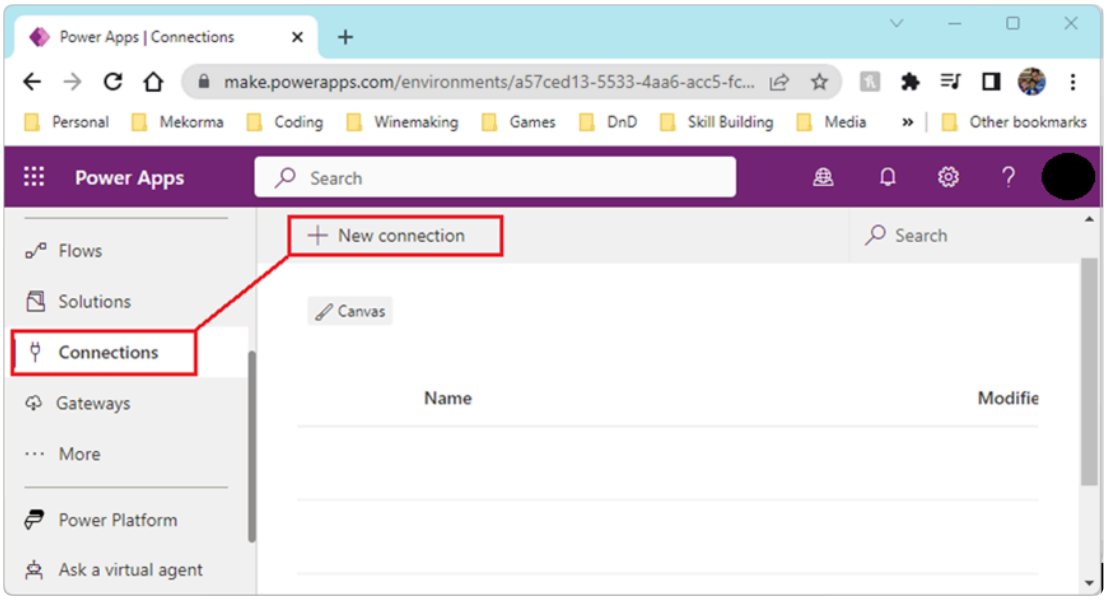
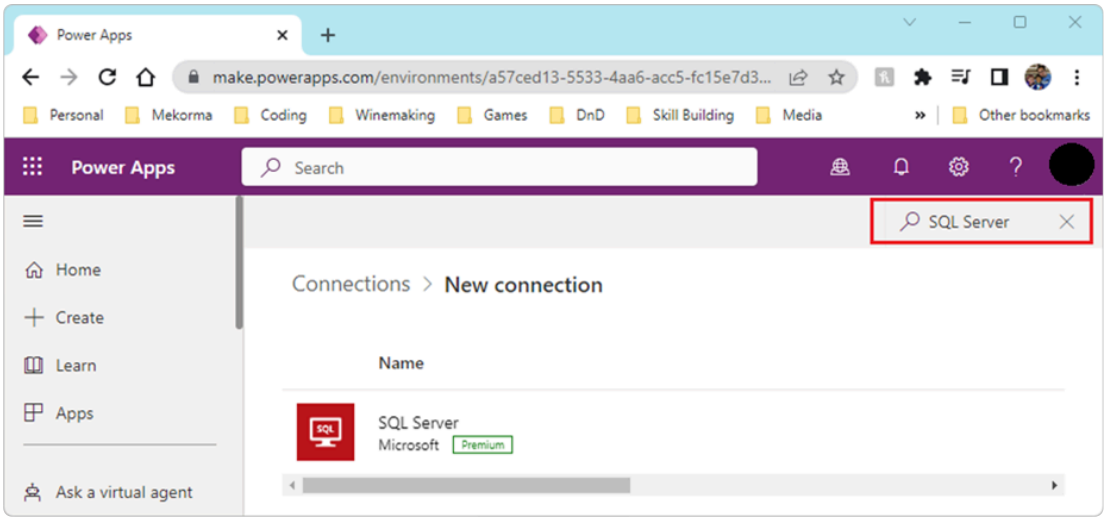


6. Locate the SQL Server premium connector (by Microsoft) in the list of connectors. If you can't find it, use the search (as shown below). Click on the SQL Server connector.



7. Enter login credentials as shown below.

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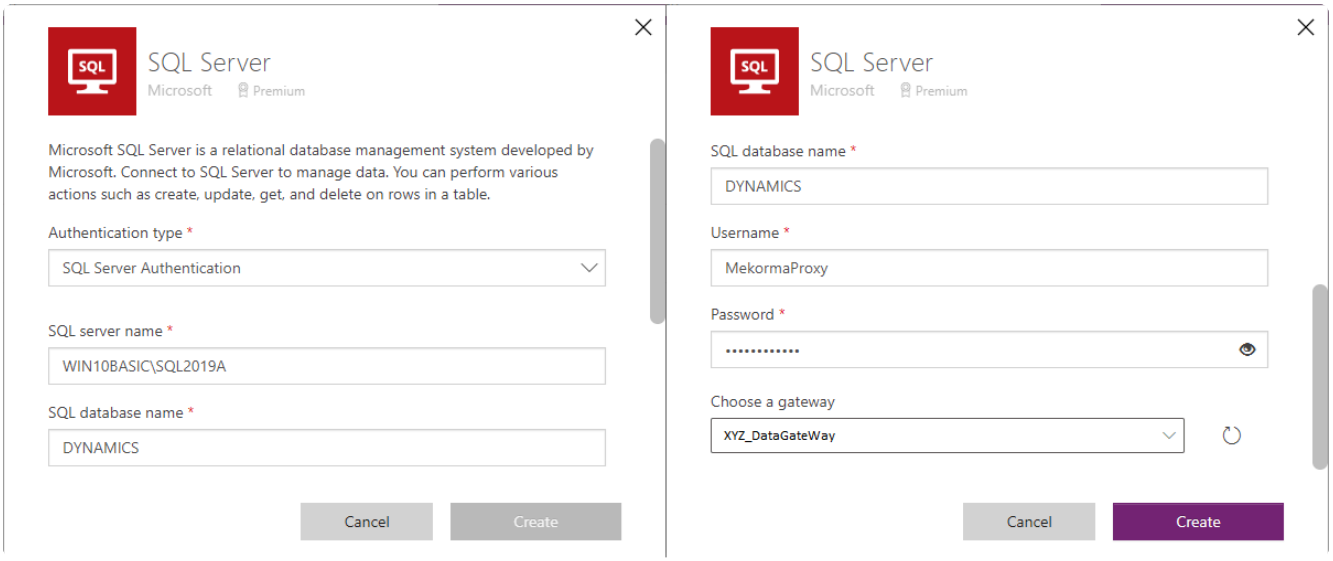

- Authentication type: Set to *SQL Server Authentication*.
- SQL server name: This is the name of the server machine that is hosting your on-premises date gateway.
- SQL database name: This is *DYNAMICS*. If you changed the Dynamics GP system database name, enter the updated database name here.
- Username: Enter the SQL proxy user that was created in the previous section. Typically, this is *MekormaProxy*.
- Password: Enter your password.
- Choose a gateway: Pick the gateway that you set up previously. This is typically XYZ_DataGateWay, where XYZ is the acronym of your company.

8. Click *Create* to finish the setup.

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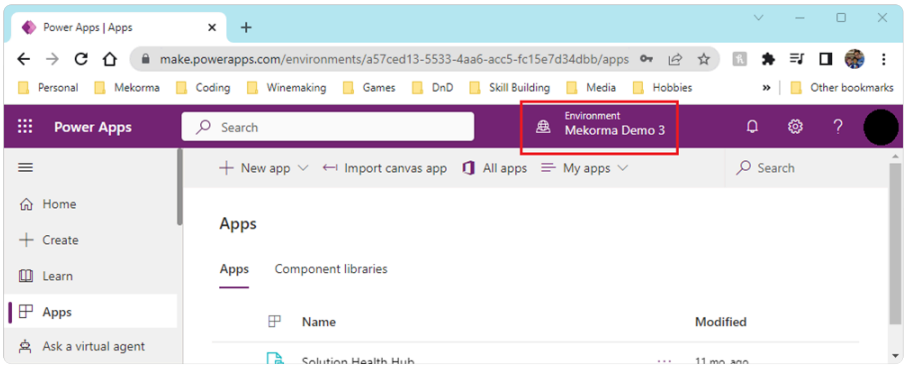
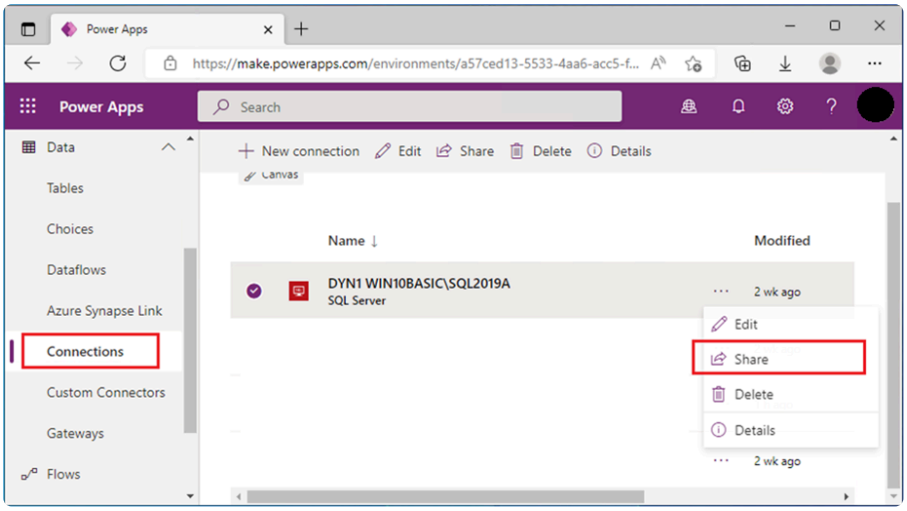
7.1. Sharing the SQL Connector

The SQL connector can be used simultaneously by multiple apps or solutions. For example, if the connector already exists for PowerApprovals, it can be shared so that Invoice Capture can also use it (and vice versa).

1. Open your browser and go to Power Apps studio.
2. Log in with the PowerApprovals service account user (e.g., svc_powerapprovals@mycompany.com).
3. Select the correct environment (as shown below).



4. Click on *Connections*.
5. Open the SQL Server connector menu by clicking (...) and select *Share*.



6. Enter the email address of the account user for the respective service you want to share. E.g., svc_invoices@mycompany.com.

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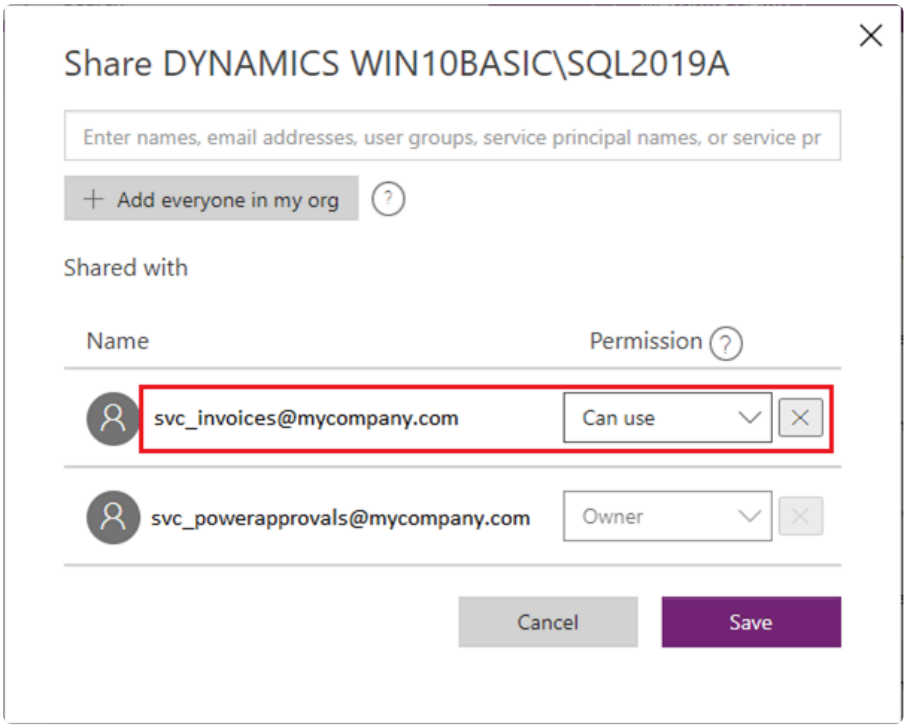

7. For the desired email address, set the permission to *Can use*.
8. Click *Save* to finalize sharing the connector.

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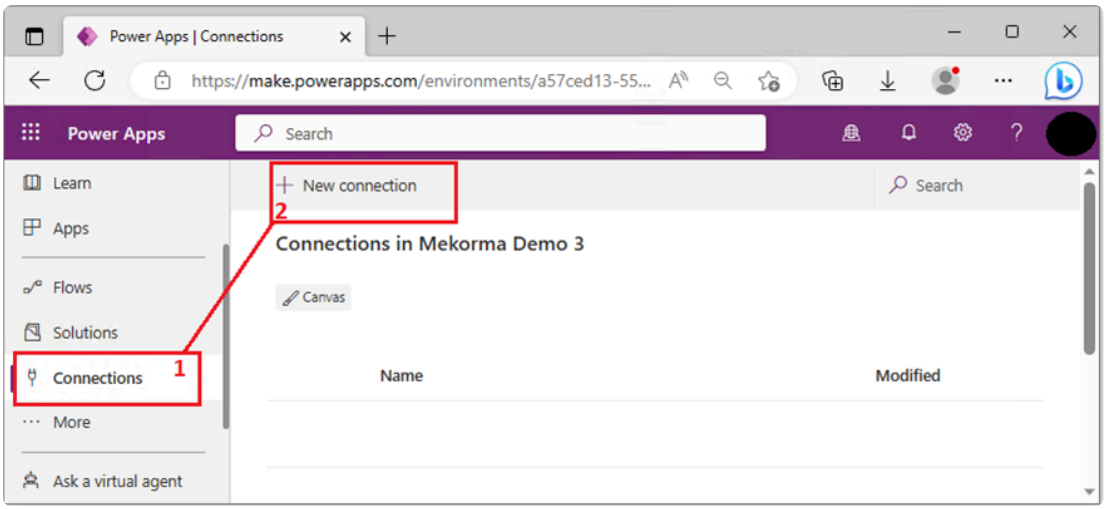
8. Creating an Email Notification Agent in your Power Apps Environment

By default, Mekorma PowerApprovals is equipped to work with the standard platform mail connector. The mail connector is used to send email notifications to approval requestors and second approvers, once a transaction has been processed by an approver.

PowerApprovals can also leverage the Office 365 connector.

> Setting up the standard mail connector flows directly from the previous section, Creating a Connection to Your On-Premises SQL Server in Your Power Apps Environment. Review that section before continuing with creating your mail connector.

1. To create a new mail connector, open the **Connections** menu and select *+ New Connection*.



2. In the **New Connections** window, type *mail* in the search bar to locate the **Mail (by Microsoft)** connector in the list of available connectors; select it.

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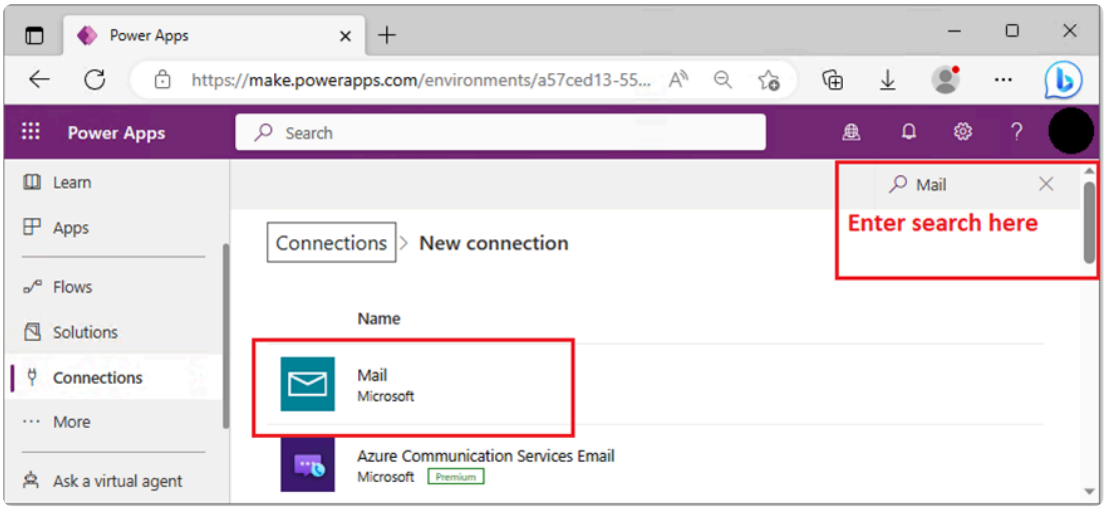
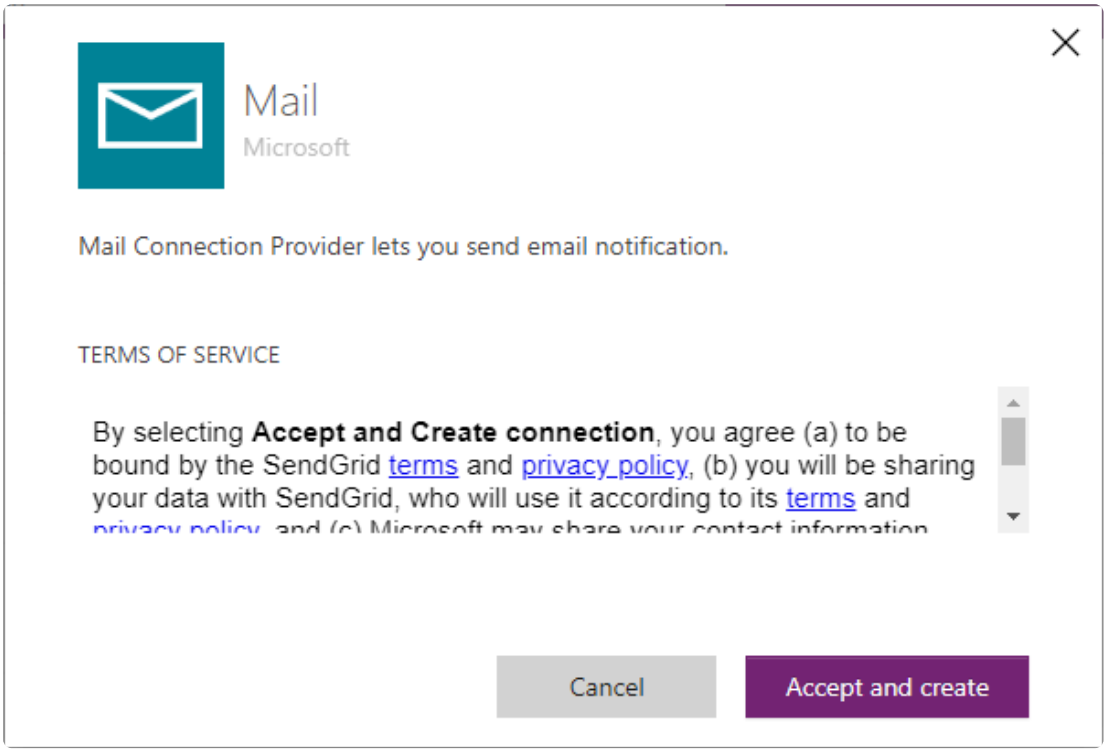


3. You will be prompted to accept the permissions required to set up the mail connector. Click *Accept and create* to proceed.



4. The mail connector is now created and will appear in the list of available connectors.

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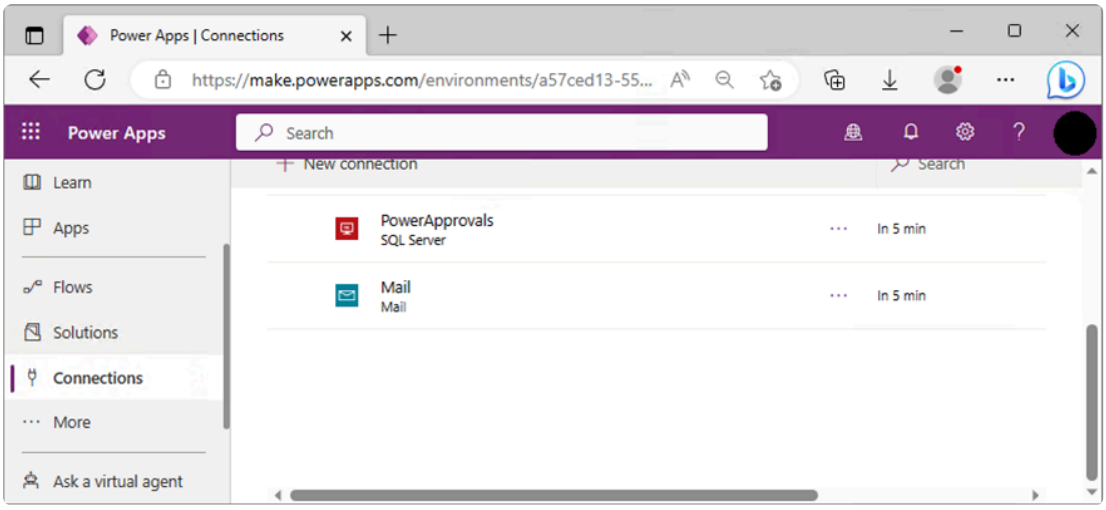

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9. Downloading PowerApprovals

Download the PowerApprovals resource file that aligns with the version of Mekorma you are using.

Build x90
Build x88
Build x87
Build x86
Build x84

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10. Importing PowerApprovals into Your Power Apps Environment

PowerApprovals is a Mekorma product that needs to be imported into the Power Apps cloud. In this section, you will be instructed to download the application package and import it into Power Apps.

Prerequisites for Importing PowerApprovals

Download the PowerApprovals package from the Mekorma website. Upon clicking *Download PowerApprovals*, a zip file will be downloaded. **Do not open it**, you will import the file to the cloud in the steps that follow.

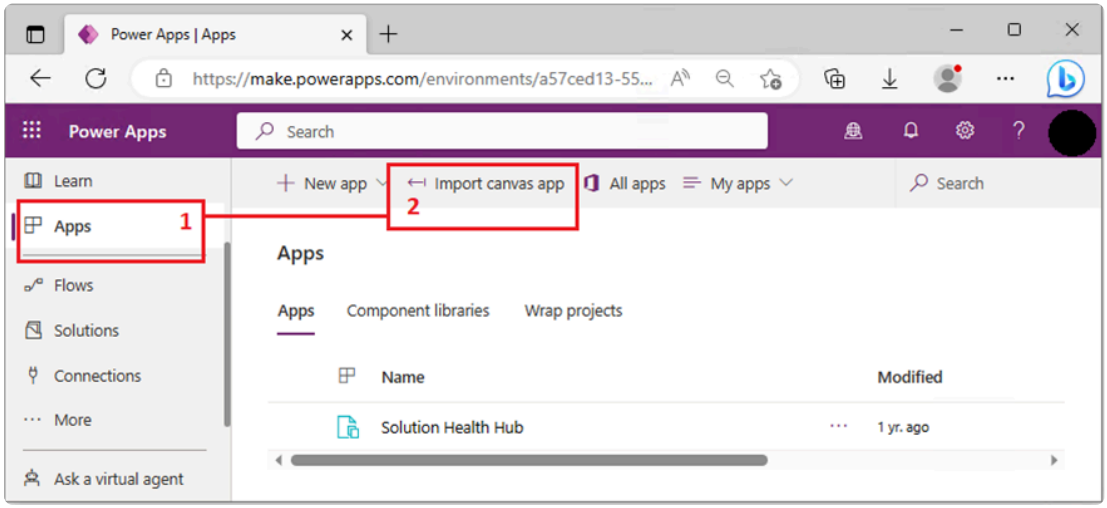
If you need an older version, scroll to the bottom of the page and open the Build Archive. Locate the PowerApprovals build that you need and download it via the link provided.

