

Check before Starting Carry Forward:

1. **Have all Employees in a Department:** Are all employees in a Department? Only those in a Department get carried forward via the Cloud Flow "Carry Forward Department". If you have employees who aren't in Department, it's possible to individually trigger the carry forward for each of them via the Cloud Flow "Carry Forward Employee".
2. **Ensure correct hierarchy:** Make sure that your Departments have the field "parent department" filled. Of course the highest department, usually something like CEO/Management, has it not filled. Use the Flow on the hierarchical highest department.
3. **Only active Employees with valid Employment Terms for next year are carried over:** Employees you want to carry forward need to be active (Status = Active) and have a valid Employment Contract in the year you want to carry forward. So either no End Date or End Date at least 1.1. of the following year (e.g. Carry Forward from 2022 -> 2023 = 2023 1.1.2023 is the earliest end date if it is to be taken into account by the carry forward).
4. **Ensure correct values on Absence Type Settings:** Make sure each and every Absence Type you want to carry forward to the following year is marked as "Process Carry Forward" = yes in the Absence Type Settings. Make sure the Absence Types you do **not** want to carry over are set to "Process Carry Forward" = no.
See this guide: <https://www.dynamics-hr-management.com/en/learn/hr-for-dynamics-absence-type-settings.htm>
5. **No open Leave Requests:** Make sure your data maintenance is correct. Esp. that all Leave Requests are dealt with by either approving them or rejecting them. Cancel Leave Requests that didn't happen for whatever reason.
6. **Ensure correct values for Leave Entitlements:** Only Leave Entitlements that have the following conditions will be carried over:
 - a. **Absence Type Settings** for the particular Absence Type = "Process Carry Forward" = yes
 - a. **End Date** is the last day of the Vacation year (e.g. 31.12.2022 if you want to carry forward to 2023)
 - b. **Transfer Until** is in the new year. Usually it is 31.03.2023, so 3 Month into the new year.
 - c. **Process Remaining** = Transfer to new period
 - d. **Remaining** does not equal 0 (can be positive or negative)
 - e. Employee **Status** = Active
 - f. Employee has a valid **Employment Term** in the new year

Vacation - 5.50 Saved

Be aware, this is an example. Your "transfer until" might differ. Also your Absence type. Make sure to not just copy this but think if these are correct for your organisation.

General Related

Absence Type	Vacation	Entitlement	5,50	Process Remaining	Transfer to new period	Entitlement Type	New Entitlement
Time Unit	Days	Taken	3,00	Process Remaining Status	Pending	Provisioning Type	Employment Terms Entitlement
Start Date	01.01.2022	Offset	---	Origin of Leave Entitlement	Employment Term	Description	---
End Date	31.12.2022	Remaining	2,50				
Transfer Until	31.03.2023						

Employee: Tester, a

Leave Summary: a Tester 2022-01-01 To 2022-12-31

Name: Vacation - 5.50

Owner: Admin HubP503

The Leave Summary should have the field "Remaining" set to a value that is not zero, positive or negative. If it is 0, nothing will get carried over. Troubleshooting: check if really have your values correct for the entitlement (See above Ensure correct values for Leave Entitlements)

a Tester 2022-01-01 To 2022-12-31 - Saved

Leaves Summary

General Related

Name: a Tester 2022-01-01 To 2022-12-31

Employee: Tester, a

Absence Type: Vacation

Start Date: 01.01.2022

End Date: 31.12.2022

Owner: Admin HubP503

Absence	Origin of Leave Entitlement	Entitlement	Taken	Offset	Remaining	Time Unit	Start Date	End Date	Transfer In	Description
Vacation	Employment Term	7,50	0,00		7,50	Days	01.10.2022	31.03.2022		
Vacation	Employment Term	15,00	0,00		15,00	Days	01.01.2022	31.03.2022		gesetzlich
Vacation	Employment Term	5,50	3,00		2,50	Days	01.01.2022	31.12.2022		
Vacation	Booked out Carried Forw...	-15,00			-15,00	Days	01.01.2022	31.12.2022		

Entitlement: 13,00

Taken: 3,00

Remaining: 10,00

Time Unit: Days

Considered for Transfer: 10,00 if this is 0, nothing will get transferred to the next period.

Carry Forward Processed: No

- Update to the newest Rollup Version** available. See update guide (click on link on this page, no direct link as update guide is subject to change): <https://portal.hr-for-dynamics.com/en-US/downloads/>

Remember you have to be invited to the Customer Portal. Up to two invites per customer, this includes partners.

