Creating a Chart to View your Accruals and Adding it your Home Page

Using a dataview, you can create a chart to be able to view your accrual balances. You can add the chart to your home page so you will always know your current accrual balances.

To access a Dataview and Personalize a Dataview

1. Click Main Menu > Dataviews & Reports > Dataview Library.
2. On the Dataview Library page, select Accrual Balance by Accrual Code
3. In the Dataview, click Select Timeframe and select Today
4. Select Refine (upper left side menu bar)
5. Select the Filter tab
6. Select Available Balance (Hours)
7. From the list, select Greater Than (>)
8. Enter 0 to adjust the view to remove any accrual codes with a zero balance
9. Click Done
10. Click Apply
11. Verify that you are seeing only the codes you want to see in the list that has been filtered, then follow steps below to create the Chart

Note:
You can make other adjustment to this view such as hiding columns or sorting by the accrual code name.

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To create a Chart

1. Click the word Charts below the Dataview.

2. Click the icon to open the Tiles panel library.

3. From the Tiles panel, locate My Charts and click Create Chart icon.

4. Select Chart Type: (Note: For accrual balances, vertical bar or horizontal bar will be the easiest to view)
   - Vertical Bar
   - Horizontal Bar
   - Line
   - Pie

5. Under Category, select Accrual Code Name

6. Under Metric, select Available Balances (Hours)

7. The Values Calculation defaults to whatever value is set in the Dataview itself.

8. Use the default for Limit Data? of No since you want to view all your accrual balances over 0 and not limit the ones to display.

9. Use the default setting for the Display Options

10. (Optional) Change the Title of your chart if you wish

11. Select Colors palette you want to use

12. Select Save

13. Once your chart displays in the Dataview view, you will want to add it to your home page. See below on How to Add your Chart to your Home page
Add the Chart to your Home Page

Return to your Home page screen:

1. On the Home page, click **Settings** icon at the top right of the screen.
2. In the Tiles pop up panel, scroll down to **My Charts** and select the chart you just created.
3. Click **Apply**
4. It will now show and remain on your Home page until you choose to remove it.