> If you have several Power Apps environments, please ensure you select the correct environment prior to initiating the import steps outlined below.

Import Steps

PowerApprovals

1. Open your browser in private mode, go to the Power Apps website, and log in as the service account user.
2. Click *Apps* and then *Import canvas app*.



3. Click the *Upload* button to select the PowerApprovals zip package you downloaded from the Mekorma website.

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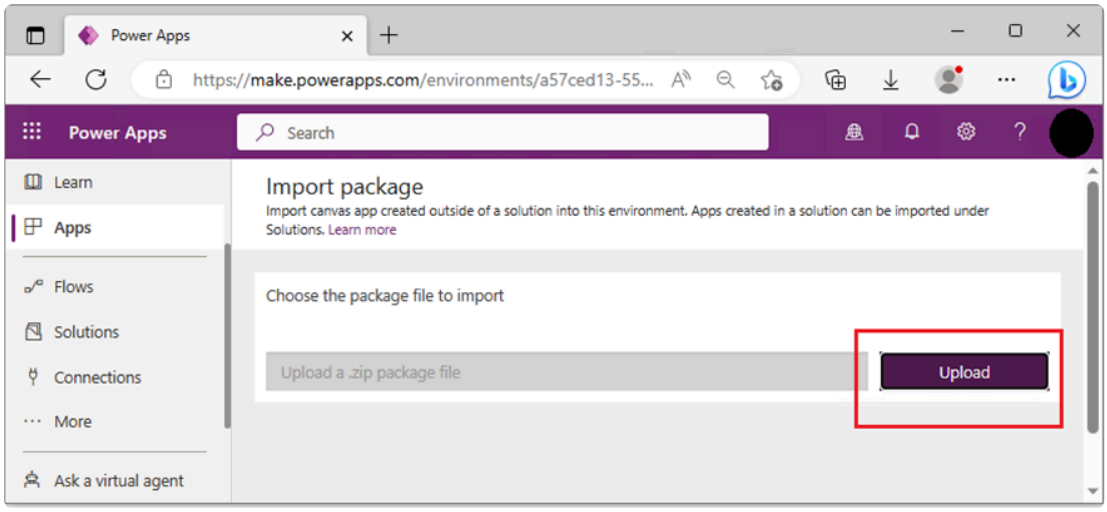
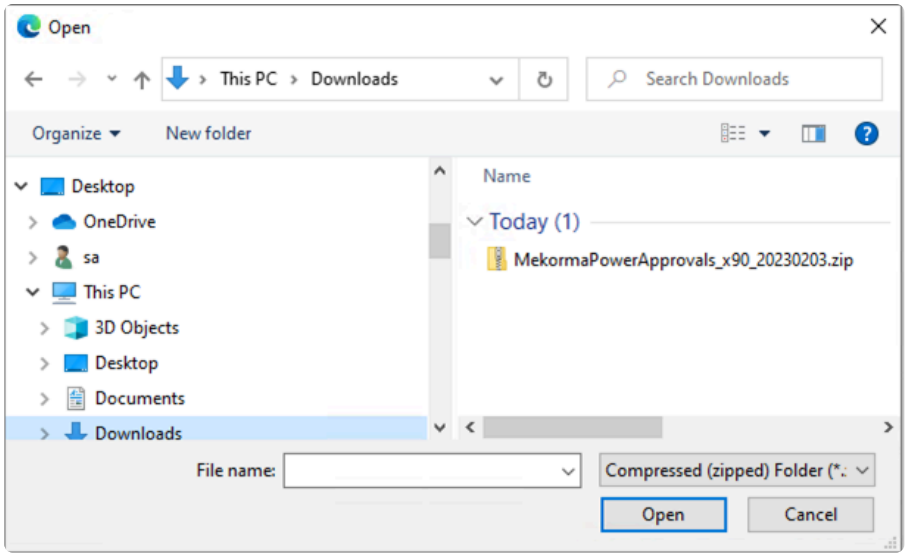
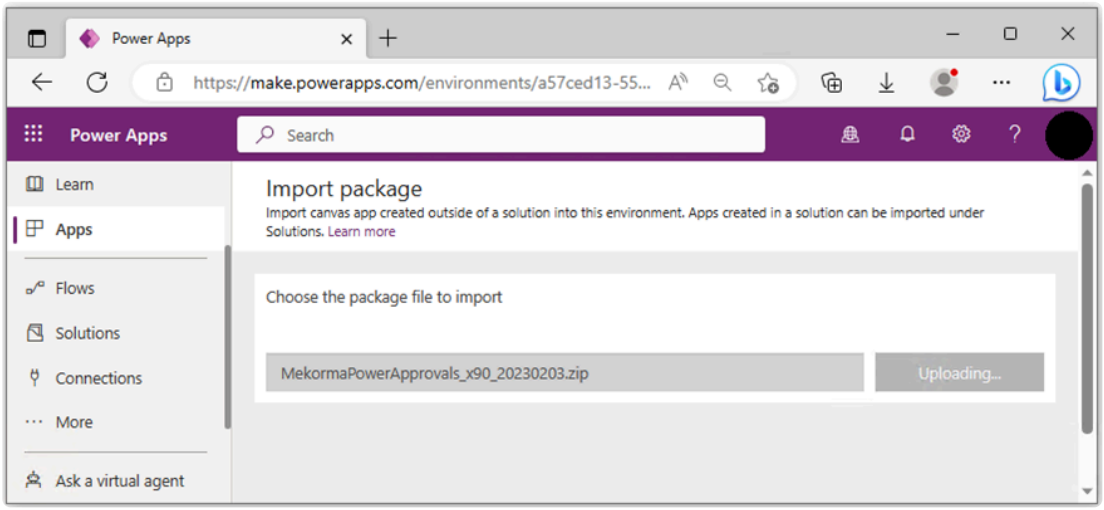


4. Select the PowerApprovals zip file and click *Open*.



5. Uploading the package will take a few minutes, do not navigate away from this page during the process.



6. Once imported, begin setting up the app by clicking the wrench icon for *Mekorma PowerApprovals app*.

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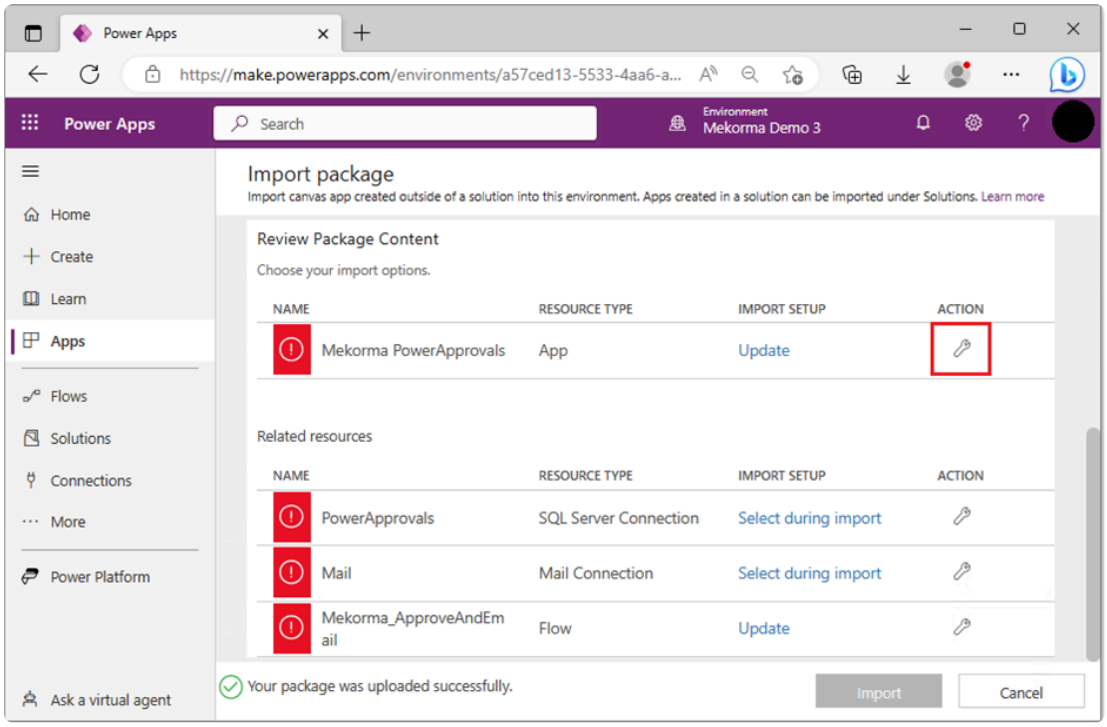
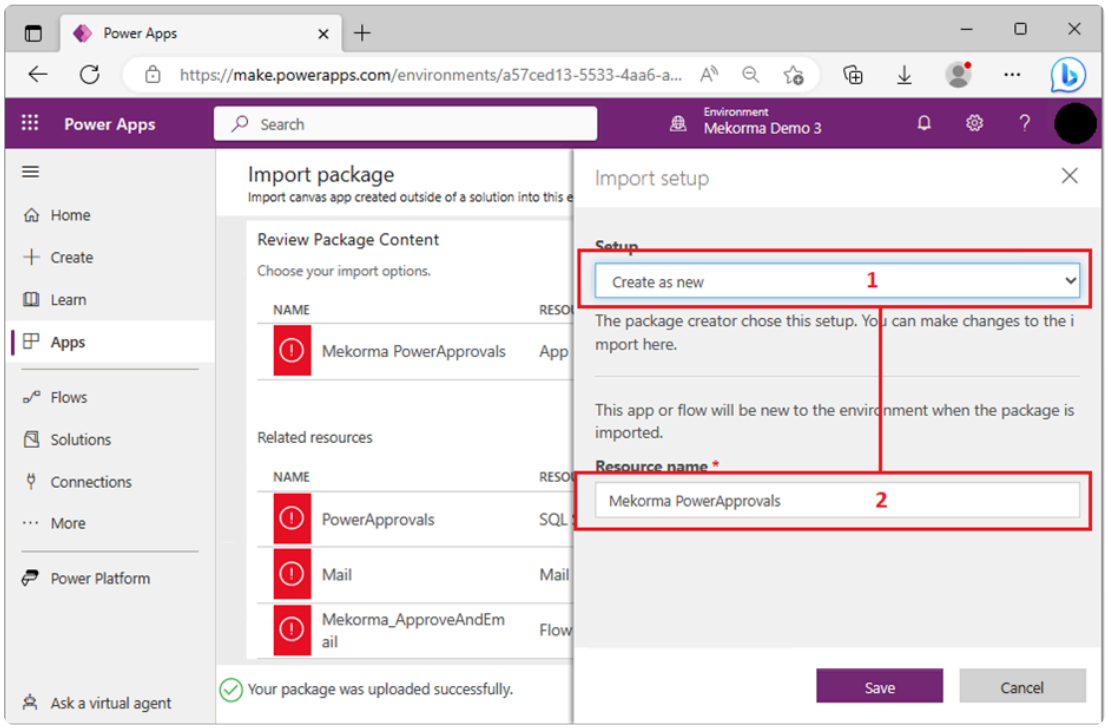


7. In the **Import setup** window, change the **Setup** drop-down to *Create as new*. Under **Resource name**, set to *Mekorma PowerApprovals*.



8. Click *Save* to finalize the changes.
9. To set up the SQL Server connection, click the wrench icon for *PowerApprovals*. **Note:** Pay attention to the **Resource Type**. Step 6 above focuses on the Mekorma PowerApprovals app, here you want to access the PowerApprovals SQL Server Connection.

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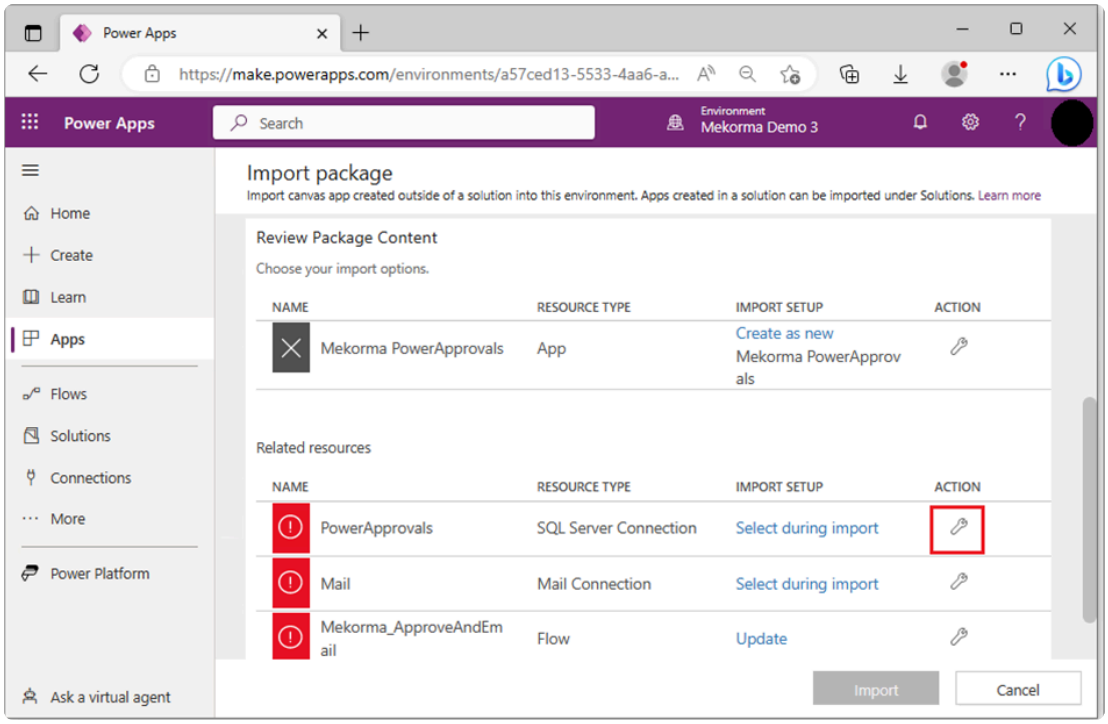
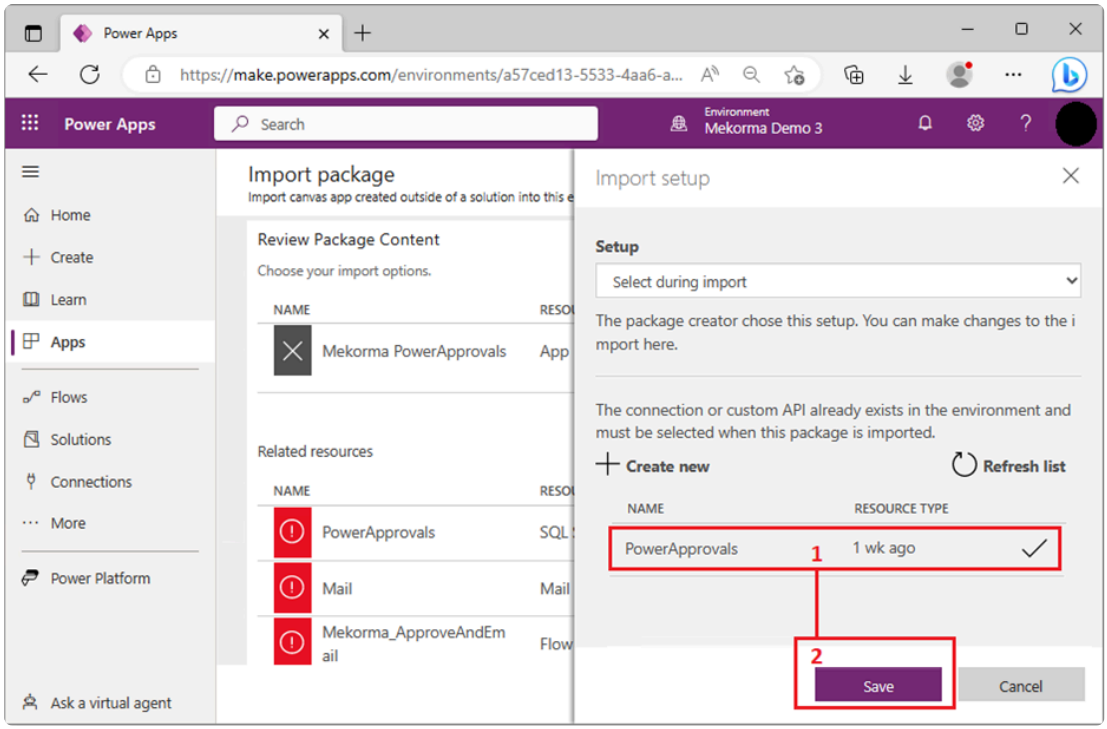


10. In the **Setup** drop-down, set it to *Select during import* and select the SQL Server connector, in this case *PowerApprovals*. Click *Save* to finalize the setup.



Mail Connector

1. To set up the mail connection, click the wrench icon for **Mail**.

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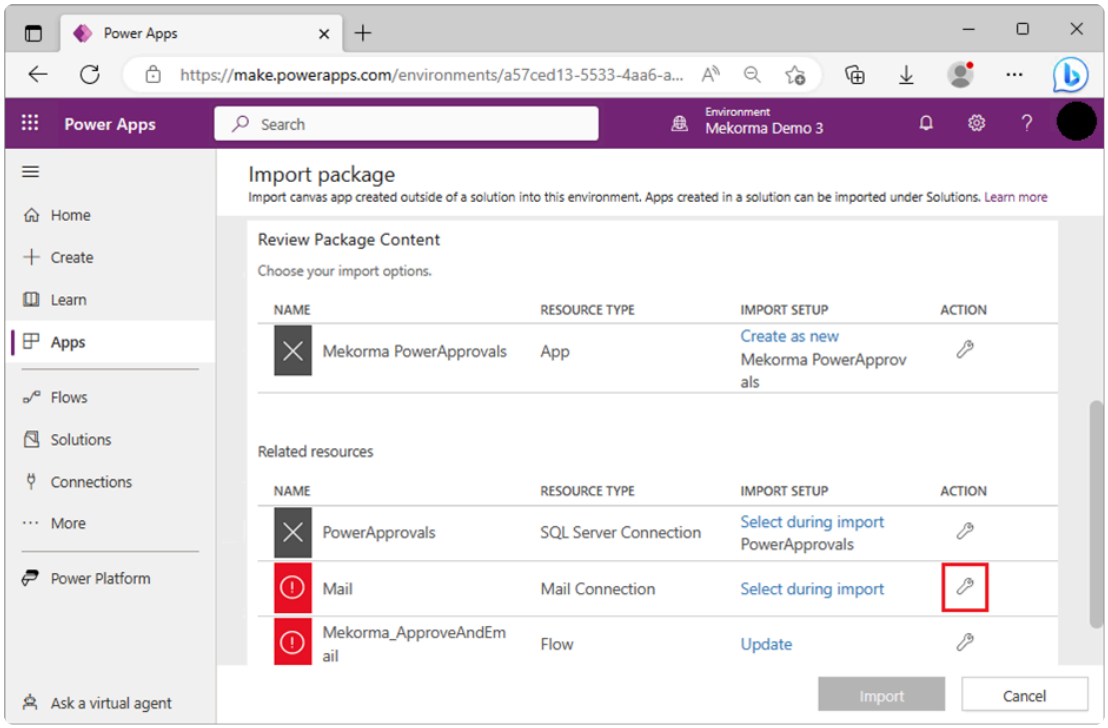
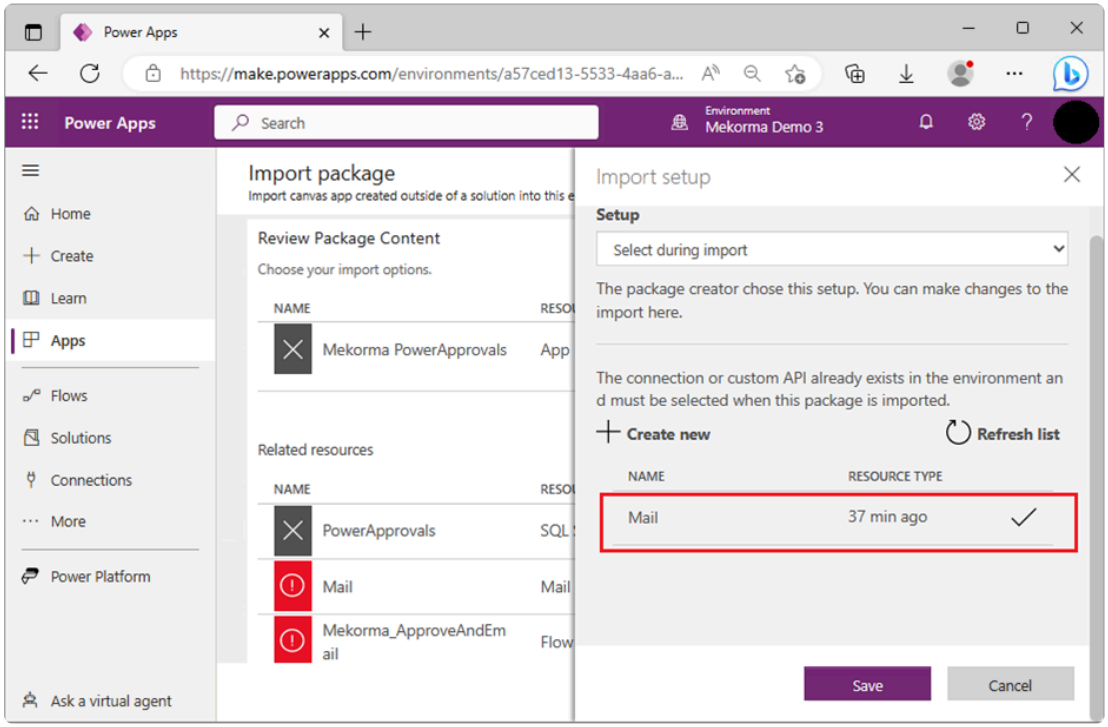


2. Set the **Setup** drop-down as *Select during import* and select the mail connector. Click *Save* to finalize the setup.



