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 <u>each and every</u> Absence Type you <u>want to</u> 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 Setting**s 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 31.03.20**23,** 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

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)

7. **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.

8. 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/

9. **Activate those Cloud Flows**

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

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
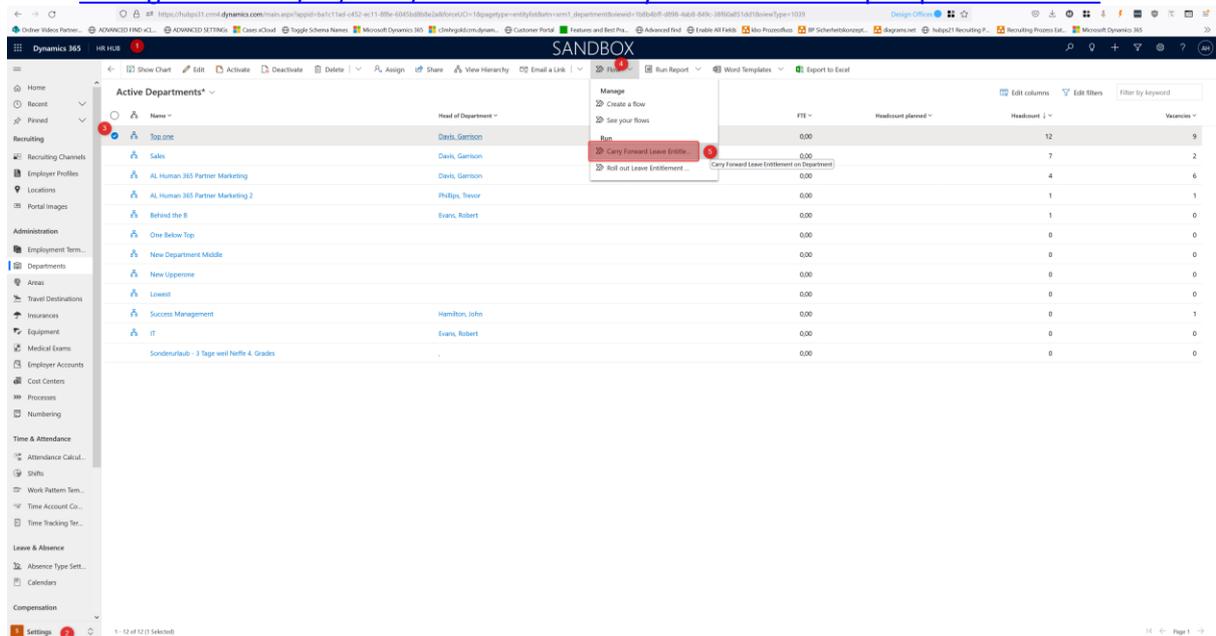- Carry Forward Leave Entitlement on Employee
