EMT USER GUIDE:
Step-by-Step Instructions for Building Great Charts

The Equity Management Tool (EMT) was developed for the Leaders for Equity and Equal Pay (LEEP) Toolkit, a joint project of Change The Story VT and Sadowski Consulting Services. The LEEP Toolkit empowers small and mid-size organizations to conduct ongoing, in-house gender and racial pay equity reviews. The EMT was created by Sadowski Consulting Services and further developed in collaboration with Gallagher Flynn & Company, LLP. For more information about the EMT, contact Frank Sadowski at sadowskiconsulting.com

Change The Story VT (CTS) is a partnership initiative of the Vermont Women's Fund, Vermont Commission on Women, and Vermont Works for Women dedicated to advancing women's economic security. You can learn more about CTS projects at www.changethestoryvt.org

This is a step-by-step example of how to build a simple chart, one that looks at how a company is paying its Customer Service Representatives relative to their experience by gender.

Once you have entered your data into the data sheet, you are ready to build charts. Click on the Analysis tab. Your screen should look something like this, although you will have your own data represented in the charts. (Please note that any time you change any information that is in the data tab, you need to open the "Data" tab in the ribbon at the top of your page and click "Refresh All" so that data is incorporated into the database and the charts.)
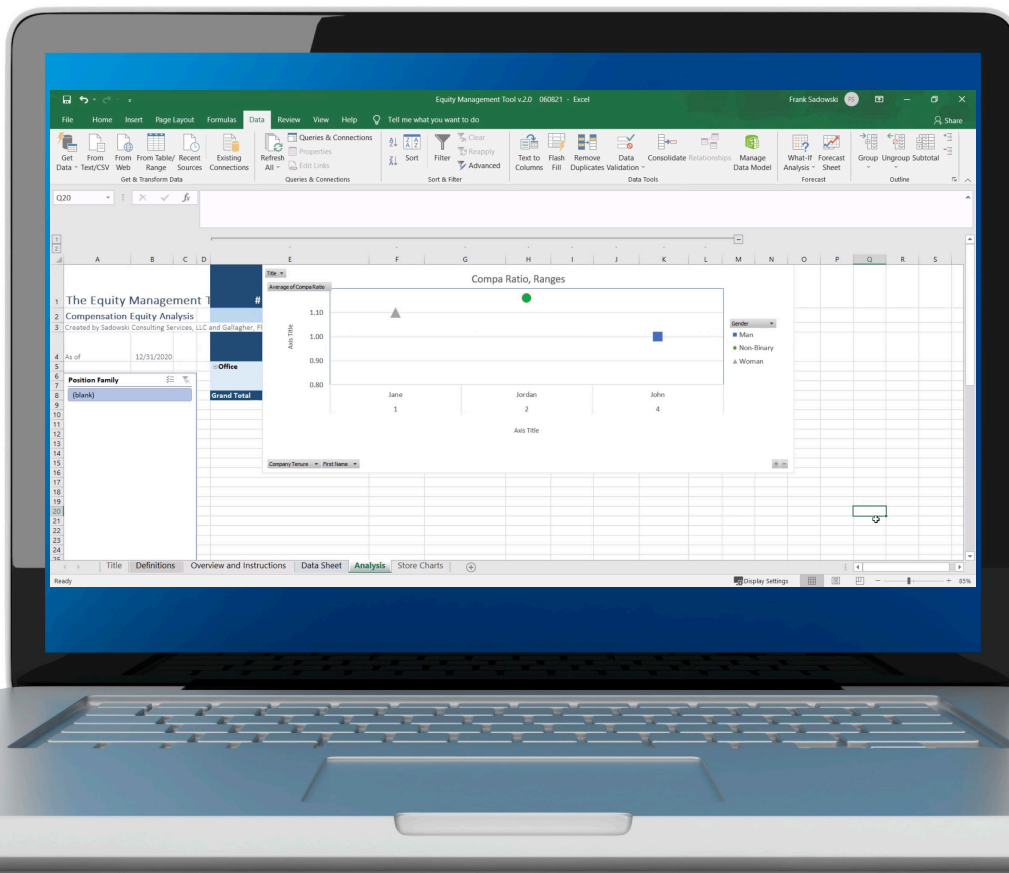
1. With your cursor in the area around the graph, right click to get a list of options. Then click on "Show Field List." Alternatively, if you click on the "Analyze" tab at the top of your screen, you can click on "Field List."