If you are eligible and haven't been invited yet, request invitation here:

Please send a mail to request-portal-invite@hubdrive.com with the email addresses of up to 2 users who should be granted access. One or both of these users can be users of a partner.

- Make sure to have installed the newest Cloud Flow Solution. Currently it needs to be **at least 41011**. There might be a new version after this guide comes out. Always install the newest version.

<https://portal.hr-for-dynamics.com/en-US/downloads/>

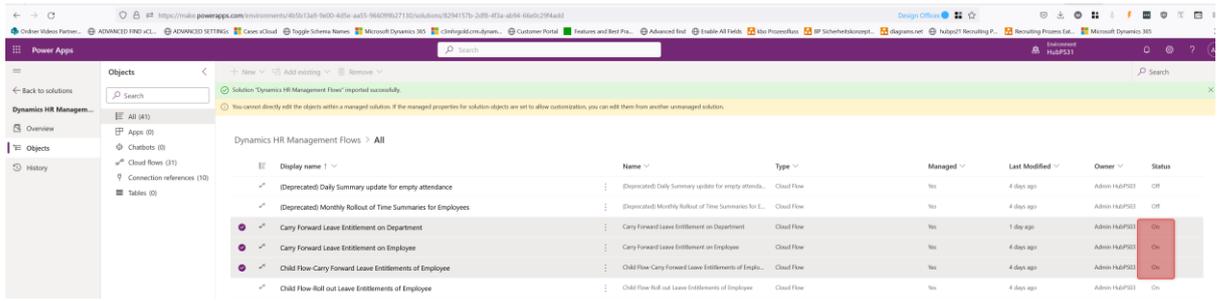
- Activate those Cloud Flows**

Open make.powerapps.com and navigate to the correct Solution: Dynamics HR Management Flows.

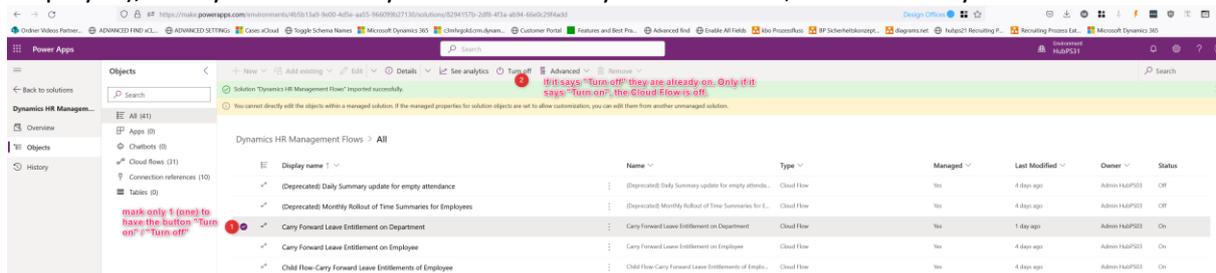
Display name	Name	Created	Version	Managed	Publisher	Solution check
Plugin Profiler	PluginProfiler	1 month ago	2.0.0.0	Yes	IBM Developer Tools	Checked by publisher
Test Time Clock	TestTimeClock	1 month ago	1.0.0.0	No	Hubdrive	Hasn't been run
Dynamics HR Management Flows	HubP503	4 months ago	5.0.17004.1	Yes	Hubdrive	Checked by publisher
Self-Canceling of Leave Requests - today or aft...	SelfCancelingLeave	5 months ago	1.0.0.0	No	Hubdrive	Hasn't been run
Test	Test	5 months ago	1.0.0.0	No	Hubdrive	Hasn't been run
Hubdrive - Feature Work Pattern Activation	emp_work_pattern...	6 months ago	1.0.0.0	No	Hubdrive	Hasn't been run
Hubdrive - Time Account Feature Activation	emp_time_account...	7 months ago	1.0.0.0	No	Hubdrive	Hasn't been run
HR customizations	HRCustomizations	6 months ago	1.0.0.0	No	Default Publisher for...	Hasn't been run
Recruiting Portals	RecruitingPortals	6 months ago	1.0.0.0	No	sHRT Business S&A...	Checked by publisher
Dynamics 365 Portal - Custom Portal	StartersPortal	6 months ago	9.1.2051.22	Yes	Microsoft	Checked by publisher
Dynamics 365 Portal - Application component...	PortalProfile	6 months ago	9.1.2108.0	Yes	Microsoft	Checked by publisher
Dynamics 365 Portal - Web Forms for applica...	MicrosoftWebForms	6 months ago	9.1.2108.0	Yes	Microsoft	Checked by publisher
Dynamics 365 Portal - Portal Application Base	MicrosoftConfPortal	6 months ago	9.1.2001.0	Yes	Microsoft	Checked by publisher
Dynamics 365 Portal - Portal Application Depe...	MicrosoftConfPortal	6 months ago	9.1.2001.0	Yes	Microsoft	Checked by publisher
Dataverse Base Portal	CDSDataversePortal	6 months ago	9.1.2001.22	Yes	Microsoft	Checked by publisher
Dynamics 365 Portal - Base HTML Editor	basehtmleditor_portal	6 months ago	9.1.10.12	Yes	Dynamics 365	Checked by publisher
Dynamics 365 Portal - Web Notification	WebNotification	6 months ago	9.1.10.0	Yes	Microsoft	Checked by publisher
Dynamics 365 Portal - Bot	MicrosoftPortalBot	6 months ago	9.1.2101.1	Yes	Microsoft	Checked by publisher
Dynamics 365 Portal - Timeline	MicrosoftPortalTimeline	6 months ago	9.1.2001.1	Yes	Microsoft	Checked by publisher
Dynamics 365 Portal - Azure Storage	MicrosoftPortalAzure	6 months ago	9.1.2100.0	Yes	Microsoft	Checked by publisher
Dynamics 365 Portal - Feedback	Feedback	6 months ago	9.1.2100.0	Yes	Microsoft	Checked by publisher
Dynamics 365 Portal - Advanced Forms	MicrosoftPortalAdvancedForms	6 months ago	9.1.2001.2	Yes	Microsoft	Checked by publisher