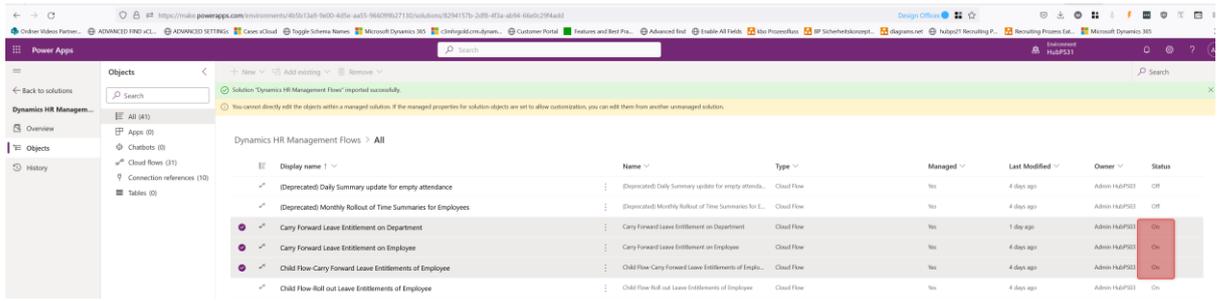
Turn on each cloud flow one by one (start with Child Flow-Carry Forward Leave Entitlement on Employee), if they aren't already turned on. If they are turned on, the button says "Turn off".
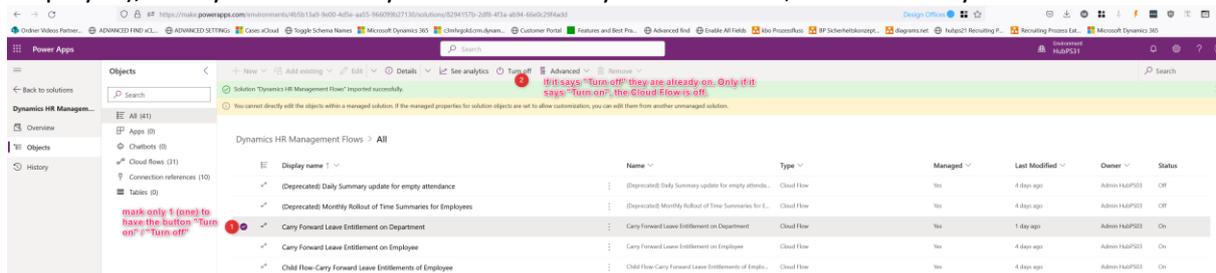
10. After all points have been successfully completed, Start the Carry Forward.
    Please be aware: you can only carry forward if the year you are trying to carry forward from, is finished. E.g. you can only carry forward to 2024 earliest 1.1.2024.
    Please carefully read this this Guide and make 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
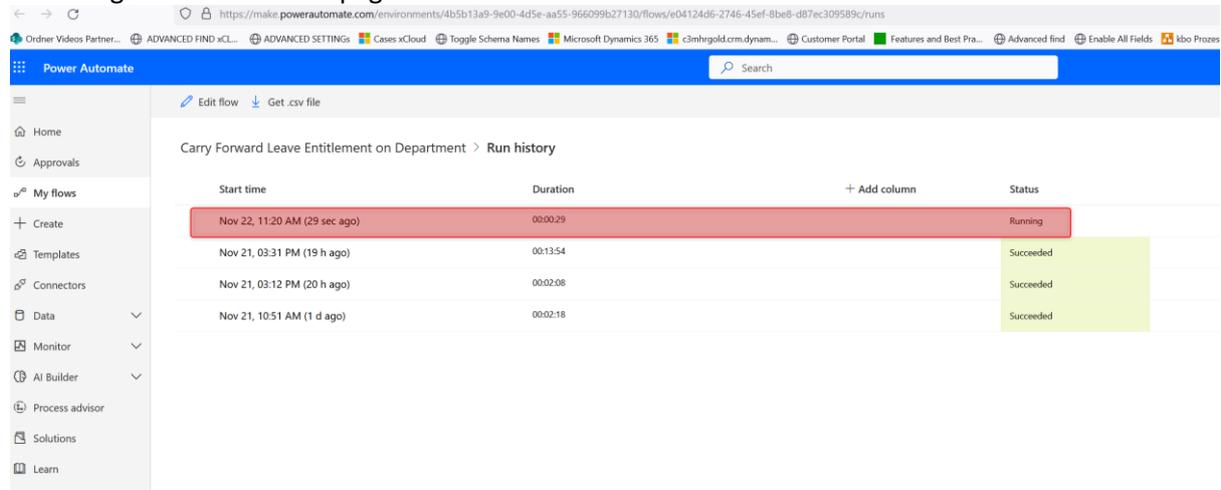