Flow

1. To set up the flow, click the wrench icon for **Mekorma_ApproveAndEmail**.

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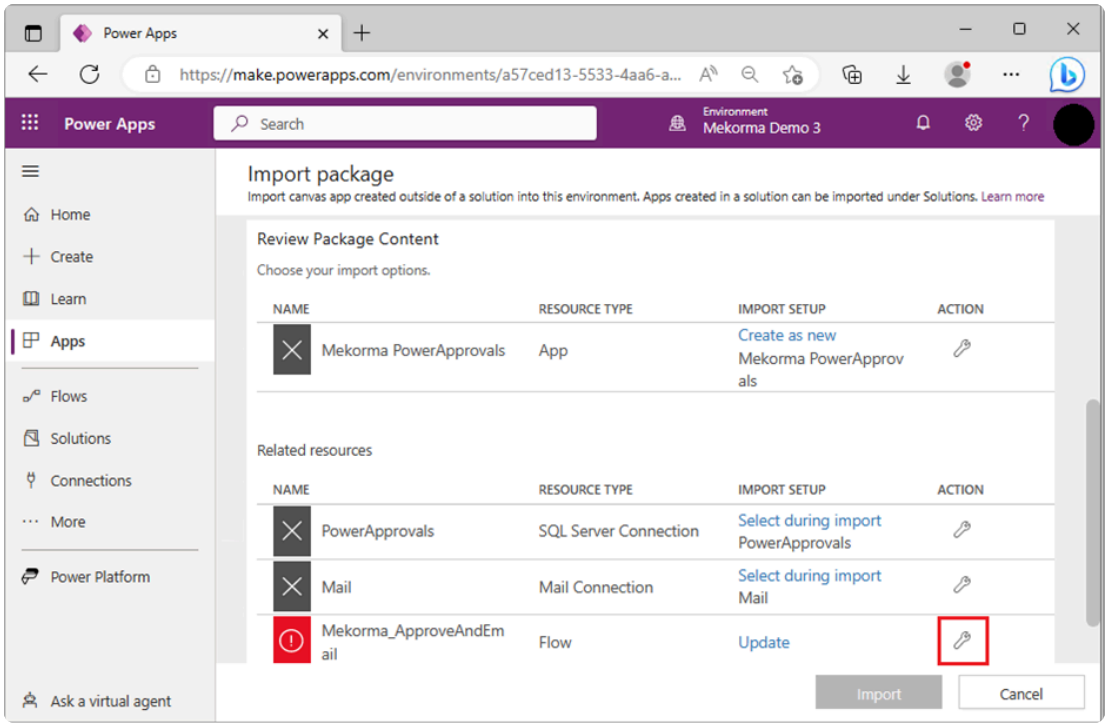
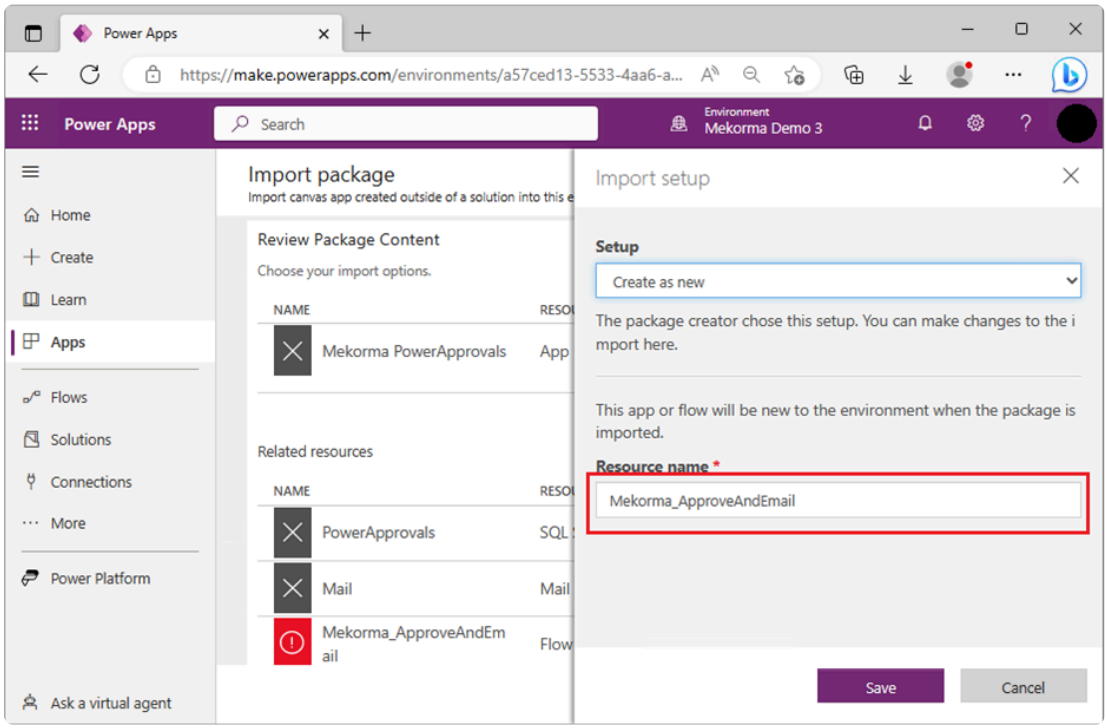


2. Set the **Setup** drop-down as *Create as new* and leave the default resource name. Click *Save* to finalize the setup.



Finalize PowerApprovals Import

Finalizing

1. When you are ready to finalize importing PowerApprovals, your window should look like this:

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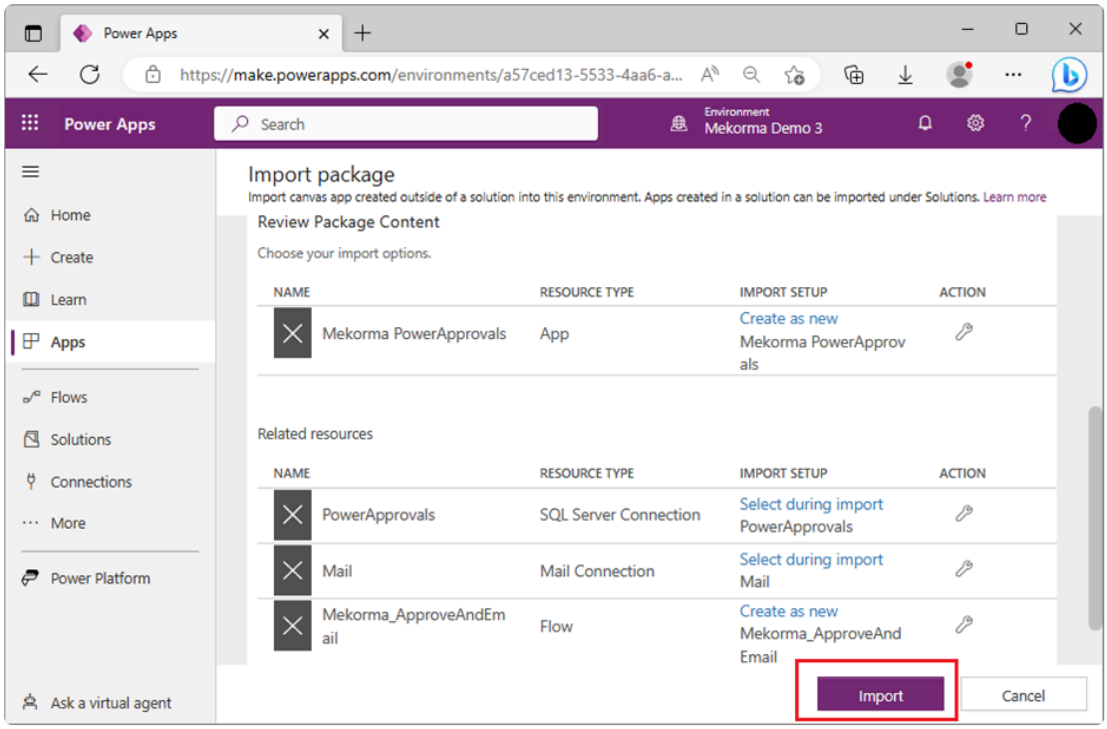
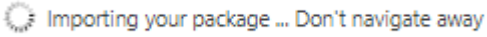
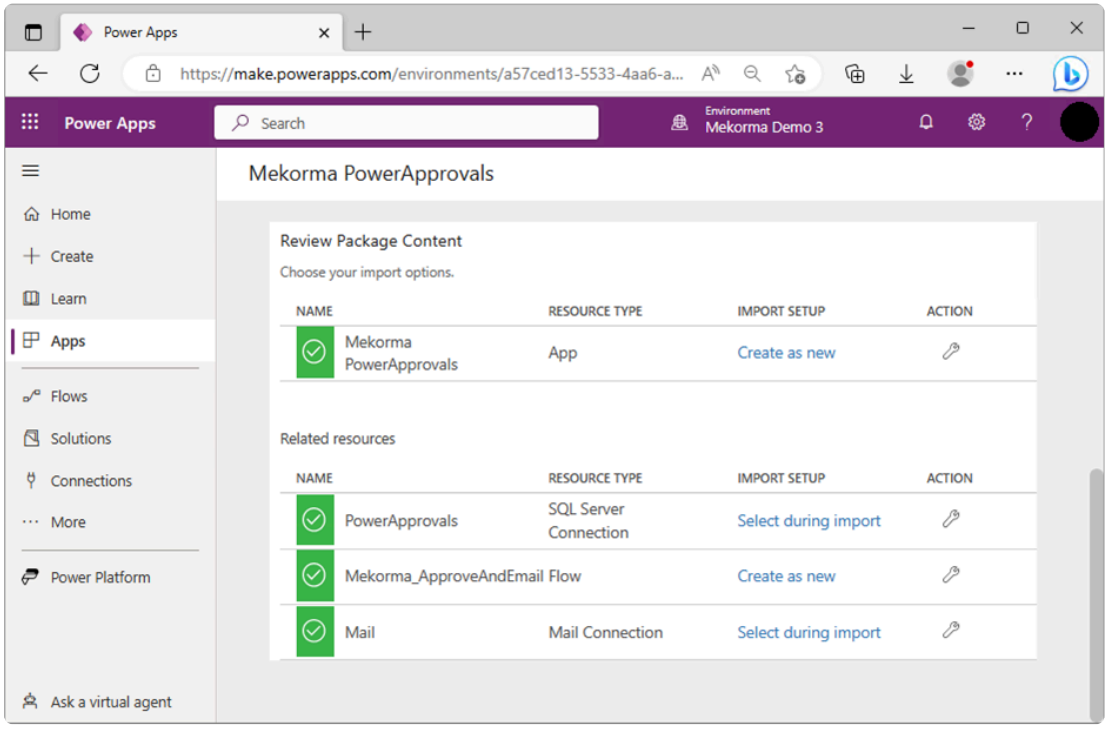


2. Click *Import* to finalize the setup. Allow the system to finish importing; the process will take a few minutes and you will see this status while it is working.



3. Once the import is complete, the resources on your page will be updated with a green checkmark next to them.



4. Open **Apps** to verify that PowerApprovals has been imported into your Power Apps environment.

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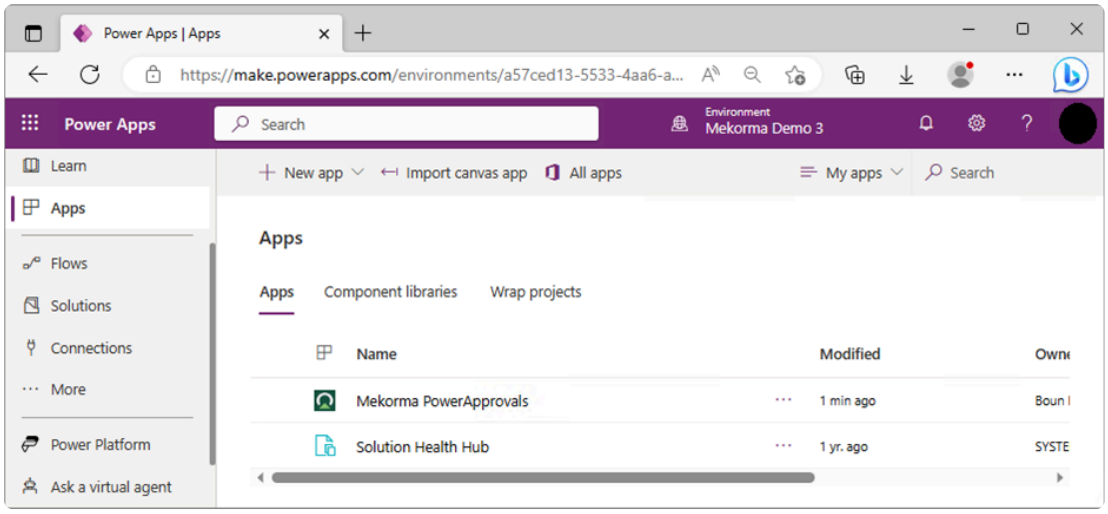
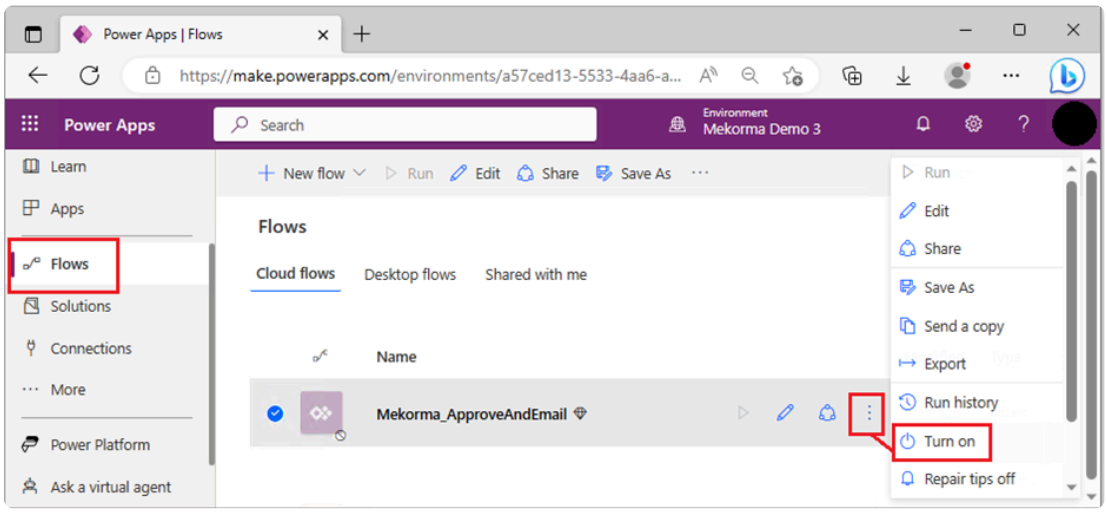


Turning on the Flow

By default, Microsoft has the flow deactivated. Follow the instructions below to turn it on

1. Select **Flows** in the left-hand navigation pane. Note that Mekorma_ApprovalAndEmail flow is greyed out because it defaults to be turned off.



2. Click the ellipsis to view additional options and select **Turn On**.
3. The flow is now turned on and ready to use.

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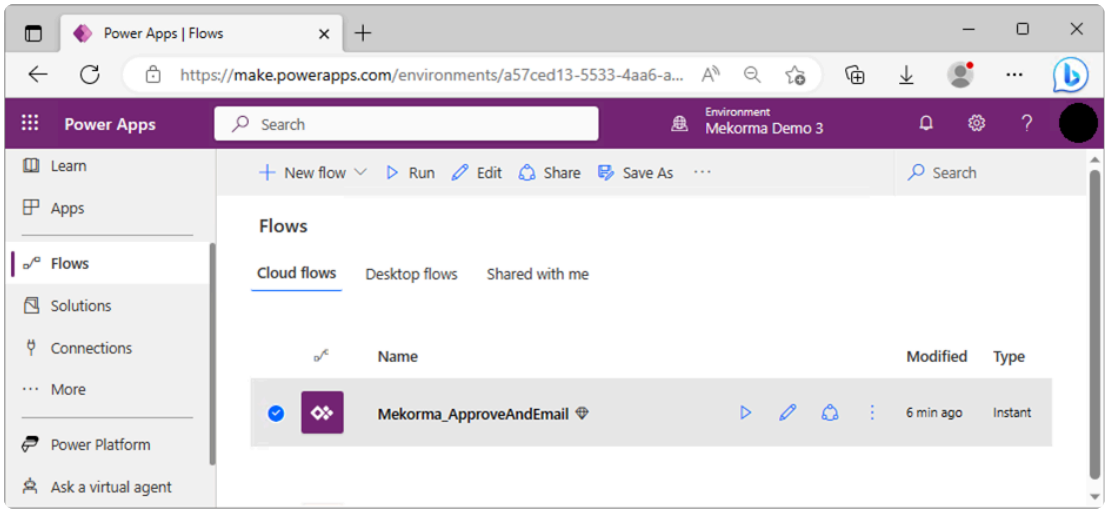

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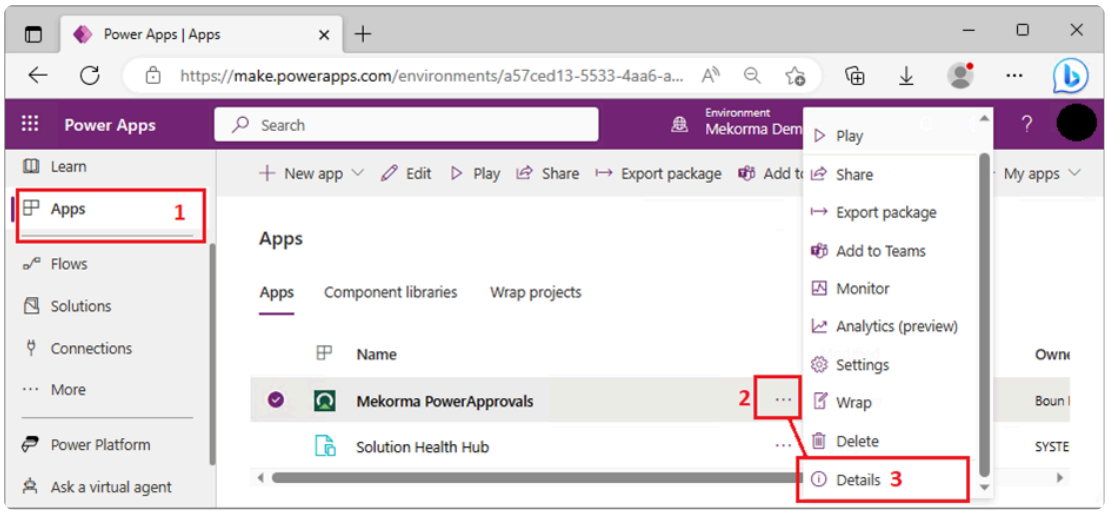
11. Getting the Application Web Link and QR Code

The application web link and QR code allow you to share the app with your approvers. Opening the link or scanning the QR code takes users to the PowerApprovals app in either their browser or their phone. Follow the steps below to obtain your web link and QR code.

> ! You must have PowerApprovals installed and imported into your Power Apps environment before you continue this process.

The web link and QR code are located in the *Details* section of the app. To view the details of Mekorma PowerApprovals, click the ellipsis to the right of Mekorma PowerApprovals and select *Details*. Mekorma recommends saving the web link and QR code for record keeping purposes.



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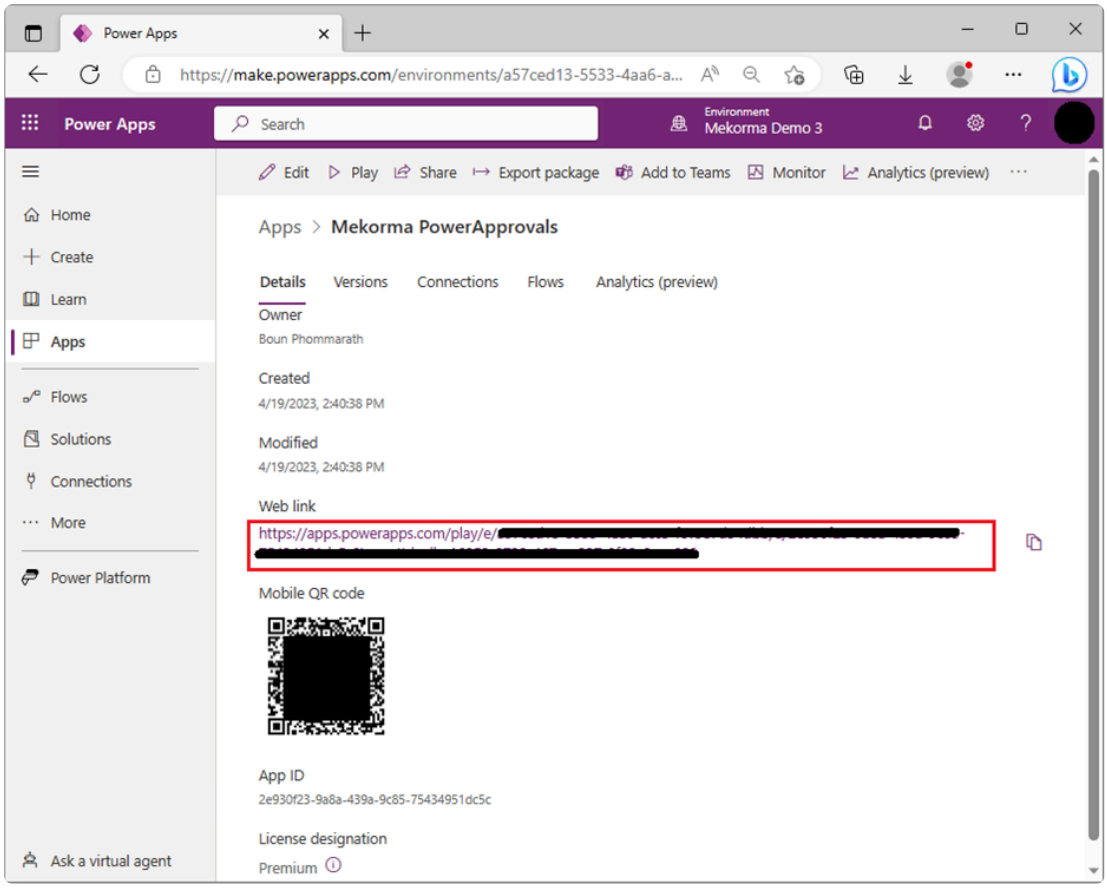

Saving the web link in Dynamics GP

The PowerApprovals web link is integral to the approval workflow, as the link is included in the approval emails that are sent out when a batch approval has been requested. To ensure that PowerApprovals operates correctly, the web link needs to be saved in the **Approval Email Setup** window in Dynamics GP.

1. Run Dynamics GP and log in with a user that has access to the Mekorma Payment Hub setup windows.
2. In the Mekorma area page, access Security Setup (Setup > System > Security Setup).
3. Click *Approval Email Setup* on the ribbon of the **Mekorma Security Maintenance** window
4. Enter the web link in the *PowerApproval Web Link* field of the **Approval Email Setup** window.