2. The "PivotTable Fields" list should show you all of the columns in your data base. To build your chart, click on the variables you want to include and drag them to the appropriate box. For any chart where you are analyzing gender pay equity, click on "Gender" and drag it into the "Legend" box. (If you were going to analyze racial pay equity, you would click on "Race" and drag it to the "Legend" box. You could also look at how veteran's status, disabilities, or specific certifications make a difference in pay if you have the data.) What is in the "Legend" box determines how the data points in your chart will be differentiated.
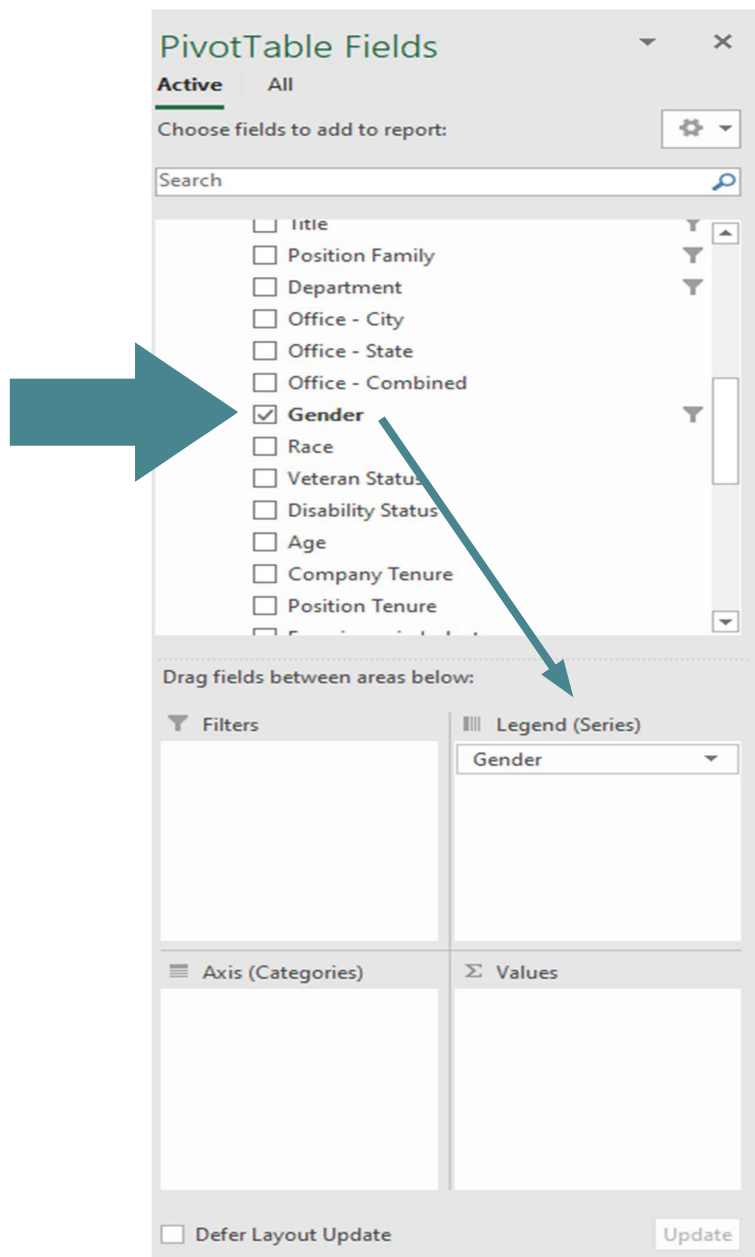
**3.** Next, click on "Title," then click on the down arrow that shows up.
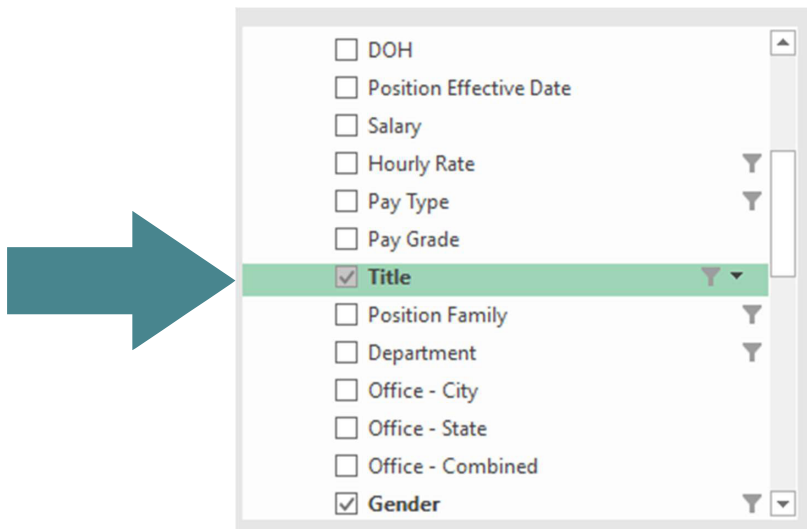