Check if all Carry forwards worked:

After you triggered the Cloud Flow "Carry Forward Leave Entitlement on Department", please click on "Flow Runs Page":
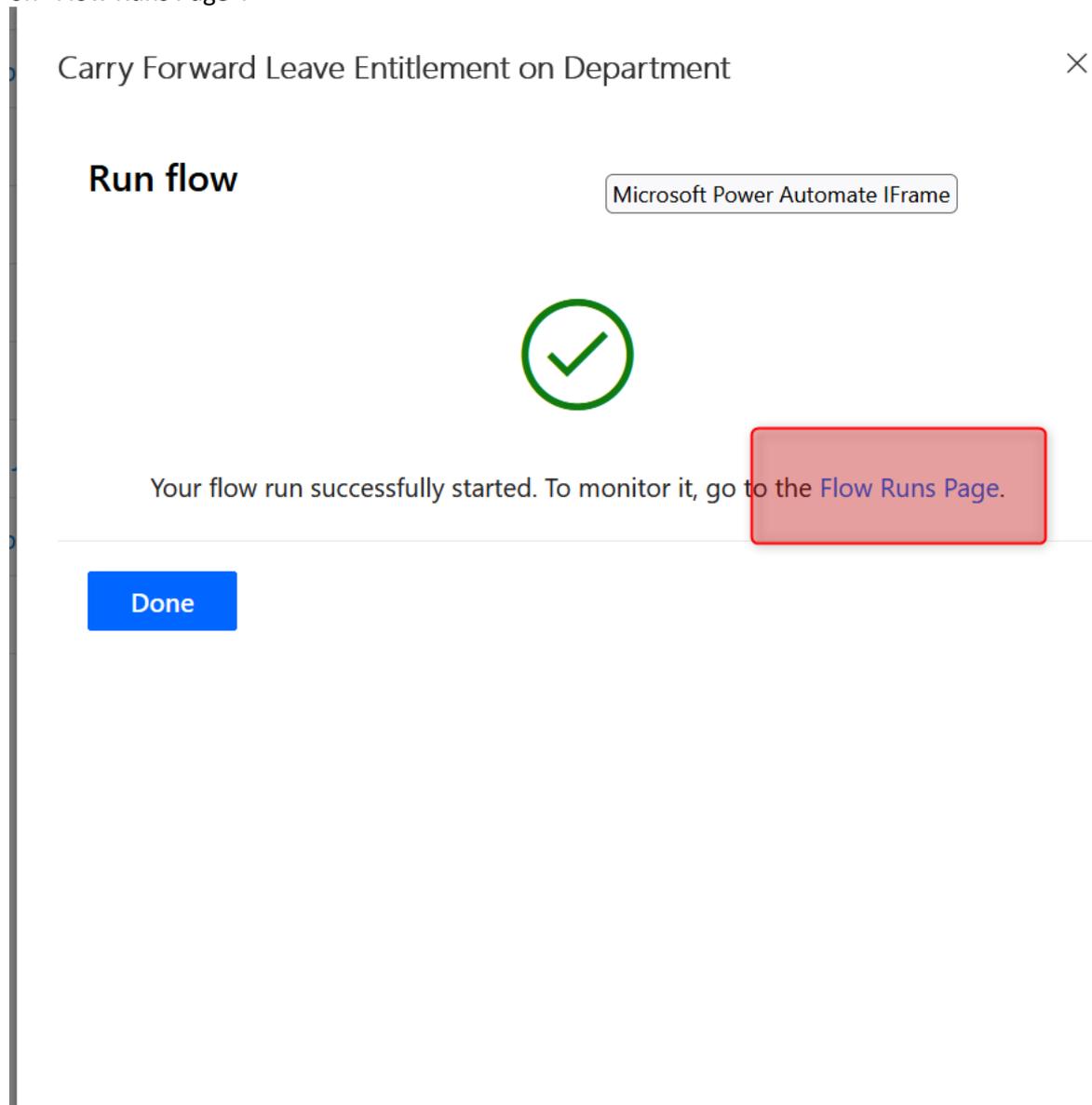
You will get redirected to a page that looks similar to this:

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:

Trouble Shooting:

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