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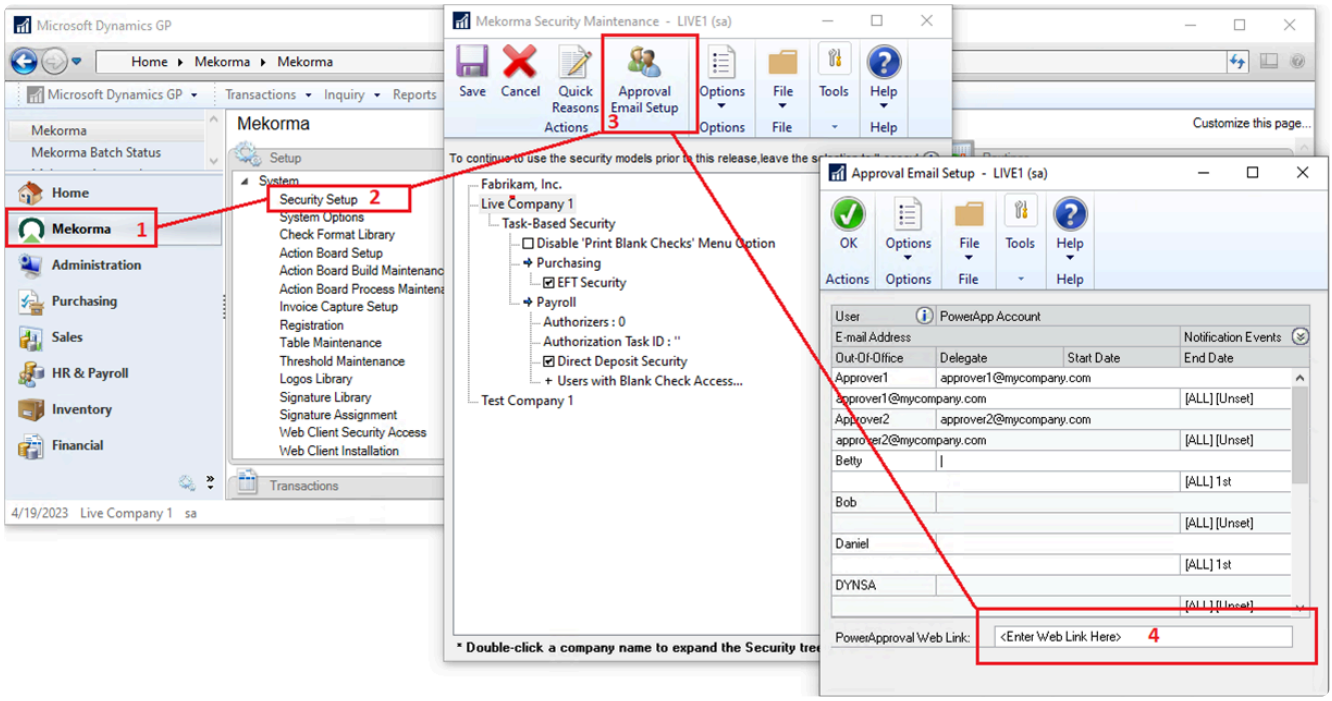

5. Click *OK* to finish the setup.

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12. Sharing Mekorma PowerApprovals to Batch Approvers

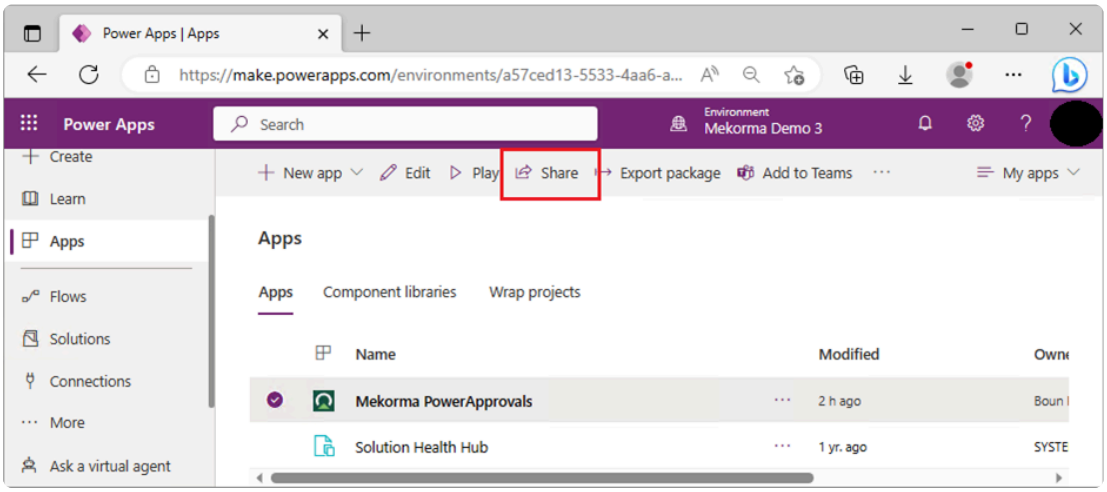
Before you can use PowerApprovals, you must share Power Apps to approvers in your company. You can specify each user by name or specify a security group in Azure AD. Mekorma recommends setting up an Azure AD group for large groups of approvers for easy administration.

Prerequisites

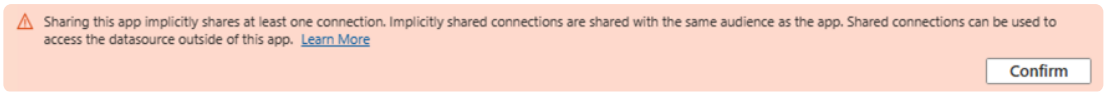
A complete list of approvers or Azure AD group name containing the list of approvers.

Steps

1. In PowerApps, click on **Apps** in the left-hand navigation pane to show the **Mekorma PowerApprovals** app.
2. Highlight the **Mekorma PowerApprovals** row by clicking in the row (not on the app itself).
3. In the top menu, click *Share*.



4. Upon clicking *Share*, you will be prompted with a warning message. Click *Confirm* to continue.



5. Add the necessary users to the list of approvers. Start typing the email address of each approver and the system will find the person matching the email address.

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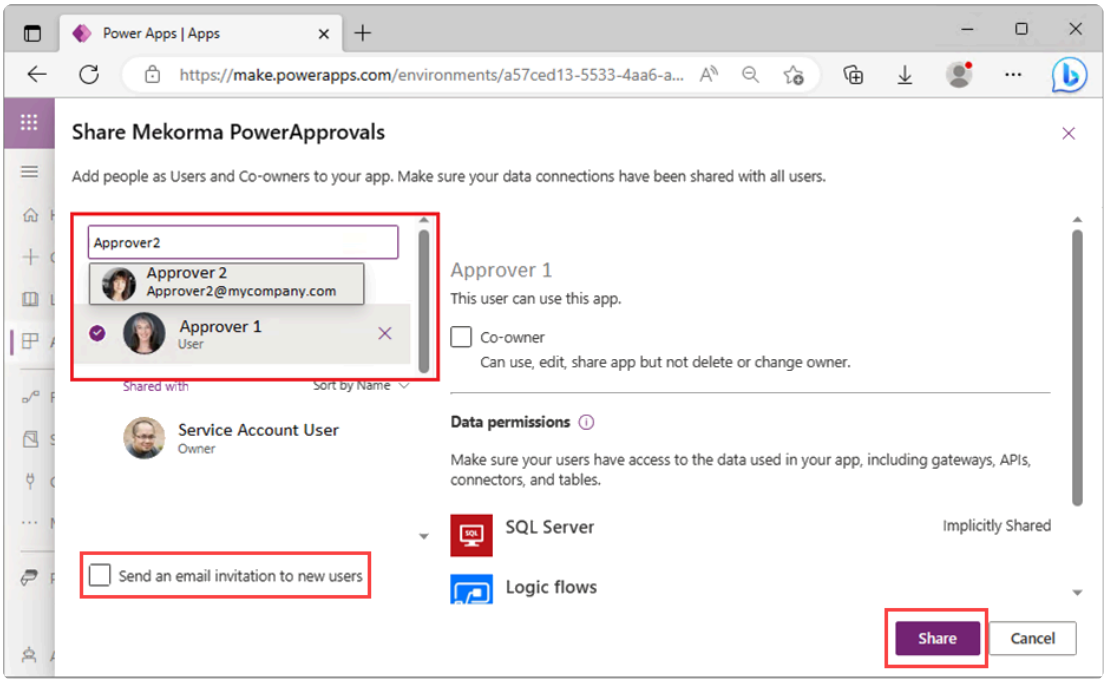

6. Once you are done adding approvers, unmark the *Send an email invitation to new users* checkbox. We do not want approvers to be notified until PowerApprovals is fully implemented and tested.
7. Click *Share* to finalize.

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13. Deploying the Power Apps Mobile Client

For the approver on the go, Power Apps offers a mobile app, which acts as a container for third-party Power Apps services. Mekorma PowerApprovals runs within the context of the Power Apps mobile app. Each approver user must install the Power Apps mobile app to be able to access PowerApprovals from their mobile device.

Prerequisites

Mekorma recommends that the Power Apps environment administrator shares the PowerApprovals app with each approver user prior to the installation of the Power Apps mobile client, but this is not required..

Steps

1. On your phone, download Power Apps from the Apple App Store or Google Play onto an iPhone, iPad, or Android device running a supported operating system.
2. Open Power Apps on your mobile device and sign in by using your Azure Active Directory credentials.

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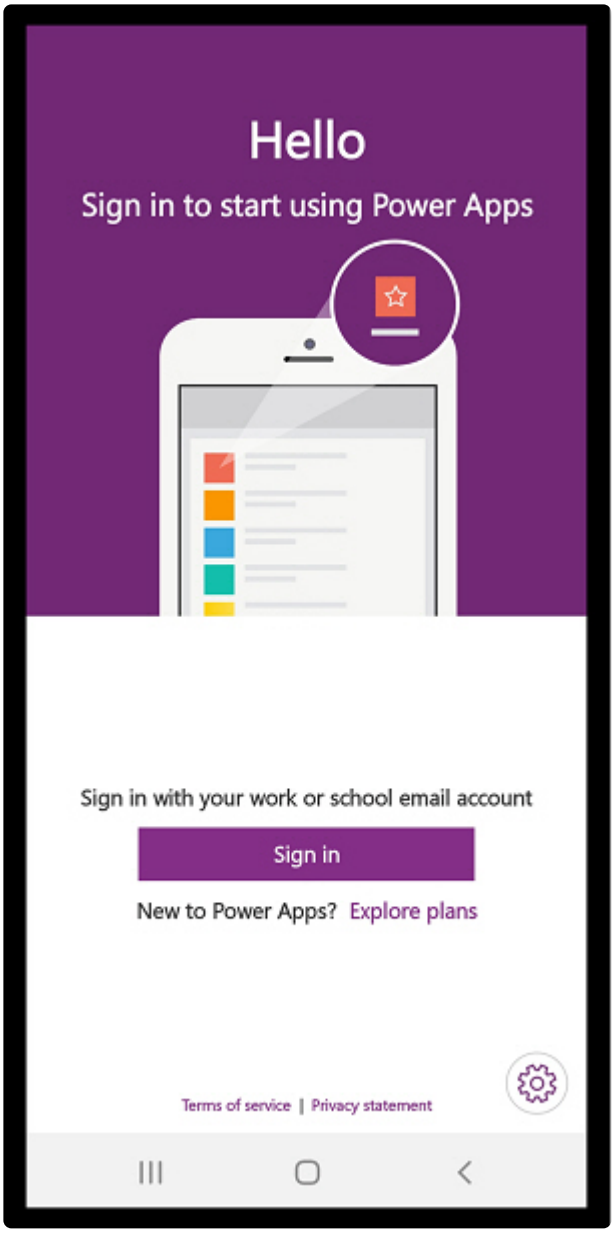
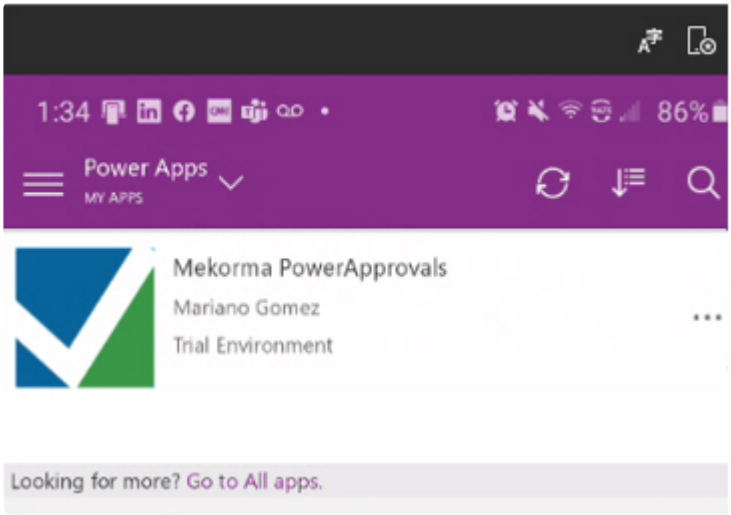


3. Mekorma PowerApprovals is listed as an app being shared with you. To run the app, simply tap on it.



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14. Integrating Mekorma PowerApprovals with Office 365 for Email Notifications

Although PowerApprovals can send notifications through its built-in email capabilities, Office 365 customers may prefer that approval requestors receive email notifications directly from the approver. To achieve this, a Power Apps environment maker or app owner needs to make a few changes to the app and flow.

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14.1. Modifying the Flow

The following steps will replace the default email action (i.e., **Send an email notification (V3)**) with the **Send an Email (V2)** action. This change will cause PowerApprovals to send an email to the batch requesters from the batch approver's Office 365 account. If you are satisfied with emails coming from the system, skip to section 15, Mapping Power Apps Approver Accounts to Microsoft Dynamics GP Login Accounts.

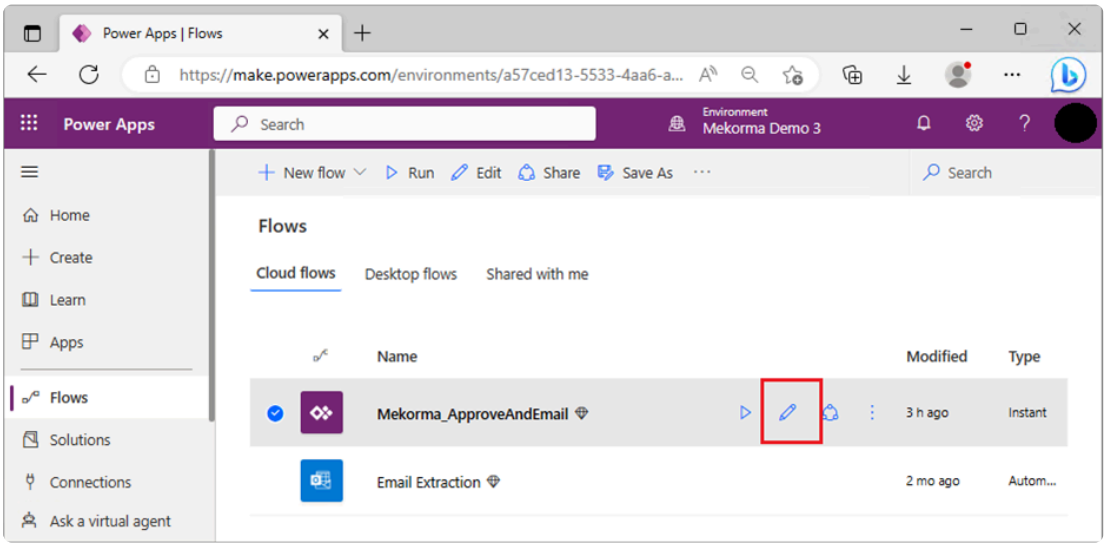
> ! WARNING: If you are not familiar with Microsoft Power Automate or the steps required to add an action, please contact Mekorma Professional Services for assistance.

Prerequisites

Perform these steps as an environment administrator.

Steps

1. Open your browser, go to Microsoft Power Apps, and log in as the service account user.
2. Click on **Flows** in the left-hand navigation pane.
3. Select the **Mekorma_ApproveAndEmail** flow and click on the pencil icon to edit. This takes you to the Power Automate design surface.



4. Find the *Apply to each – List of Email Recipients* action and click on it to expand downward.

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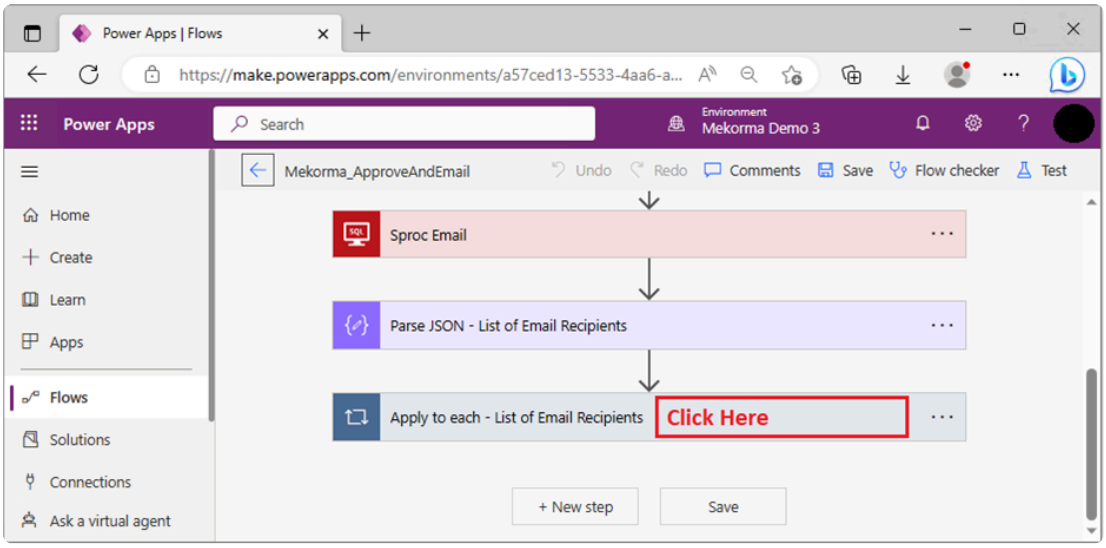
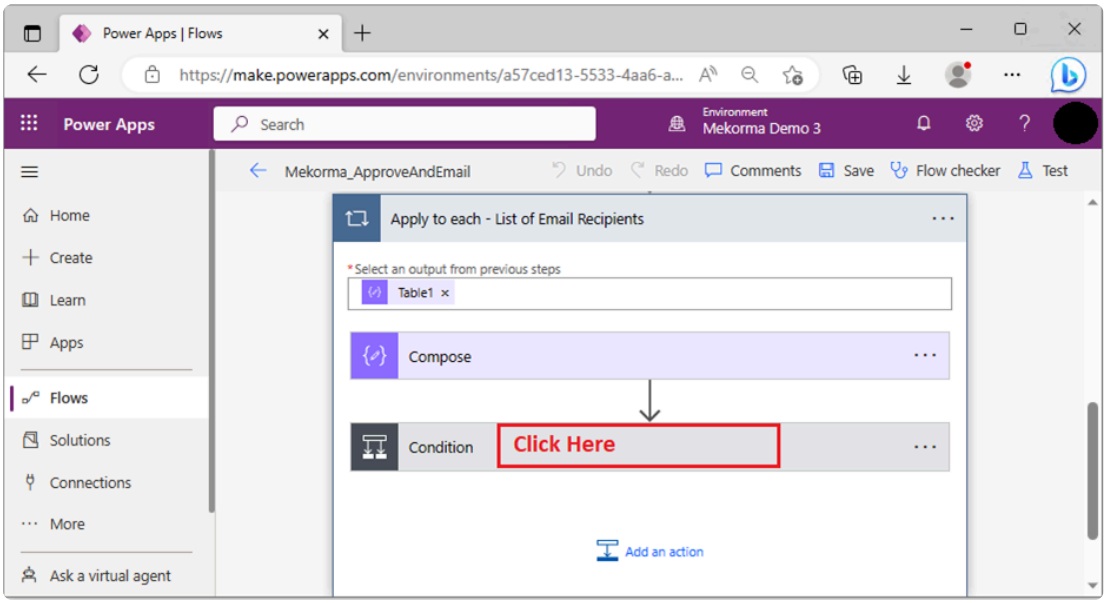


5. Next, find the *Condition* action and click to expand downward.



6. Scroll to the bottom and click the *Apply to each* action to expand downward.

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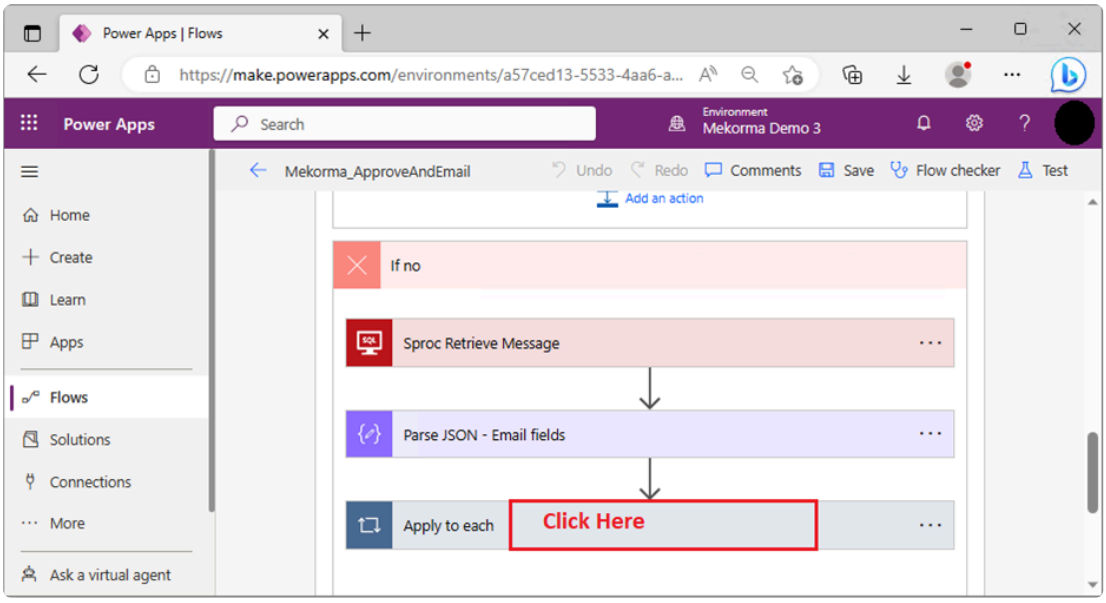
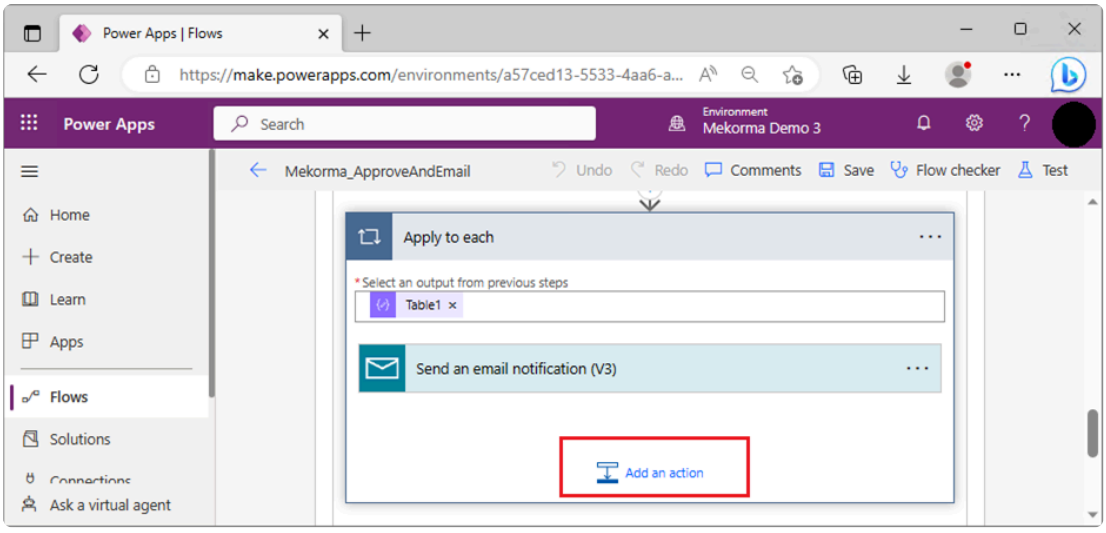


7. Click on *Add an action*, immediately below the *Send an email notification (V3)* action, within the *Apply to each* control structure.



8. Inside the **Choose an operation** box, which allows you to edit your new action, type *Send an email* in the search bar to filter the list of available actions.