Make Sure all 3 of them are on. Turn them on in **this order**:

- Child Flow-Carry Forward Leave Entitlement on Employee
- Carry Forward Leave Entitlement on Department
- Carry Forward Leave Entitlement on Employee



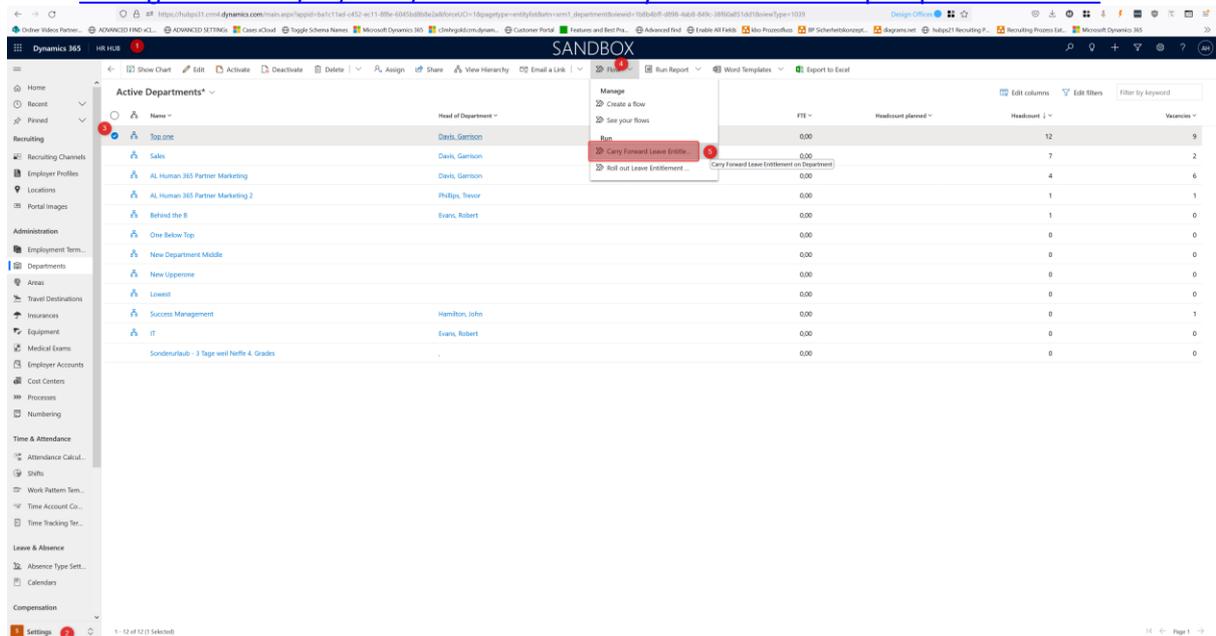
Turn on each cloud flow one by one (start with Child Flow-Carry Forward Leave Entitlement on Employee), if they aren't already turned on. If they are turned on, the button says "Turn off".