4. This will open a box that includes all of your job titles. You can use this to create the combinations of jobs you might want to compare in a chart. In this case, we want to make sure that the only title checked is "Customer Service."
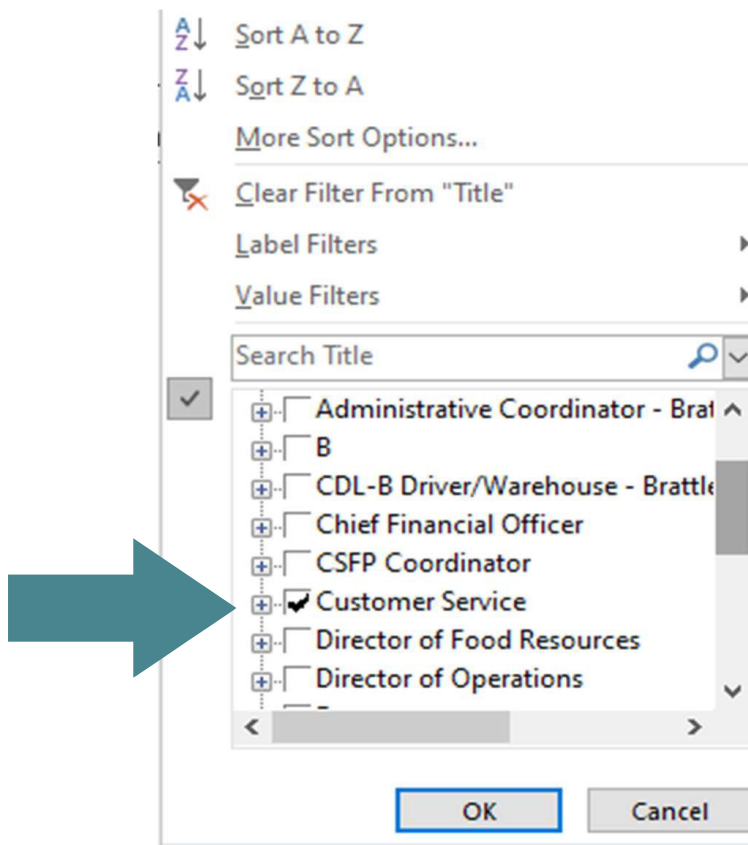
5. Now click on "Title" and drag it to the "Filter" box. Then, decide what variables you want to have on the x-axis of your chart. In this case, because we want to know the relationship between pay and years of experience within the company, we will click on "Company Tenure" and drag it to the "Axis (Categories)" box. We also want to be able to identify each data point, so we will drag "First Name" into that same box. After we do that, the PivotTable Fields should like this.