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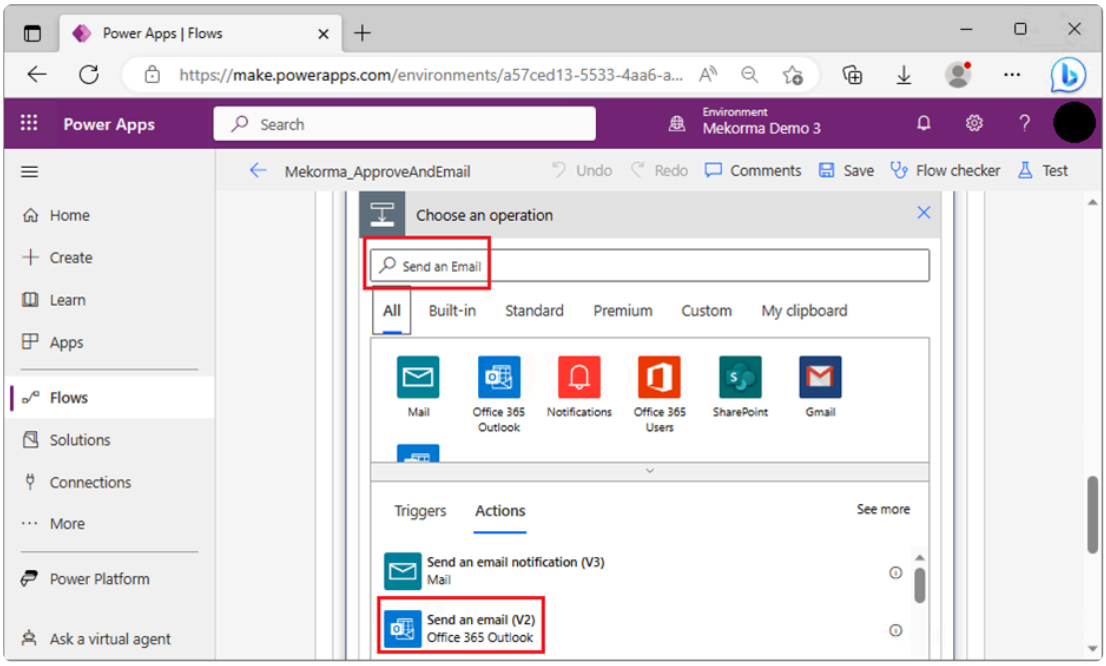
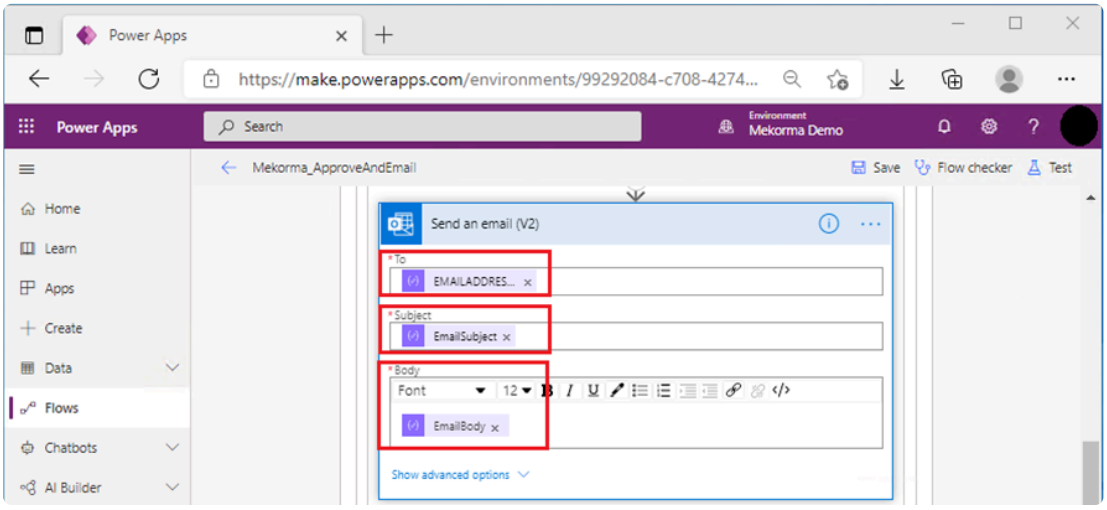


9. Locate and select the *Send an email (V2)* action, as shown above.
10. The action will attempt a connection to your Office 365 account.

> You may be prompted to log in to Office 365 with your user credentials. Follow the prompt to complete the connection. Often, this step is unnoticed because the system will successfully auto login.

11. Populate **Send an email (V2)** as defined below. Click in each field and then click *Add Dynamics Content* to update each field. Select the following token for each field:
    - *To = EMAILADDRESS_I
    - *Subject = EmailSubject
    - *Body = EmailBody



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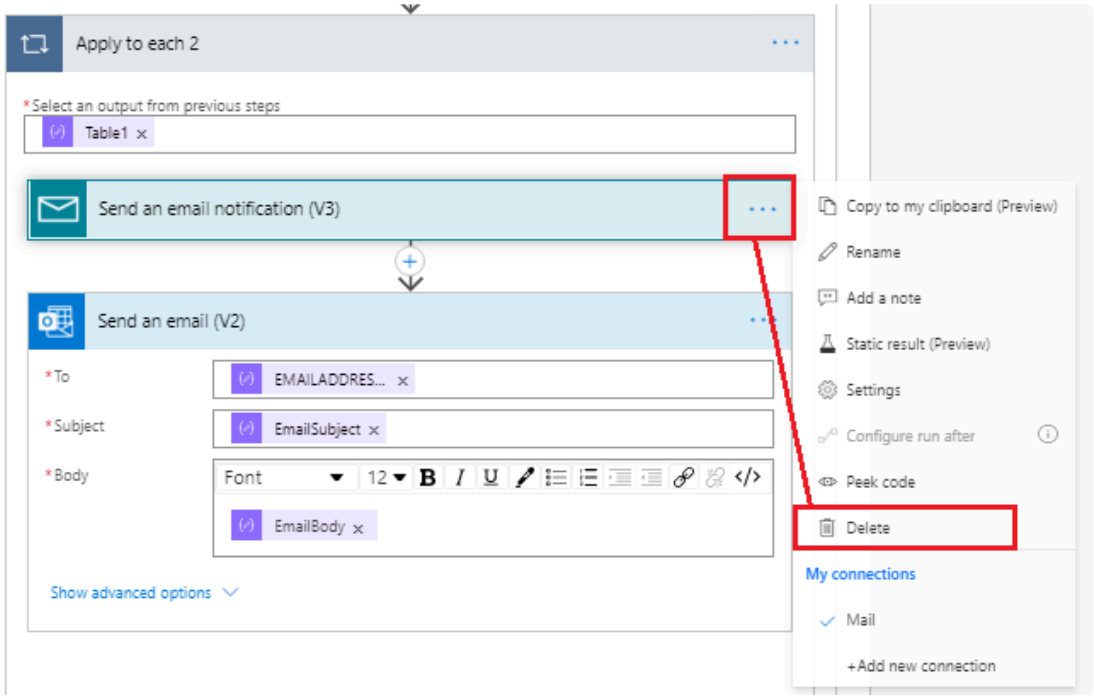
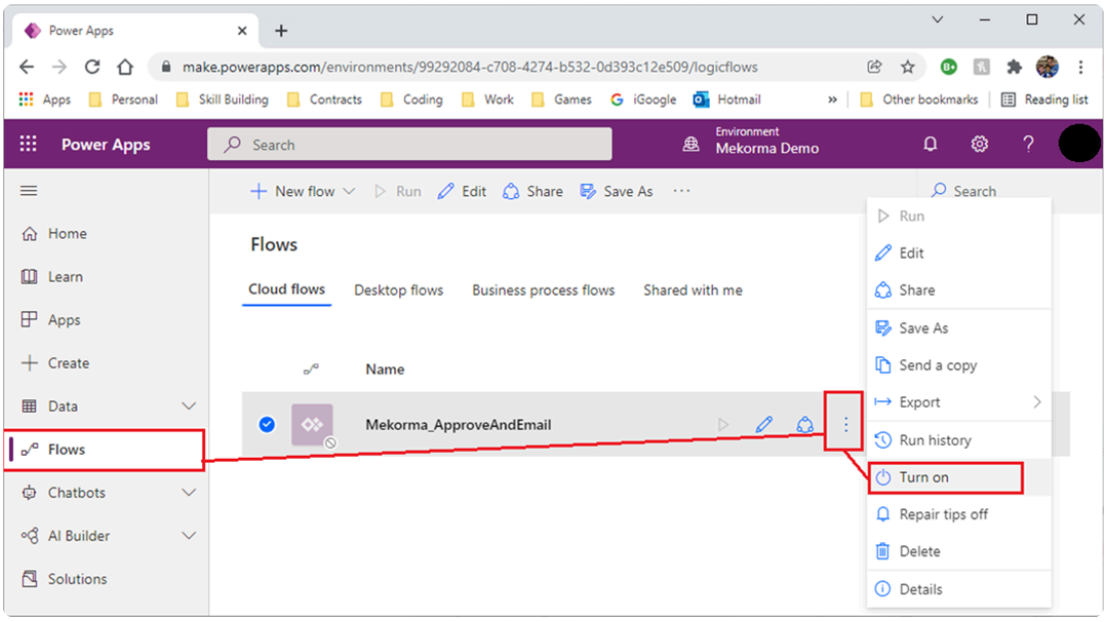
12. Scroll up to the previous action and remove the *Send an email notification (V3)* action from the **Apply to each 2** control structure. Click on the ellipses to the right of the action box and select **Delete** from the context menu.



13. Click *Save* in the upper right-hand corner of the screen to save your changes.
14. Click the blue arrow button to the left of the flow name to exit the designer.
15. You may need to turn on the Flow as shown below. If it is already on, leave it as is.



16. Now you are ready to apply this modified flow to PowerApprovals.

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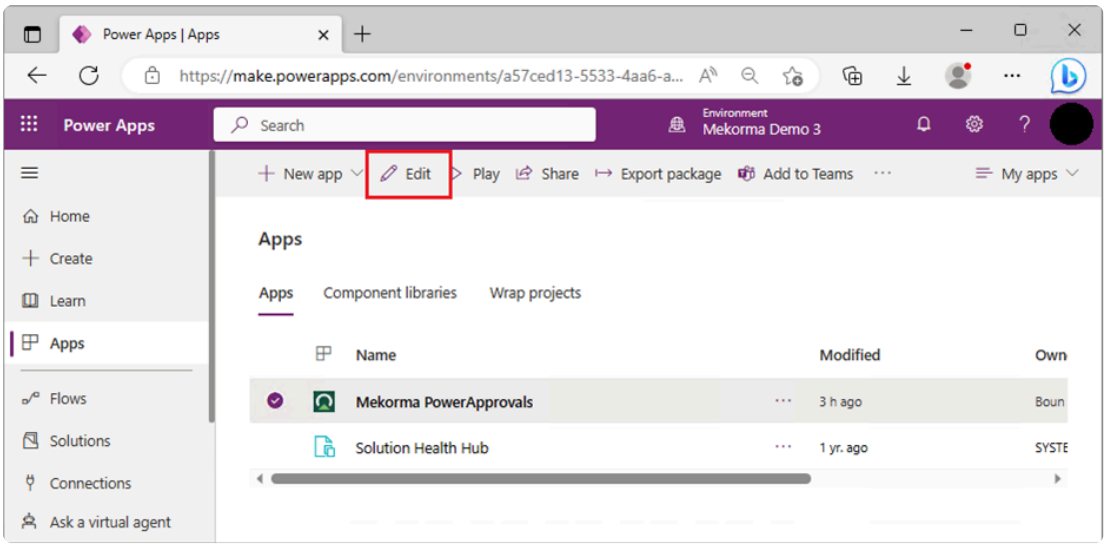
14.2. Updating PowerApprovals with the Modified Flow

Now that you have created a new flow to receive notification emails from Office 365 accounts, you need to update PowerApprovals to use the flow.

> This section is only for users who have created a new flow to receive PowerApprovals emails from the batch approver. By default, emails come from the system; if you wish to create this flow, review the steps in the previous section.

1. Open your browser, go to Microsoft Power Apps, and log in as the service account user.
2. Click on **Apps** in the left-hand navigation pane.
3. Highlight the **Mekorma PowerApprovals** row by clicking in the row (not on the app itself). In the top menu, click **Edit**.



4. If prompted, allow PowerApprovals permission to use any apps listed in the alert window to continue.

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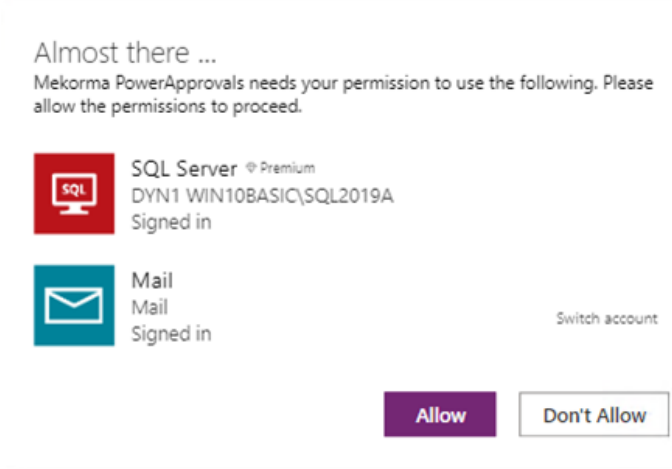
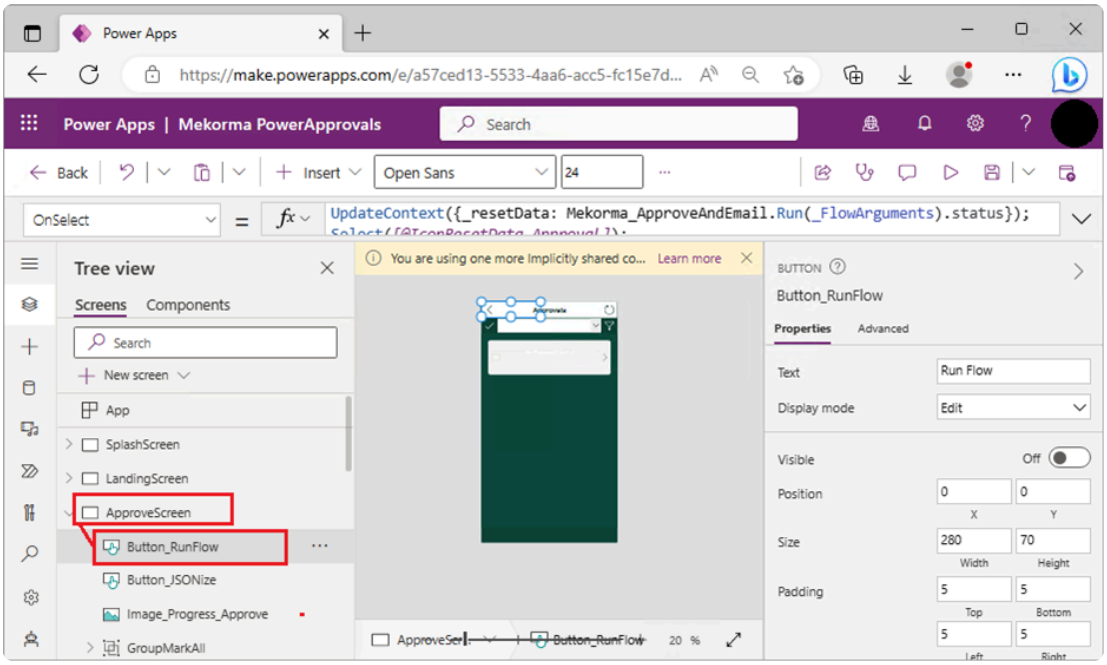


5. In the Tree view, expand **ApproveScreen** and click **Button_RunFlow** to focus on this button.



6. Delete the current flow:
   - Click the **Power Automate** icon.
   - Click the ellipsis (...) to the right of the Logic flows.
   - Select **Remove from app**.

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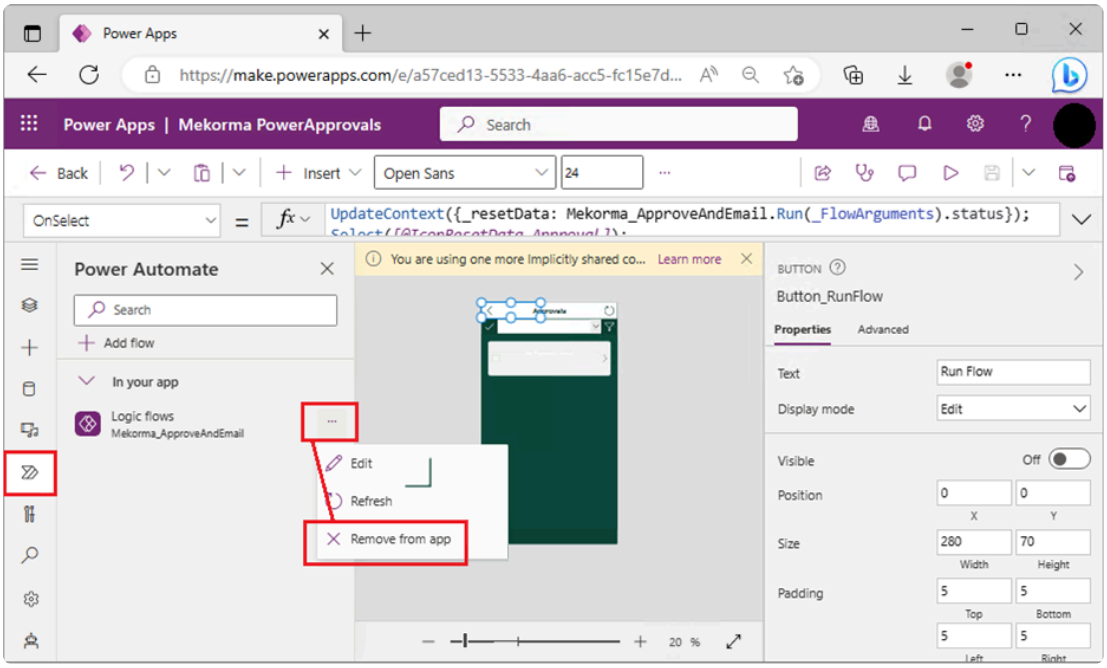
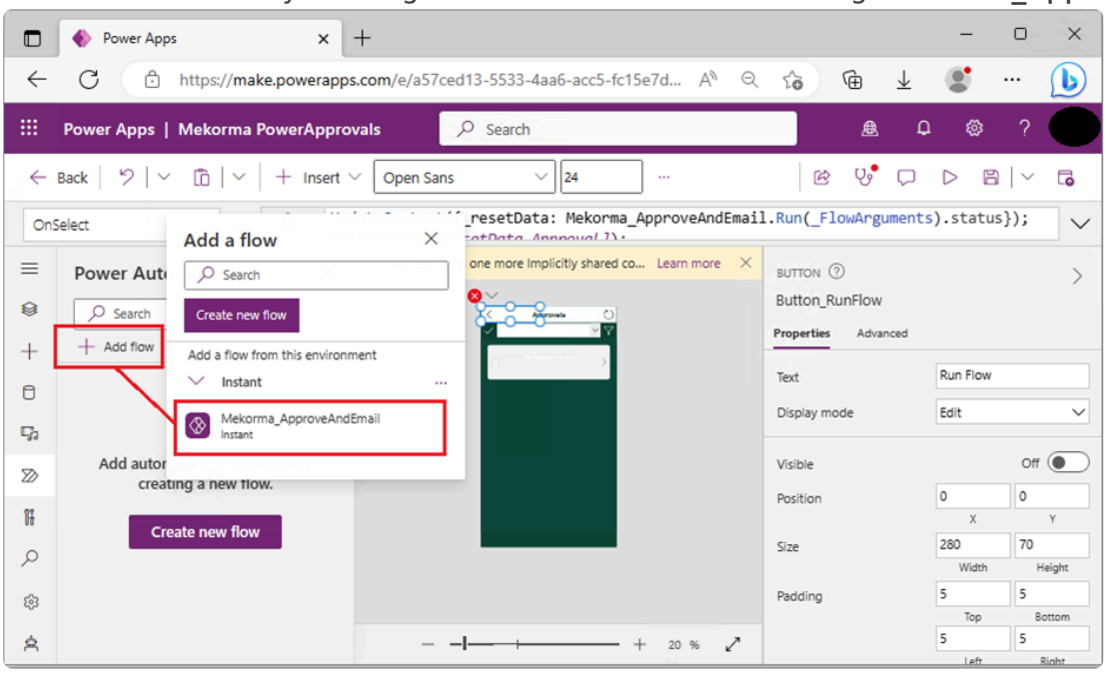


7. Add the new flow by clicking **+ Add flow** and then selecting **Mekorma_ApprovalAndEmail**.



8. The new flow, using **Send an Email (V2)**, is added and **Mekorma_ApprovalAndEmail** is now displayed as the active flow.

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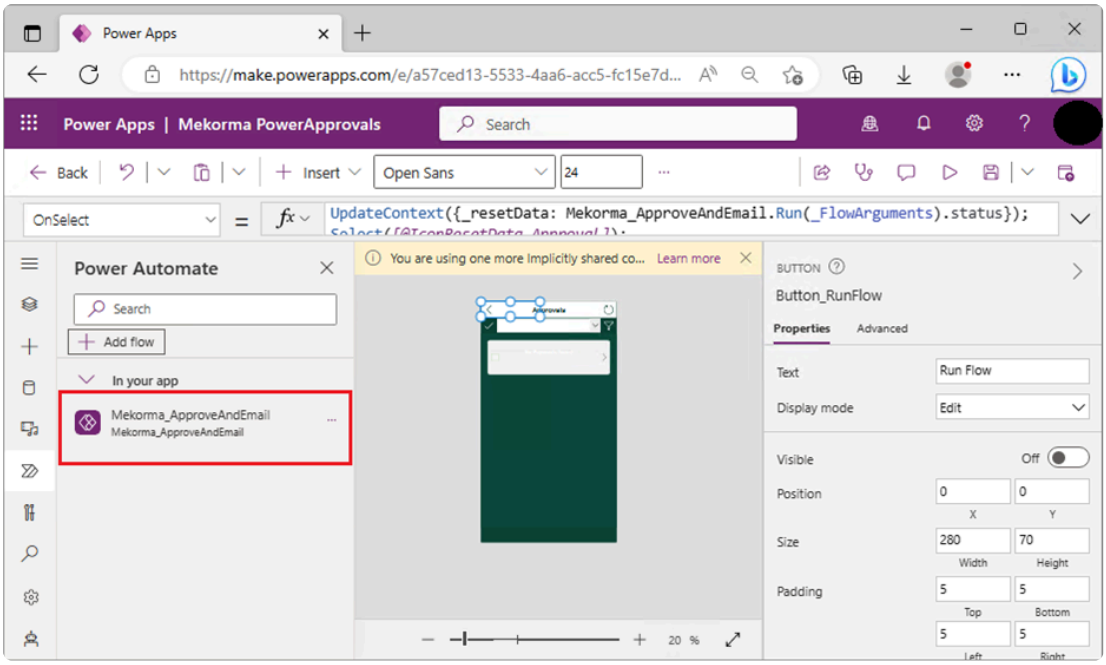
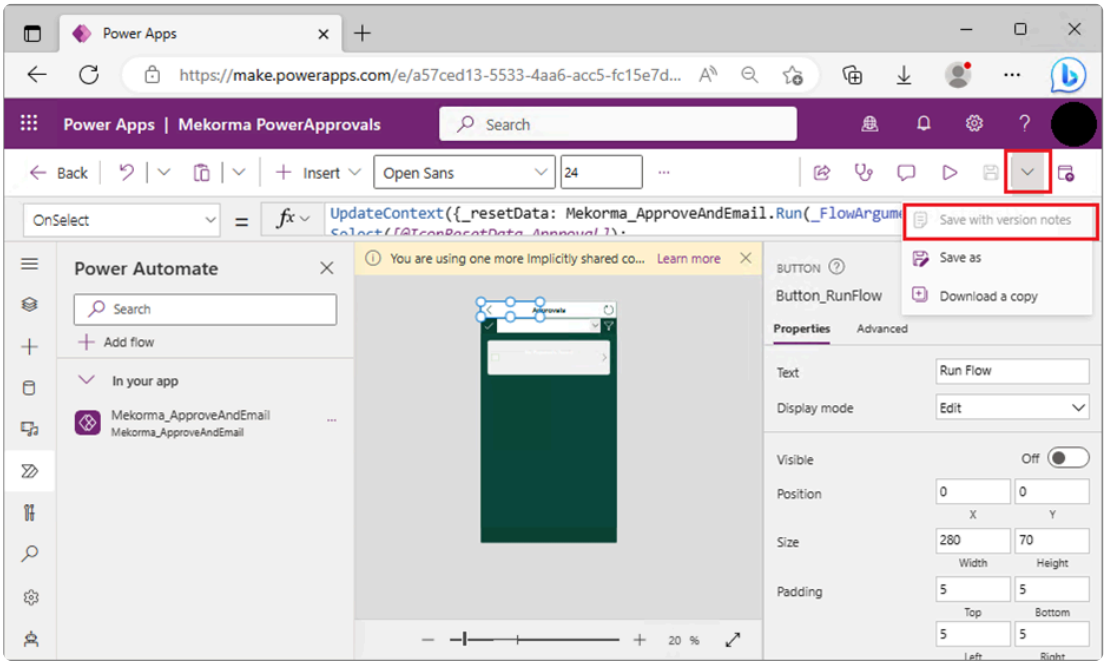