10. After all points have been successfully completed, Start the Carry Forward.

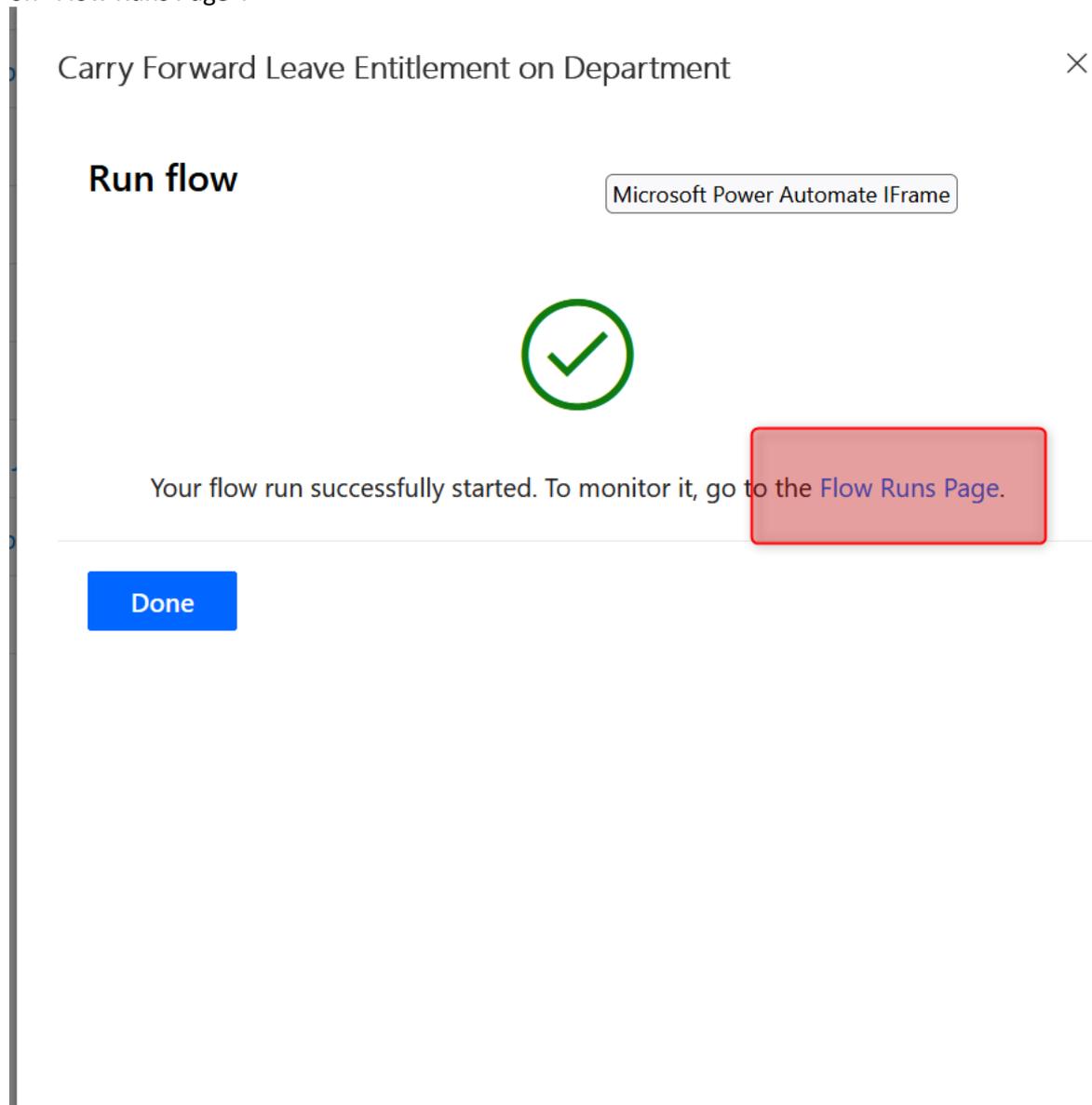
Please be aware: you can only carry forward if the year you are trying to carry forward from, is finished. E.g. you can only carry forward to 2024 earliest 1.1.2024.