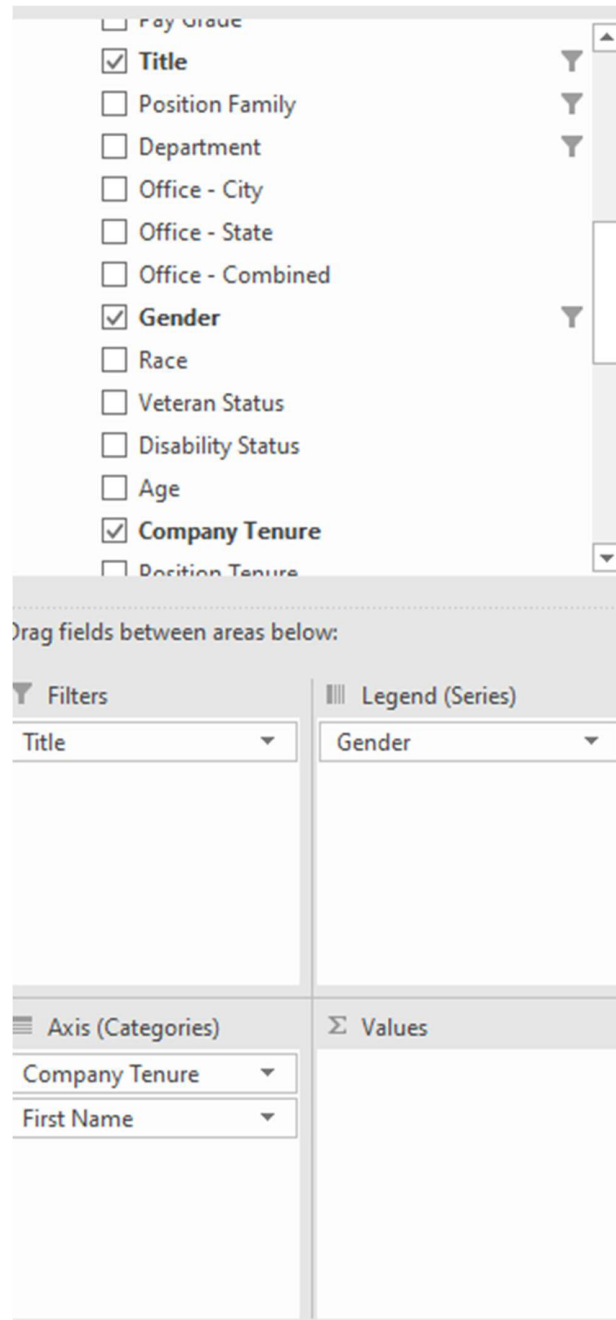
6. As you put these variables in, you should see your chart taking shape. Now click on "Compa Ratio" because that will be your y-axis, which goes into the "Σ Values" box. "Compa Ratio" will show up in the "Σ Values" box, but it will probably show up as "Sum of Compa Ratio" due to the mysteries of pivot table mechanics.
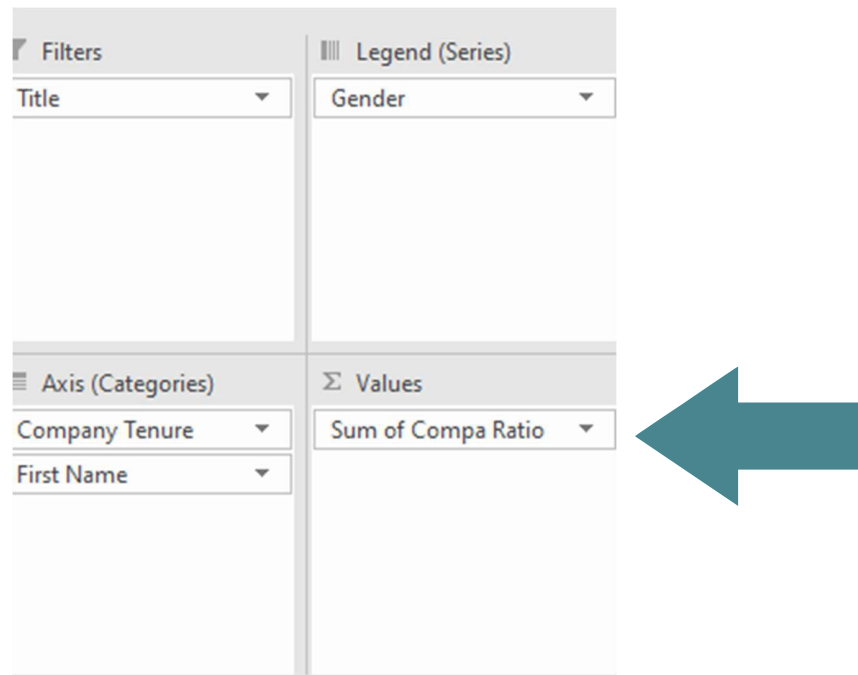

Click on "Sum of Compa Ratio" in the box. You will get a pop-up list; click on "Value Field Settings," then click on "Average" and "OK." "Sum of Compa Ratio" should have changed to "Average of Compa Ratio," and you should have a chart that looks something like this:
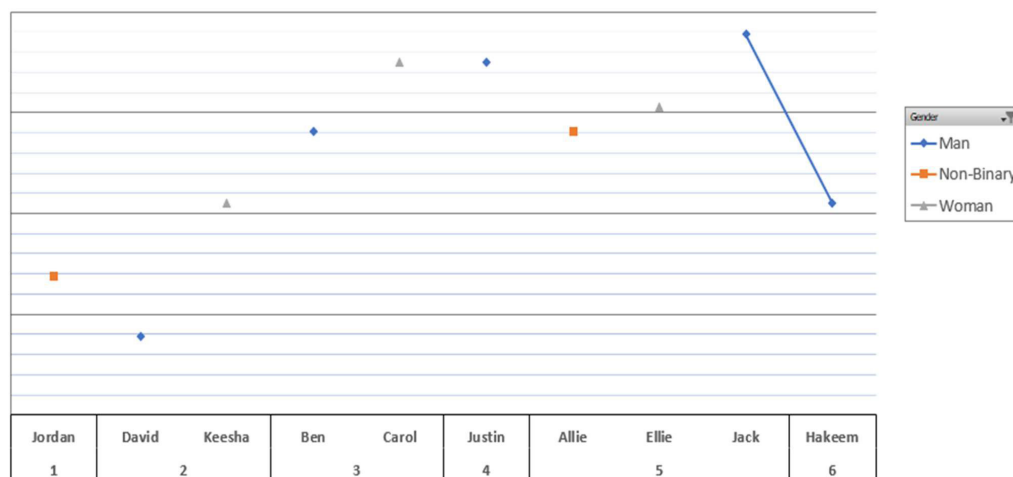
7. This chart has all the data, but it needs a little more work. First, name the chart and your axes. You should see a ➕ box just outside the chart area. If you don't, make sure the "PivotTable Fields" popup is there, then click just to the right of the chart, and it should appear. Click on it, and you get a menu of options:
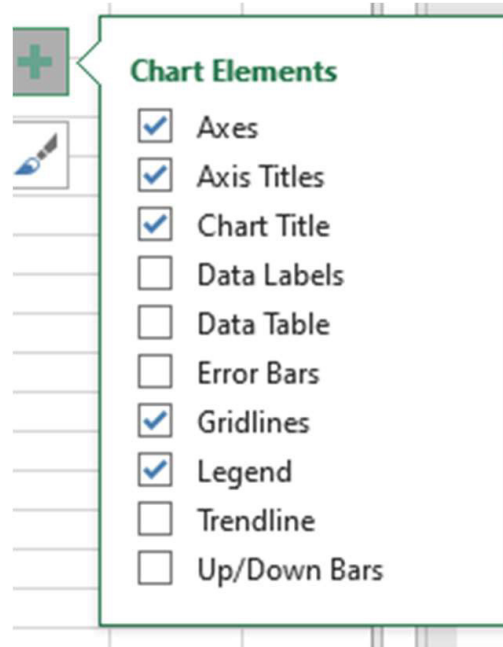

Check what you want to add to the chart. This will allow you to give the chart a title and label the axes. Right click on any of the labels in the chart, and you will get options for changing the title and axis names and font size.