9. In the top right, expand the **Save** button and select **Save with version notes**.



10. Enter any version notes and save.
11. When prompted, click **Publish this version**.

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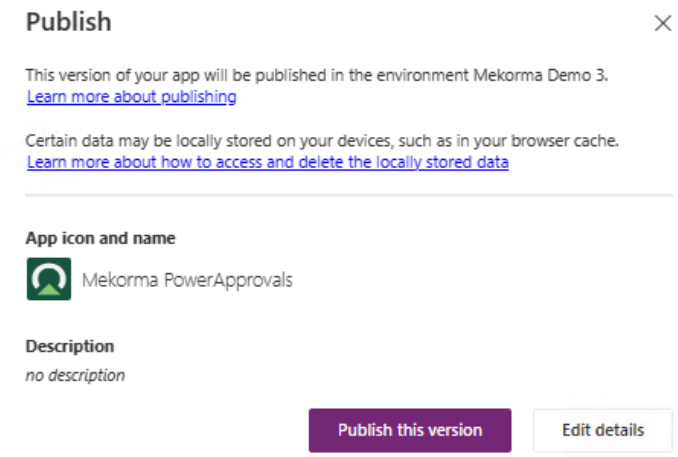
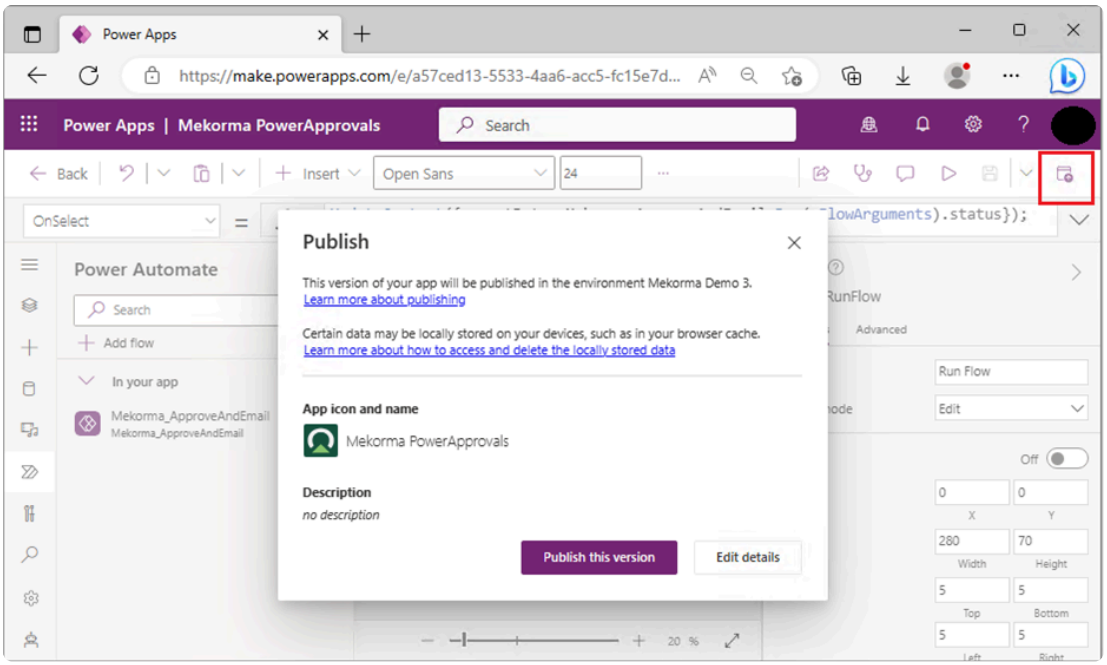


If you are unable to save with version notes, this means the system has already saved the change. If this happens, you will need to publish manually by clicking the publish icon in the top right of the window.



12. Click the **Back** button in the top left and acknowledge yes to leave the page.
13. Next, you need to confirm that the modified application has been published successfully. Click on **Apps** in the left-hand navigation pane.
14. Click the ellipsis (...) to the right of **Mekorma PowerApprovals** and select **Details**.

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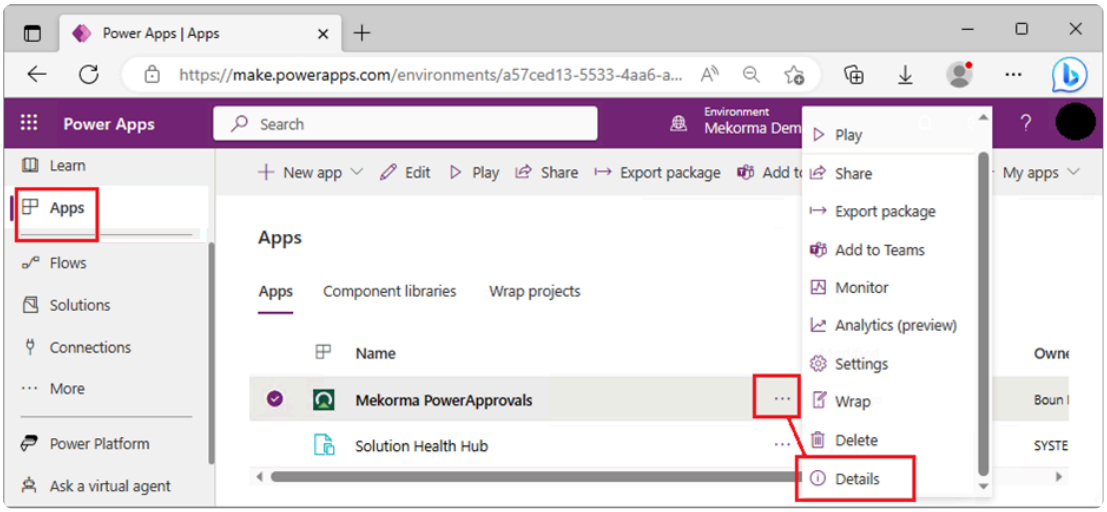
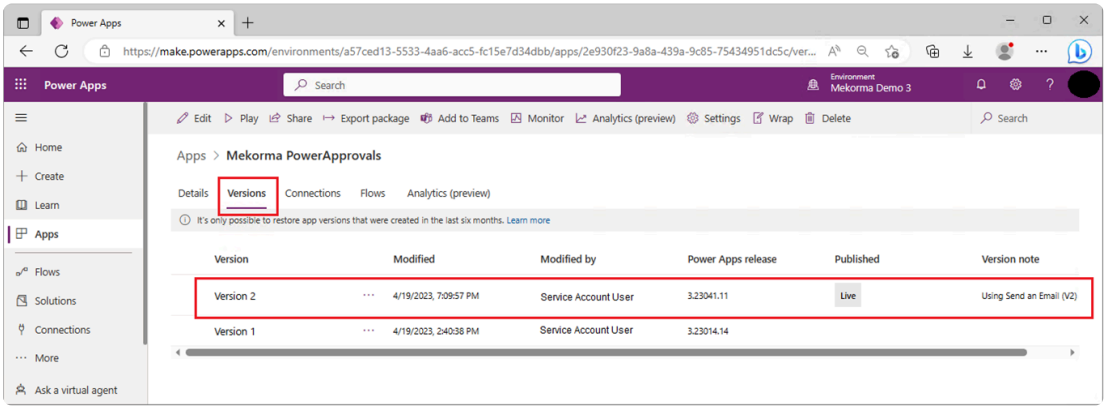


15. Open **Versions** from the header menu to confirm that the modified version has been published. In the example below, the version we modified—Version 2— is live.



Note: If the modified version does not appear, refresh the browser and it will display.

PowerApprovals is ready to use. When an approver approves a batch, a notification email will be sent to the batch requester from the approver.

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15. Mapping Power Apps Approver Accounts to Microsoft Dynamics GP Login Accounts

Mekorma Payment Hub secure approval workflow is an integral part of the requestor’s and approver’s experience. Each approver user must have an account set up in Dynamics GP, with access to the companies where they will be approving, whether they will be logging into Dynamics GP or not.

Approvers must also be assigned to security thresholds that will indicate their approval amount limits. For additional information on task-based security visit Mekorma’s Online User Guide.

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15.1. Setting up Approver Users in Microsoft Dynamics GP

To set up approvers in Dynamics GP, follow the instructions provided in Part 2: User Setup, Chapter 5, “User records” of the Dynamics GP System Setup manual, available with your Dynamics GP installation.

> ✻ Payment approvers can be set up as full or limited users within Dynamics GP. PowerApprovals does not interfere with your Dynamics GP concurrent licensing. You can set up as many approvers as needed without having to acquire additional Dynamics GP licenses.

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15.2. Granting Approver Users Access to Microsoft Dynamics GP Companies

To grant an approver user with access to a Dynamics GP company, follow the instructions provided in Part 2: User Setup, Chapter 6: “Security”. Click on the Setting company access topic, in the Dynamics GP System Setup manual, available with your Dynamics GP installation. Access to companies is required for PowerApprovals to determine what companies to display to approvers.

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15.3. Mapping Approver Users Active Directory Account Accounts to Dynamics GP Logins

PowerApprovals needs to establish a relation between the payment approver's AD account and its corresponding Dynamics GP login. This allows all server-side processes and audit logs to reflect the correct payment transaction approver.

Prerequisites

You must have completed the configuration of secure approval workflow's task-based security with thresholds properly assigned to checkbooks.

> These tasks can be completed in a test company database in Dynamics GP *prior* to rolling out the configurations to your production environment. Please contact Mekorma Professional Services for assistance with these tasks.

Steps

1. Open the **Mekorma Security Maintenance** window in Dynamics GP (Navigation: **Dynamics GP** > **Mekorma** in the left-hand navigation pane > **Setup** > **System** > **Security Setup**).
2. Click on the **>>** icon in the window's toolbar and select **Approval Email Setup**.

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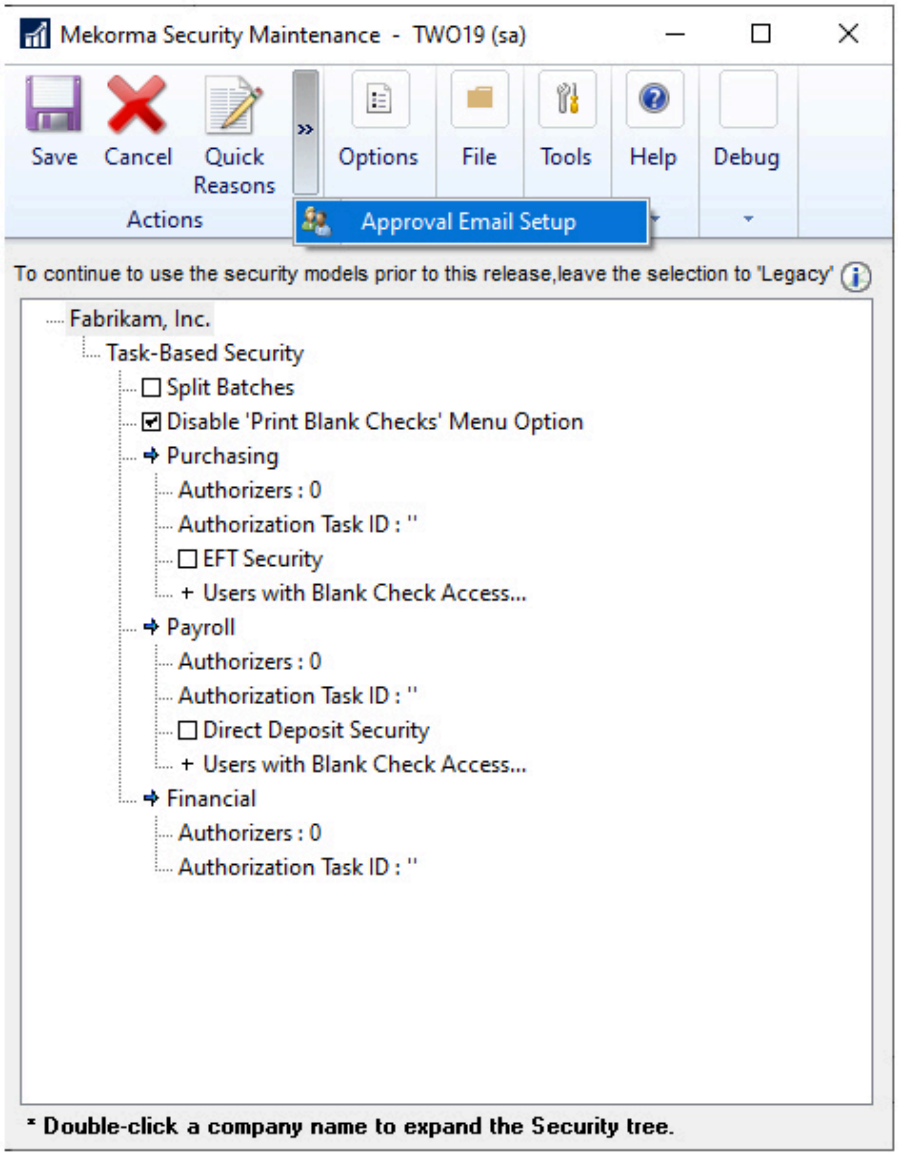

3. In the **Approval Email Setup** window, enter the Azure AD account for each PowerApproval user.

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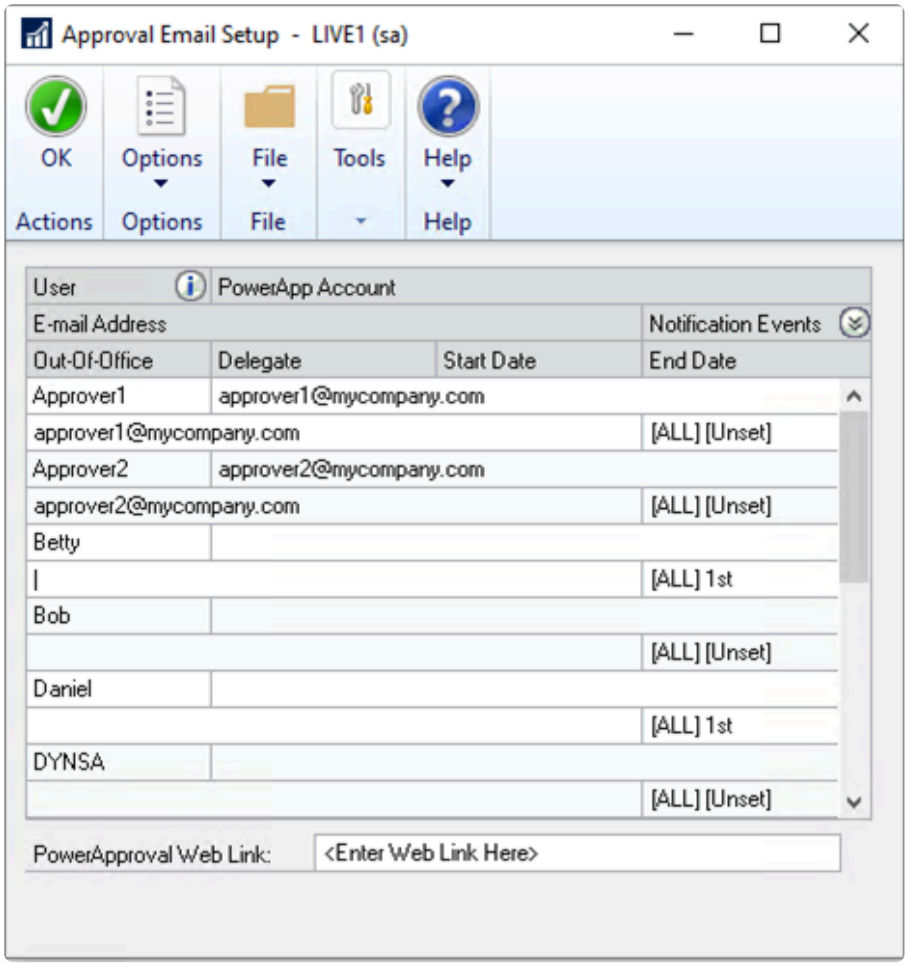

Ensure that you set Notification Events accordingly for users to receive notifications to their preference.

If you are not an Office 365 subscriber and want email notifications to go to a different email server, please enter the email address of each approver in the **E-mail Address** field. This requires PowerApprovals to be set up with the mail connector.

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16. Upgrading Mekorma PowerApprovals

Mekorma delivers new functionality with each product build release. In order to upgrade PowerApprovals, you must follow these procedures.

- Activate the download and install the core Mekorma Payment Hub Product
- Before you upgrade PowerApprovals
- Upgrade Steps

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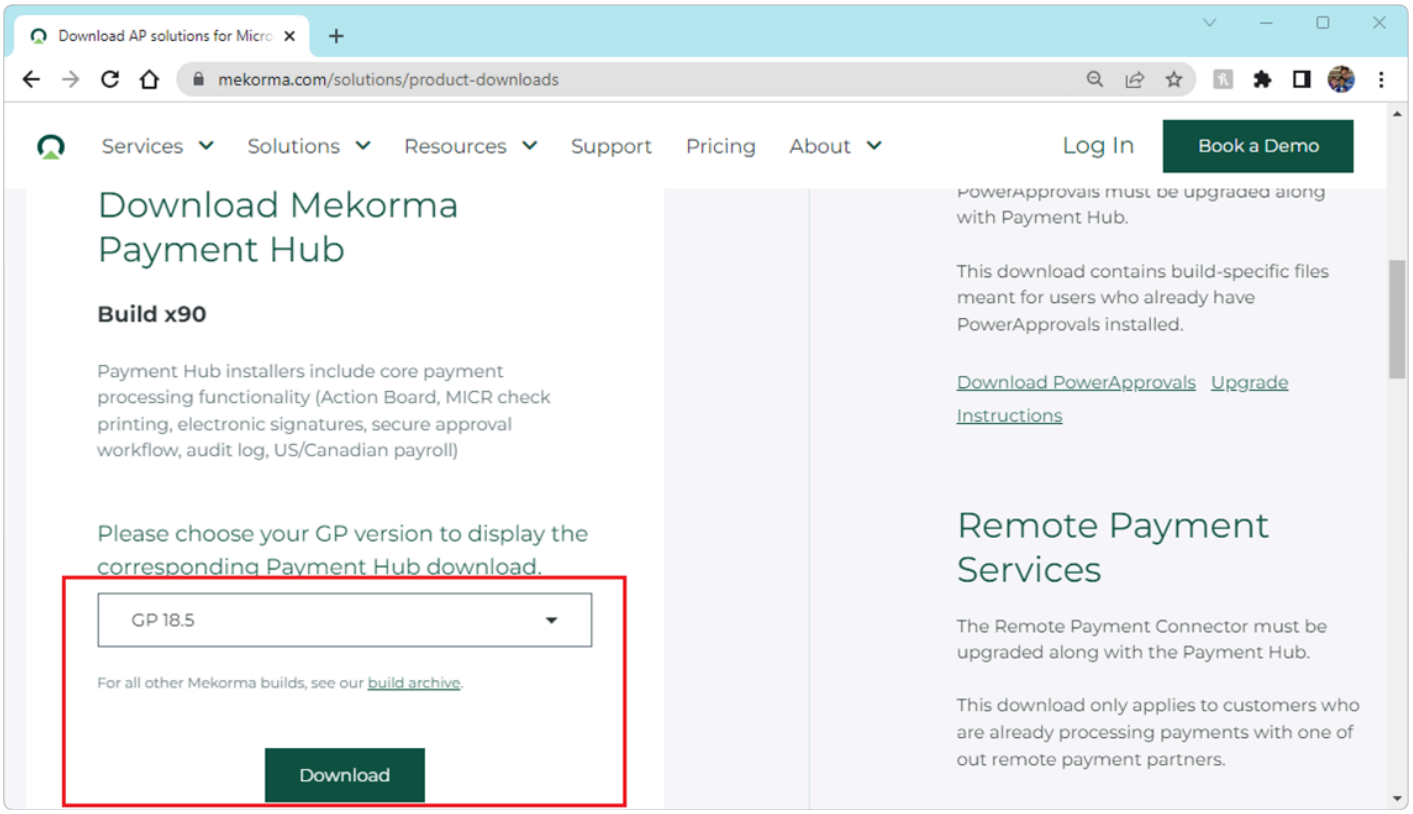
16.1. Downloading and Installing Mekorma Payment Hub

> ! To use PowerApprovals, you must be a current user of Mekorma Payment Hub. For information on installing, please visit the Payment Hub user guide.

Download Mekorma Payment Hub here.



> ✻ Be sure to download the corresponding build of Mekorma Payment Hub for your Dynamics GP version. If you need a past release, visit our Build Archive.

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16.2. Before You Upgrade PowerApprovals

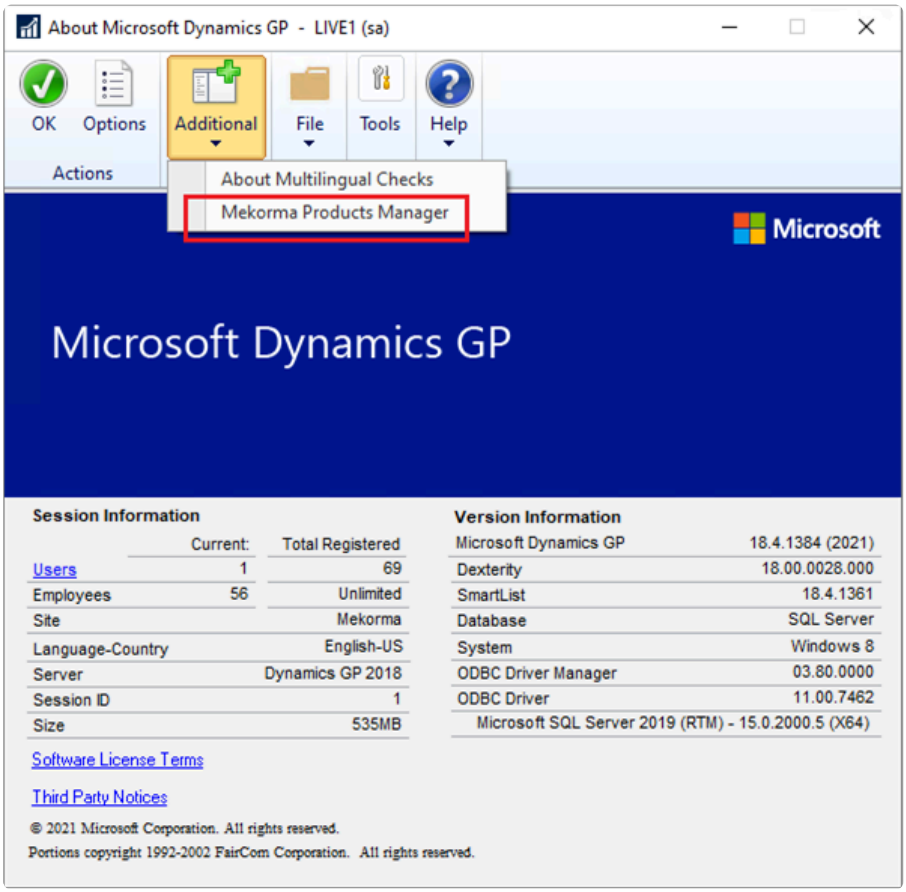
Prerequisites

- Ensure your on-premises data gateway is running and connected to Azure Service Bus.
- Determine which build of Mekorma Payment Hub you are using. This will dictate the build of PowerApprovals that you will need.