Please carefully read this this Guide and make sure that you click the hierarchical highest Department first before clicking on the flow: <https://www.dynamics-hr-management.com/en/learn/microsoft-hr-for-dynamics-base-setup-departments.htm>

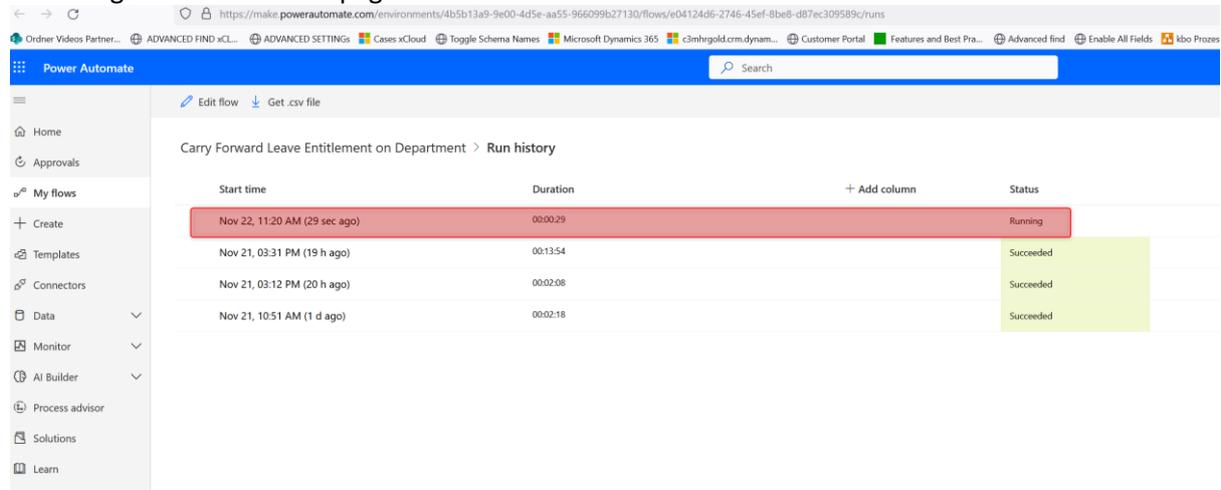


Check if all Carry forwards worked:

After you triggered the Cloud Flow "Carry Forward Leave Entitlement on Department", please click on "Flow Runs Page":



You will get redirected to a page that looks similar to this:



After this is finished, log into make.powerapps.com and click on "Child Flow-Carry Forward Leave Entitlements of Employee", a different flow then the one above, to see if you have any error. This child flow does the actual Carry Forward.

The Parent Flow "Carry Forward Leave Entitlement on Department" just prepares a list of all Employees that will get carried forward.

You will have 1 record in the 28-day-run history per Employee that was carried forward:

The screenshot shows the Power Apps interface for a flow named "Child Flow-Carry Forward Leave Entitlements of Employee". The details section shows the flow is "On", created on Dec 2, 04:04 PM, and modified on Nov 17, 11:06 AM. The 28-day run history table shows 10 successful runs with durations ranging from 00:00:04 to 00:00:54.

Start	Duration	Status
Nov 22, 11:23 AM (11 sec ago)	00:00:04	Succeeded
Nov 22, 11:22 AM (40 sec ago)	00:00:08	Succeeded
Nov 22, 11:22 AM (1 min ago)	00:00:08	Succeeded
Nov 22, 11:21 AM (1 min ago)	00:00:15	Succeeded
Nov 22, 11:21 AM (2 min ago)	00:00:07	Succeeded
Nov 22, 11:20 AM (2 min ago)	00:00:16	Succeeded
Nov 21, 03:45 PM (19 h ago)	00:00:04	Succeeded
Nov 21, 03:44 PM (19 h ago)	00:00:03	Succeeded
Nov 21, 03:35 PM (19 h ago)	00:00:54	Succeeded
Nov 21, 03:35 PM (19 h ago)	00:00:04	Succeeded

Trouble Shooting:

- Make sure all the carry forward Cloud Flows have a valid connection:

The screenshot shows the Power Apps interface for a flow named "Carry Forward Leave Entitlement on Department". The details section shows the flow is "On", created on Dec 8, 09:25 AM, and modified on Mar 18, 10:36 AM. The 28-day run history table shows 3 successful runs with durations of 00:01:17, 00:01:20, and 00:01:40. A red warning box in the "Connection References" section indicates a connection issue with "vBMT CDS Connector" (Microsoft Dynamics 365).

Start	Duration	Status
Nov 30, 03:18 PM (2 h ago)	00:01:17	Succeeded
Nov 30, 03:08 PM (2 h ago)	00:01:20	Succeeded
Nov 30, 08:49 AM (8 h ago)	00:01:40	Succeeded