Determining your Mekorma Payment Hub build

If you are unsure of which build of Mekorma Payment Hub you are using:

1. In Dynamics GP, open the **About** window.
2. Select **Mekorma Products Manager** from the **Additional Menu**.



3. In the **About Mekorma Products Manager** window, the build number is visible as the left-most number in the second column of numbers (as highlighted below).

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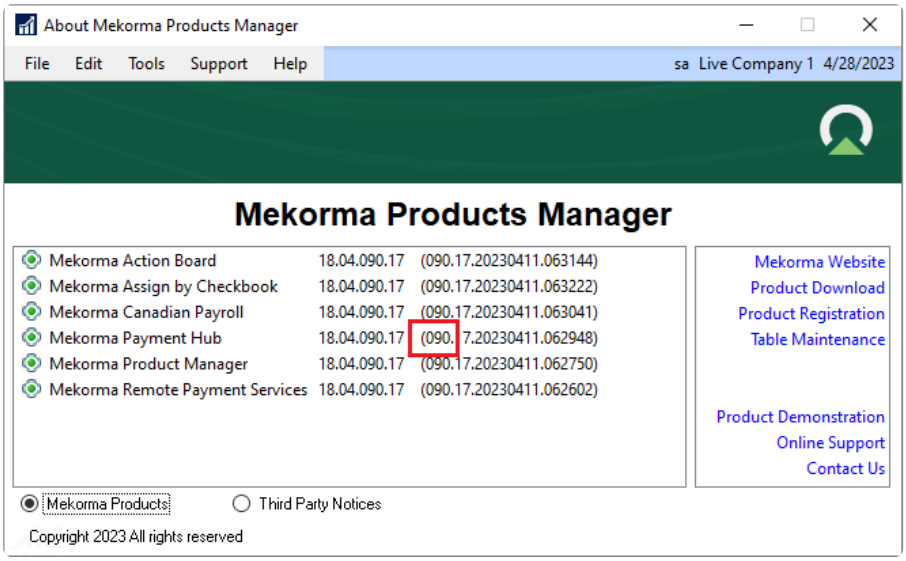
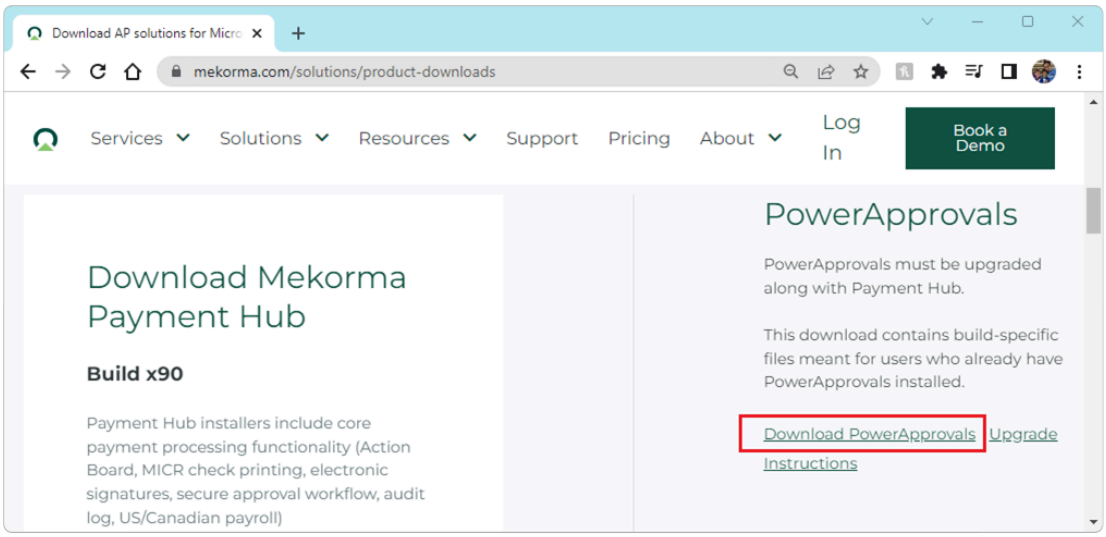


Downloading PowerApprovals

1. Download the build of PowerApprovals that corresponds to your Payment Hub build number. PowerApprovals functionality is build-specific unless otherwise noted in our product release notes.
2. Download the latest PowerApprovals package by click the **Download PowerApprovals** link on the Product Downloads page of our website.



3. If you need a past release, visit our Build Archive, located at the bottom of the Product Downloads page.

> If you have several Power Apps environments, please ensure you select the correct environment prior to initiating the import steps.

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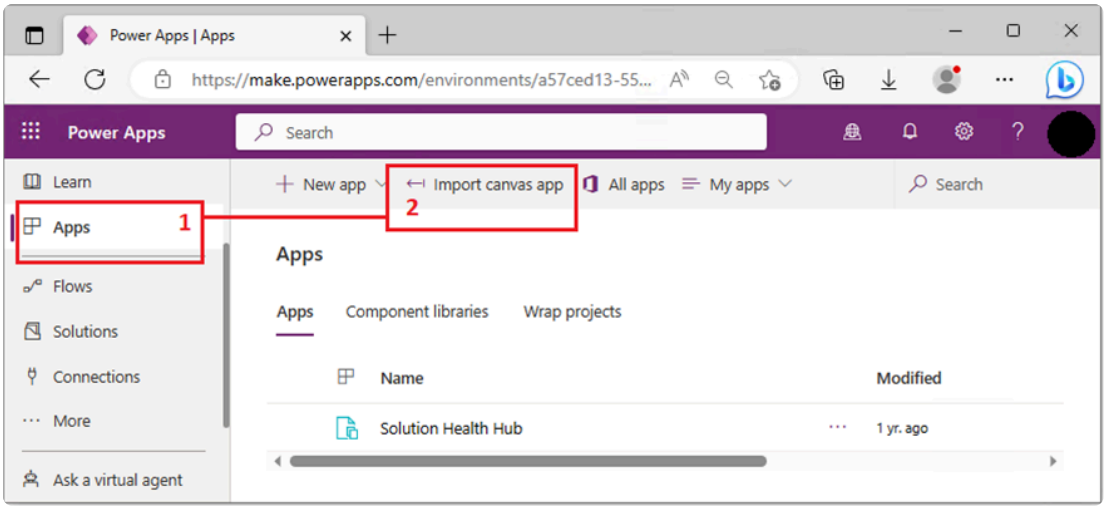
16.3. Upgrade Steps

Whenever you upgrade your Mekorma Payment Hub build, you also need to upgrade PowerApprovals. Upgrading both Payment Hub and PowerApprovals provides the latest features and security updates.

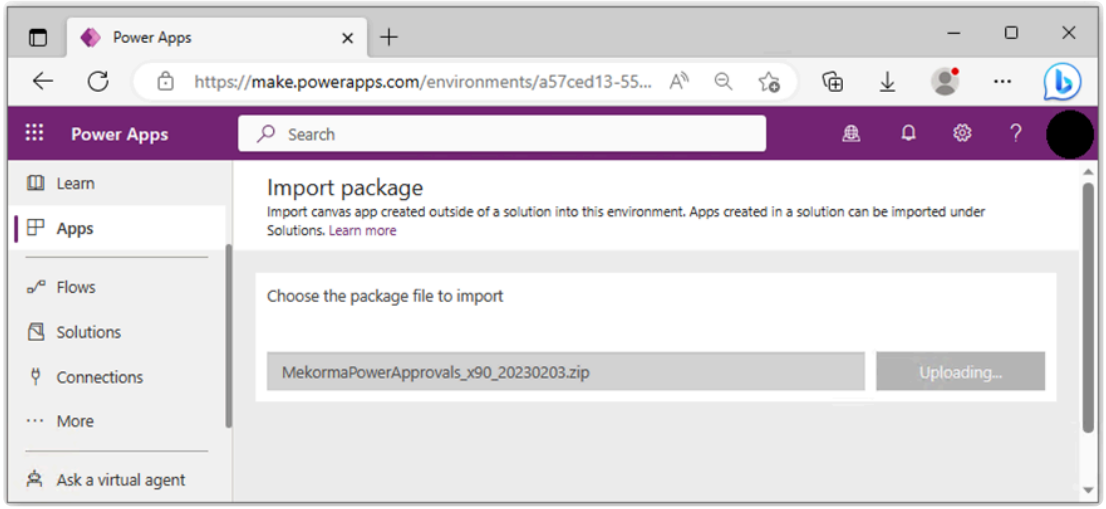
> ! When upgrading, you must be logged into the Power Apps environment as the Service Account user.

Upgrade PowerApprovals

1. Open your browser in incognito mode, go to Microsoft Power Apps, and log in as the service account user.
2. Click on **Apps** in the left-hand navigation bar and select *Import canvas app*.



3. In the screen that appears, click **Upload** to select the PowerApprovals zip file. Click **Open** to begin the upgrade process.



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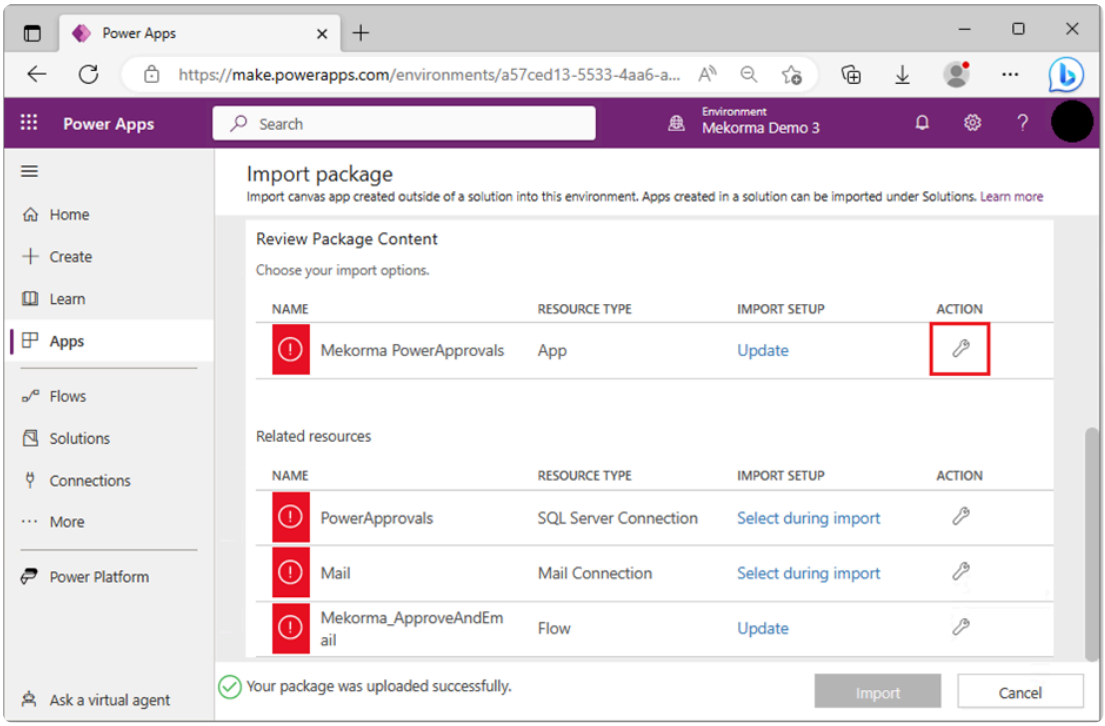
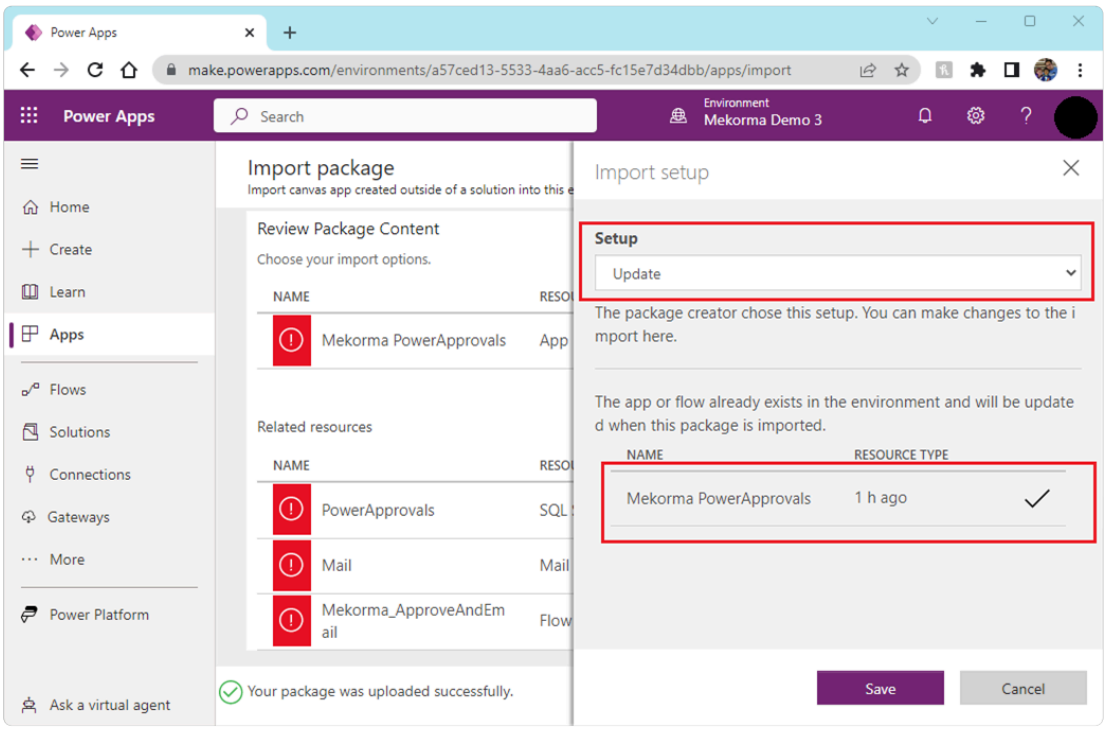
4. Once the import is finished, you need to set up the app. Click the wrench icon for the Mekorma PowerApprovals app.



5. In the **Import setup** window, in the **Setup** drop-down, ensure it is set to **Update**. Select **Mekorma PowerApprovals** in the lower section. A checkmark will appear once selected. Click **Save** to finalize the change.



6. To set up the SQL Server connection, click the wrench icon for PowerApprovals.

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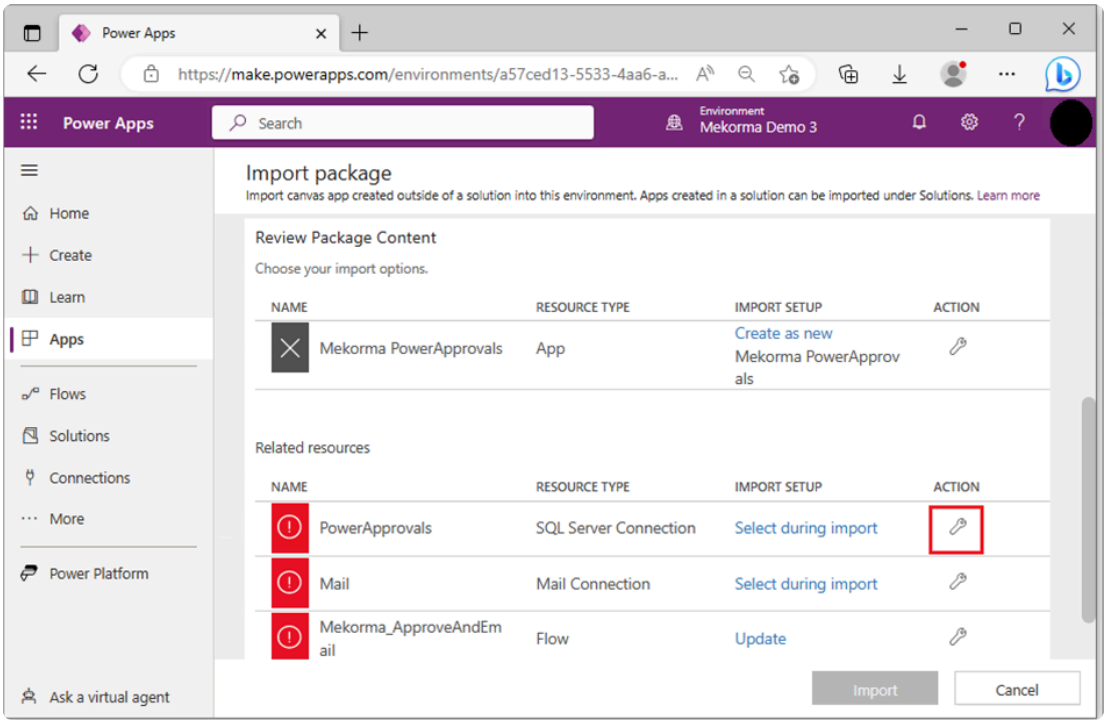
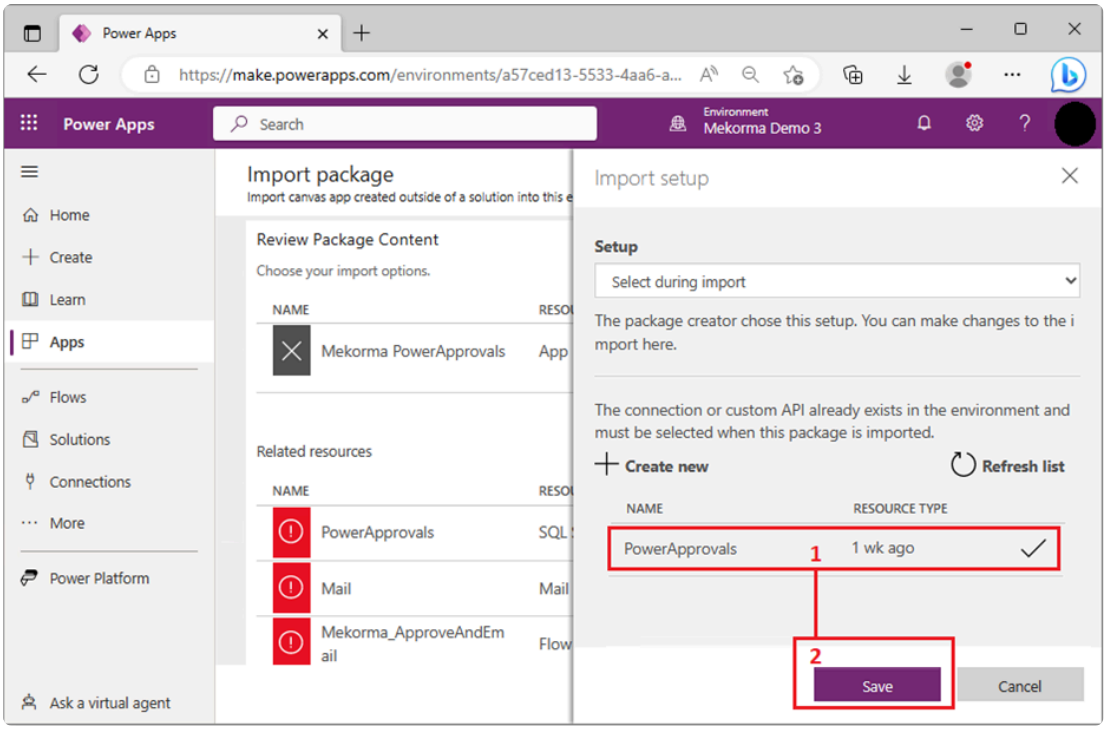


7. In the **Import setup** window, change the **Setup** drop-down option to **Select during Import** and select the SQL Server connector. Click **Save** to finalize the setup.



Upgrade the Mail Connector

1. To set up the mail connection, click the wrench icon to the right of the Mail resource.

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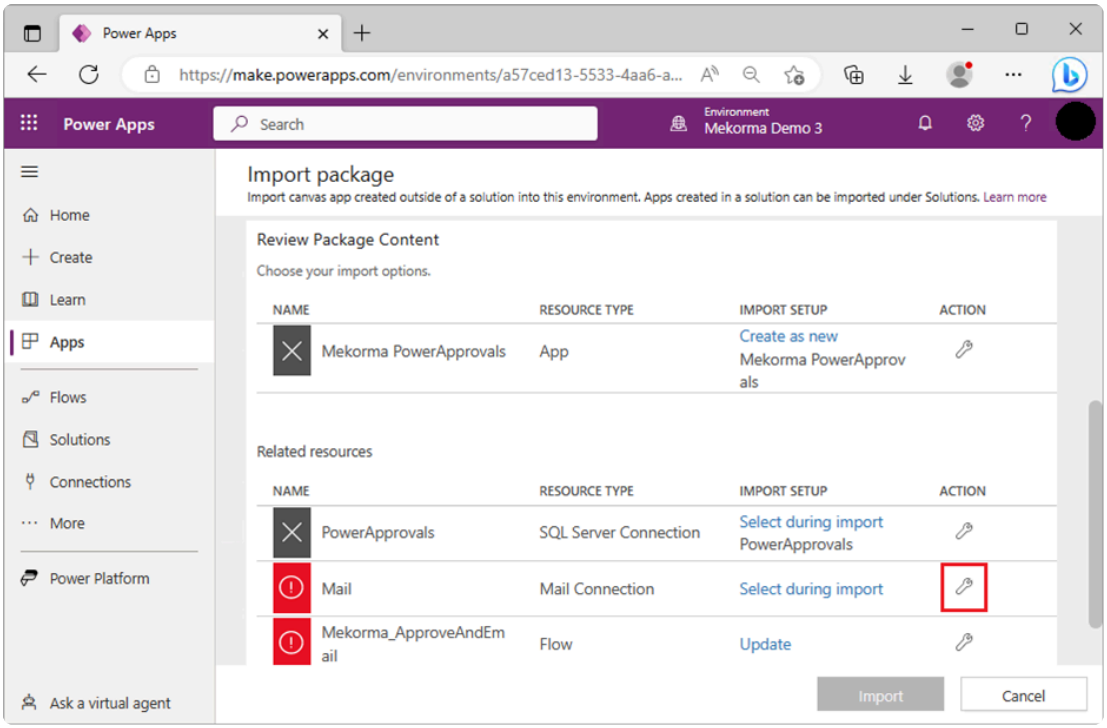
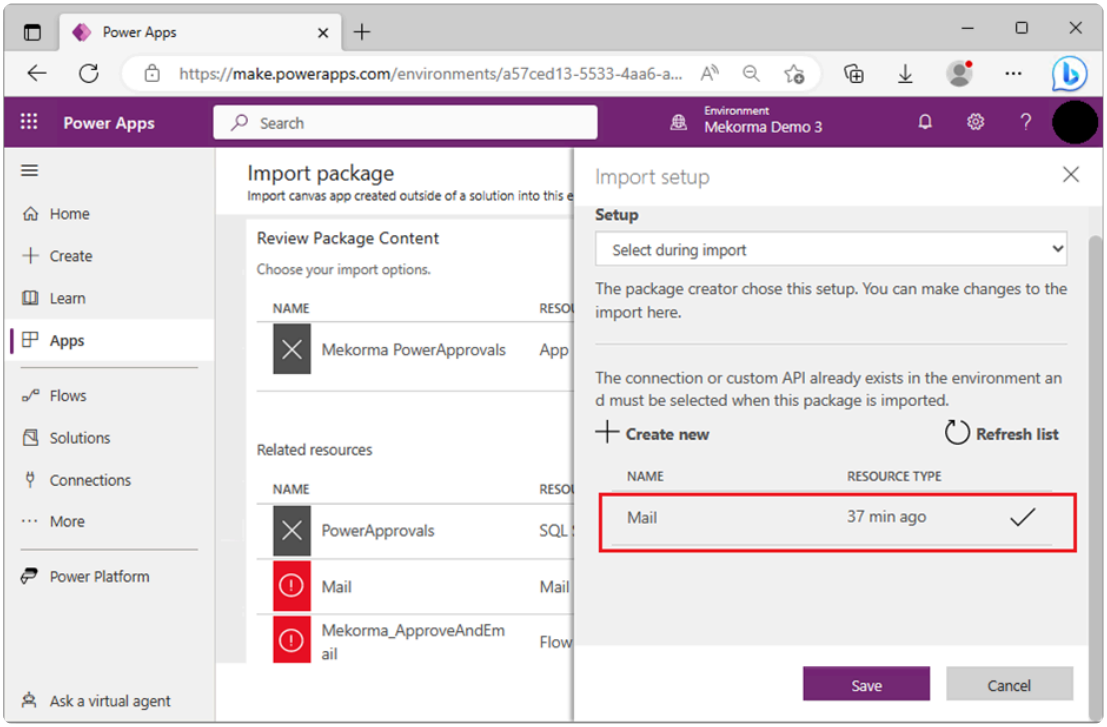


2. In the **Import setup** window, in the **Setup** drop-down, ensure it is set to **Select during import**. Select **Mail** in the lower section. A checkmark will appear once selected. Click **Save** to finalize the change.



Upgrade the Flow

1. To set up the flow, click the wrench icon to the right of the Mekorma_ApproveAndEmail resource.

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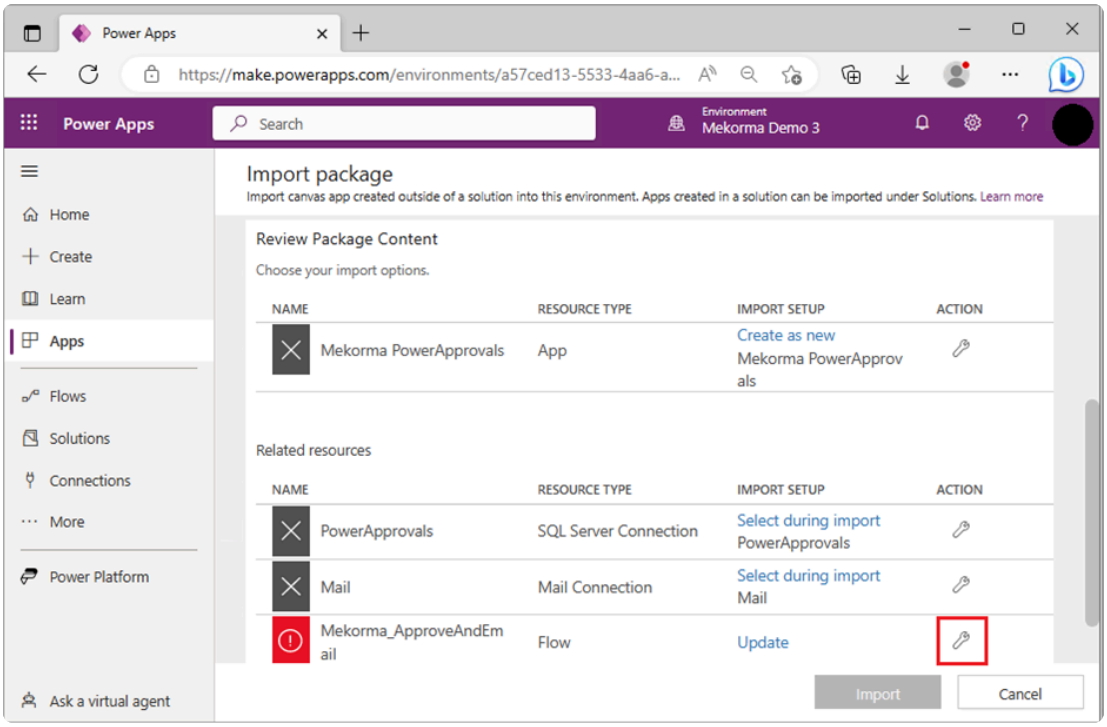
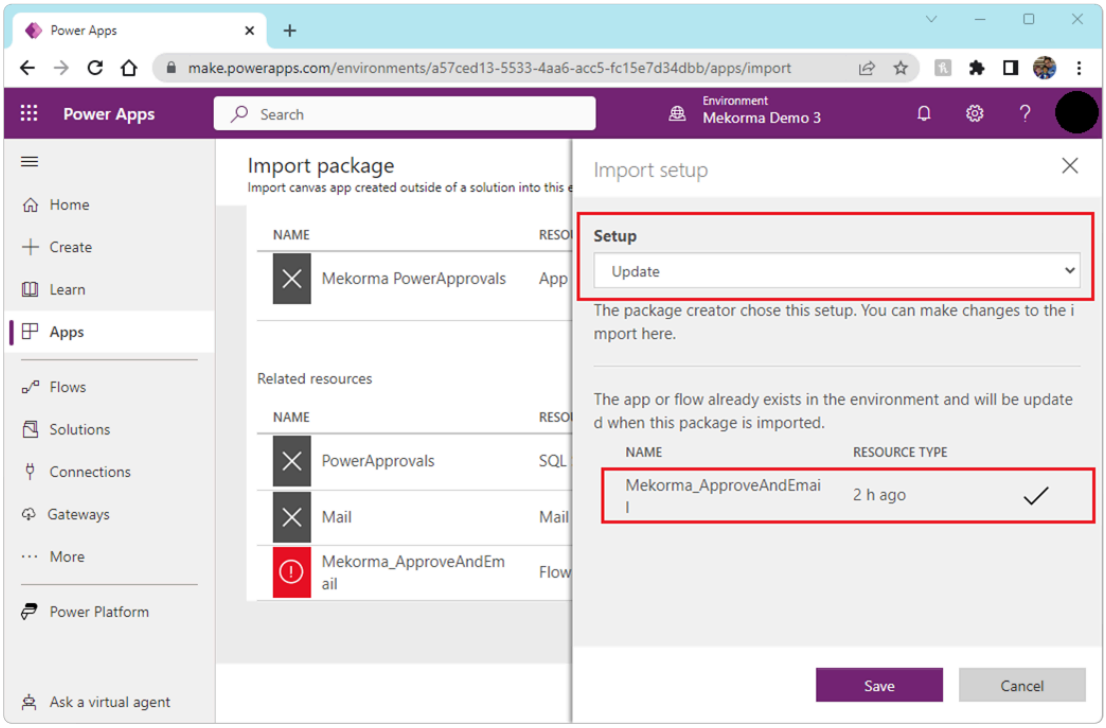


2. In the **Import setup** window, in the **Setup** drop-down, ensure it is set to **Update**. Select **Mekorma_ApproveAndEmail** in the lower section. A checkmark will appear once selected. Click **Save** to finalize the change.



Finalizing the Upgrade

1. When you are ready to finalize importing PowerApprovals, your window should look like this:

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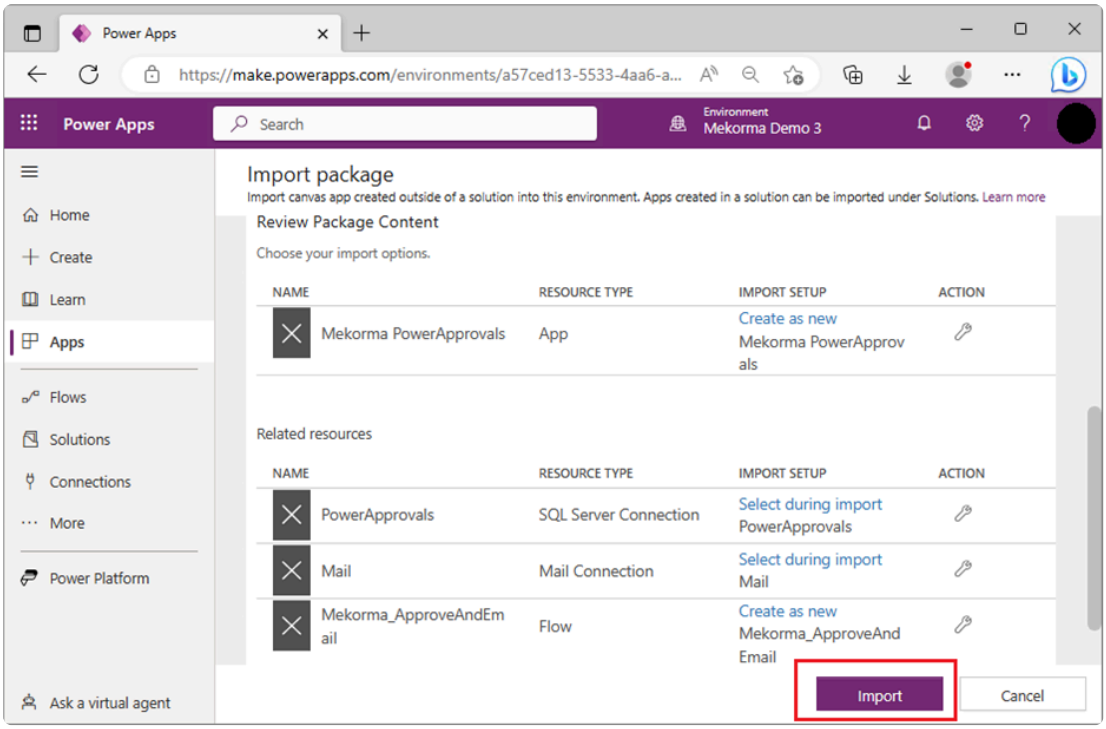
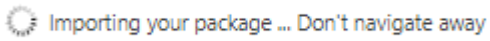
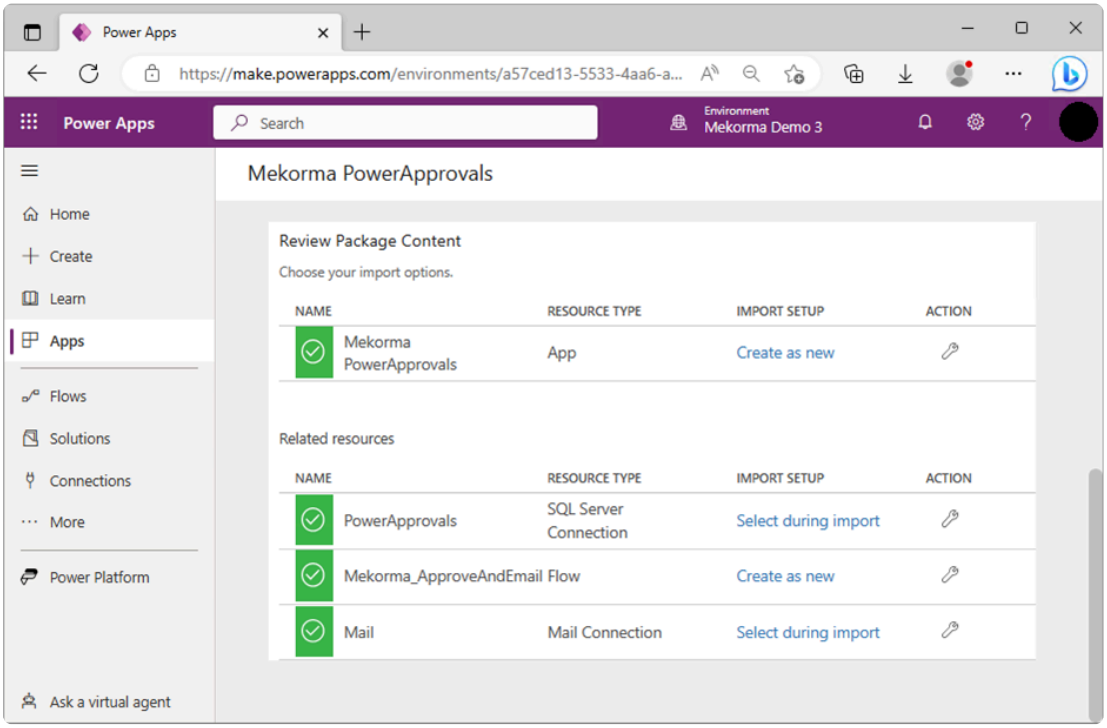


2. Click **Import** to finalize the setup. Allow the system to finish importing; the process will take a few minutes and you will see this status while it is working.



3. Once the import is complete, the resources on your page will be updated with a green checkmark next to them.



4. Open **Apps** to verify that PowerApprovals has been imported into your Power Apps

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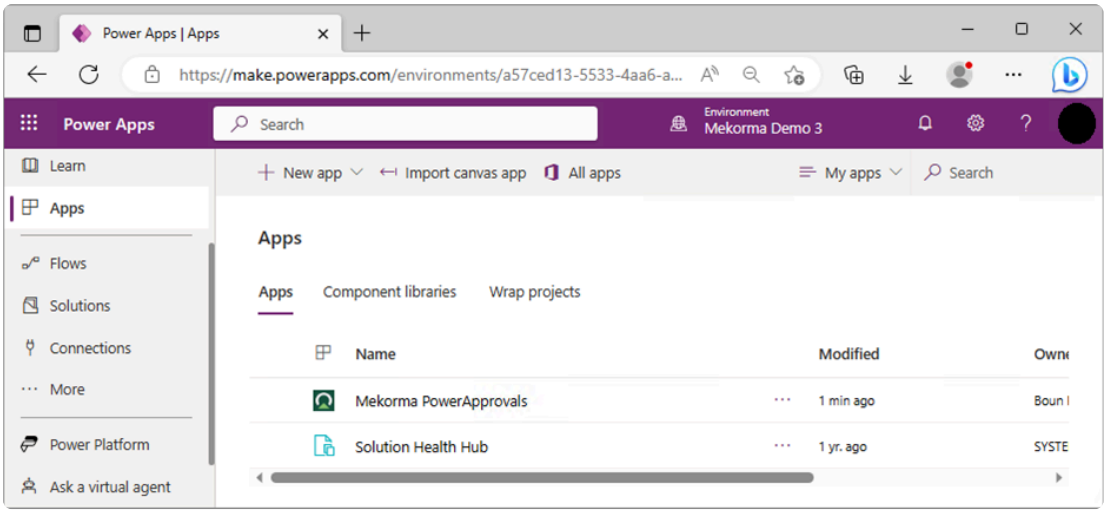
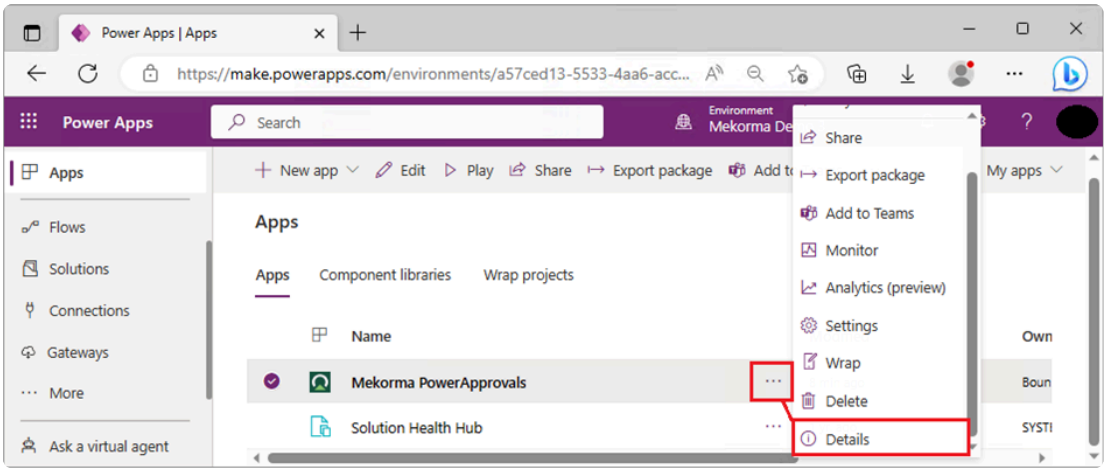
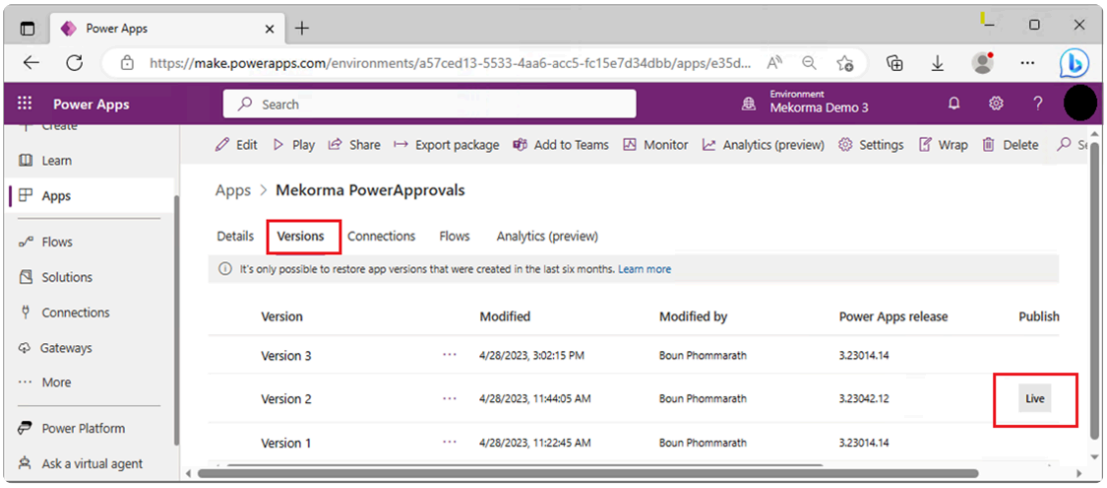
environment.



5. PowerApprovals has been upgraded, and is now ready to be published. Open the Mekorma PowerApprovals **Details** by clicking the ellipsis to the right.



6. In the **Versions** tab, you can see the various versions of the app, including the published one, which is marked **Live**. In this example, version 2 is live, while version 3 is the most recent. We need to publish version 3 to make it live (this will also unpublish version 2).



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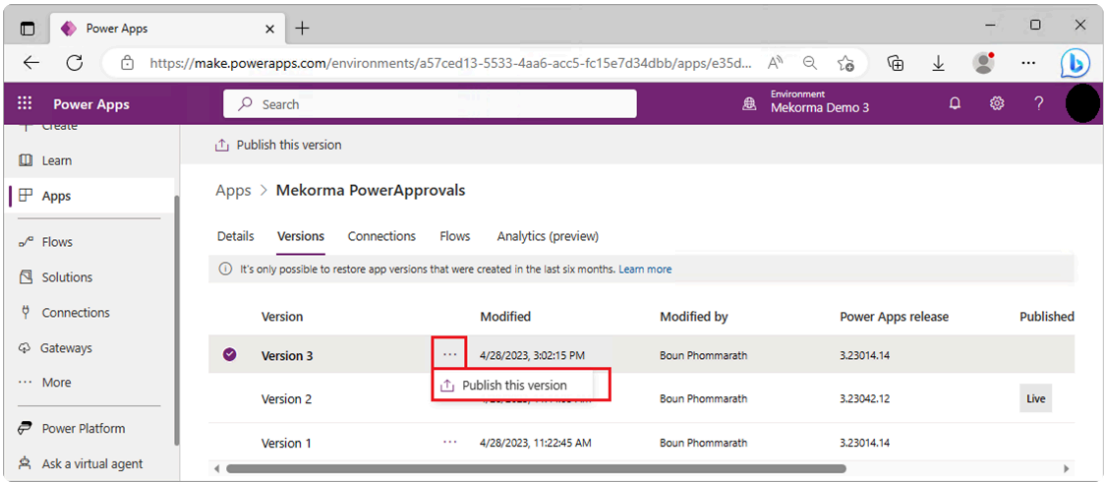
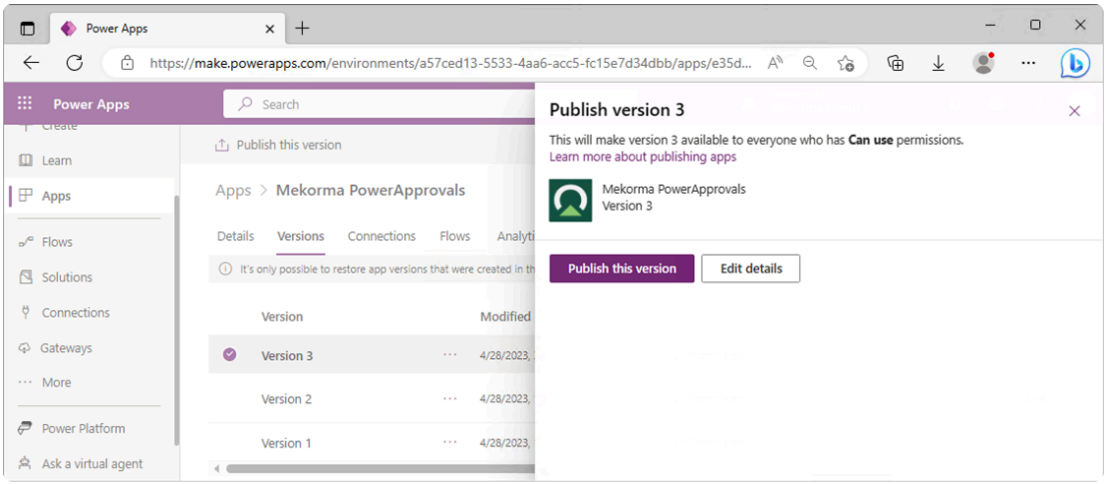
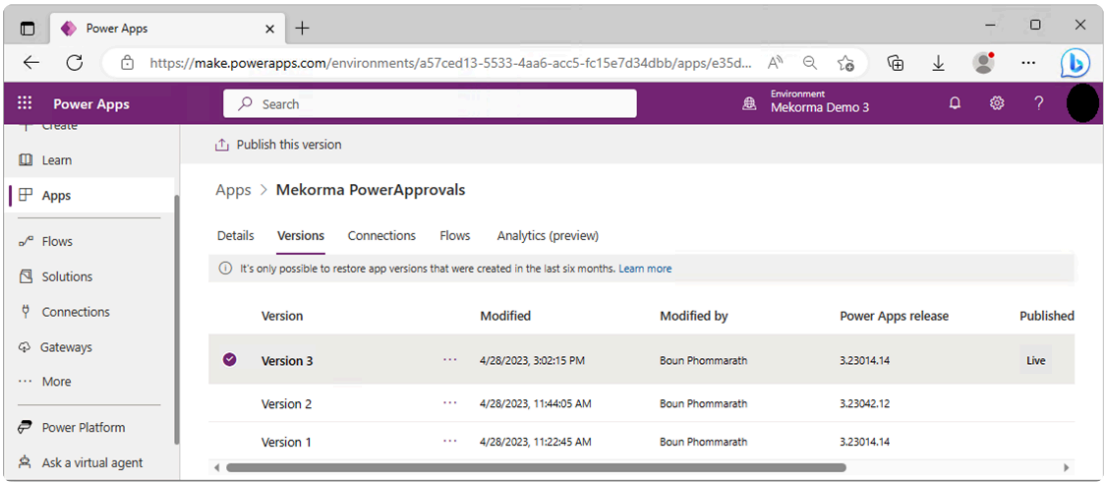
7. Publish the latest version by clicking the ellipsis and selecting **Publish this version**.



8. Finalize the upgrade by clicking **Publish this version** when prompted. This sets the latest version to be live.





Note: The upgrade is complete and ready for end users. For clients that use Office 365, there are additional steps in order to receive emails from approvers instead of the system. PowerApprovals sends email notifications to batch requesters from Microsoft's Power Apps system by default.

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- For example, if Betty approves a batch, the *system* will send an email to Bob—the batch requester—instead of from Betty directly.

For clients who prefer these messages to come from the *approver* instead of the system, follow the instructions in Section 14.2, Updating PowerApprovals with the Modified Flow.

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