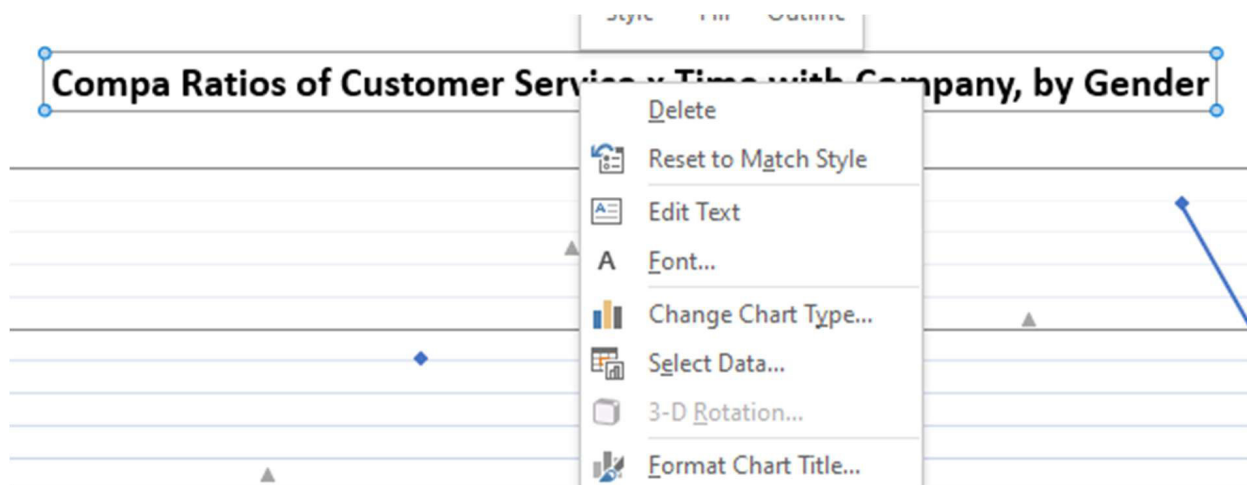
8. Common Chart Formatting Problems

- **The dots on the graph are connected with lines.** In these charts, connecting the dots is not usually helpful. To get rid of them, put your cursor on one line and right click twice. You will get a list of options. Click on "Format Data Series." In the "Format Data Series" column that appears, click on the diamond (the symbol furthest left as you are looking at it). Then click on "No Line".
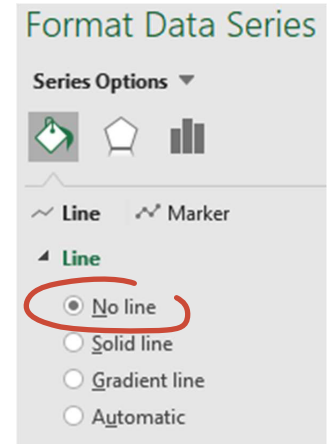
- **The symbol for each data point is very small.** Right click on one of the data points. If the "Format Data Series" is not already visible, click on that. Click on the diamond. Then double click on "Marker." Click on "Marker Options." Click on " Built-in." Adjust "Type," "Size, and "Color" to make the graph look the way you want.
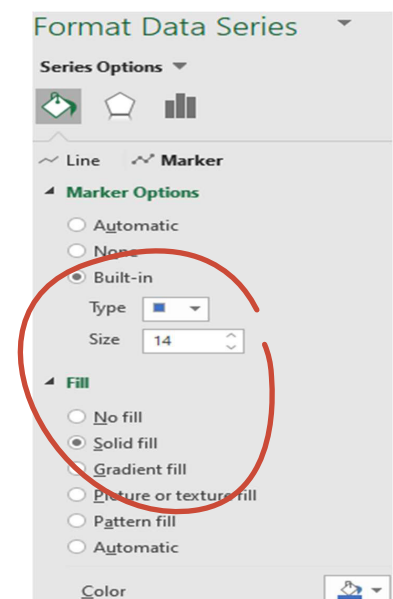
- **There is a line through a symbol in the "Legend" box in the chart.** Click on the word and symbol where you want to get rid of the line. Right click on the symbol to get drop-down list. Get to "Format Legend " column. Click on the diamond. Under "Border," click on "No Line."
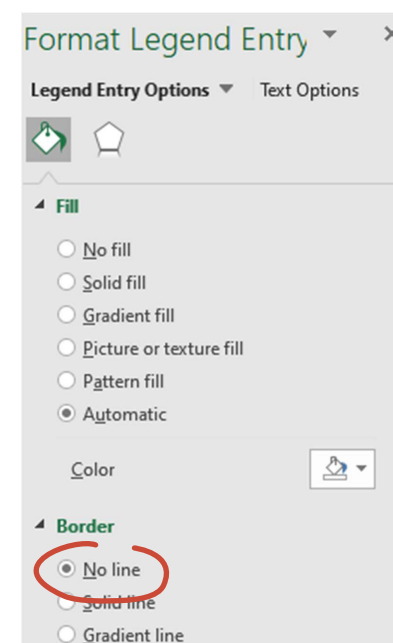
The final result should help you and others see if and where your current pay is inconsistent with your compensation philosophy. For instance, in the following chart, some of the current pay is consistent with paying for experience, but at least five people are not being paid consistent with the philosophy. So the question is simply, why? What has happened in the pay decisions related to these people that leads to these results? You need to understand that before you can develop a strategy to bring their pay into alignment with your comp philosophy.
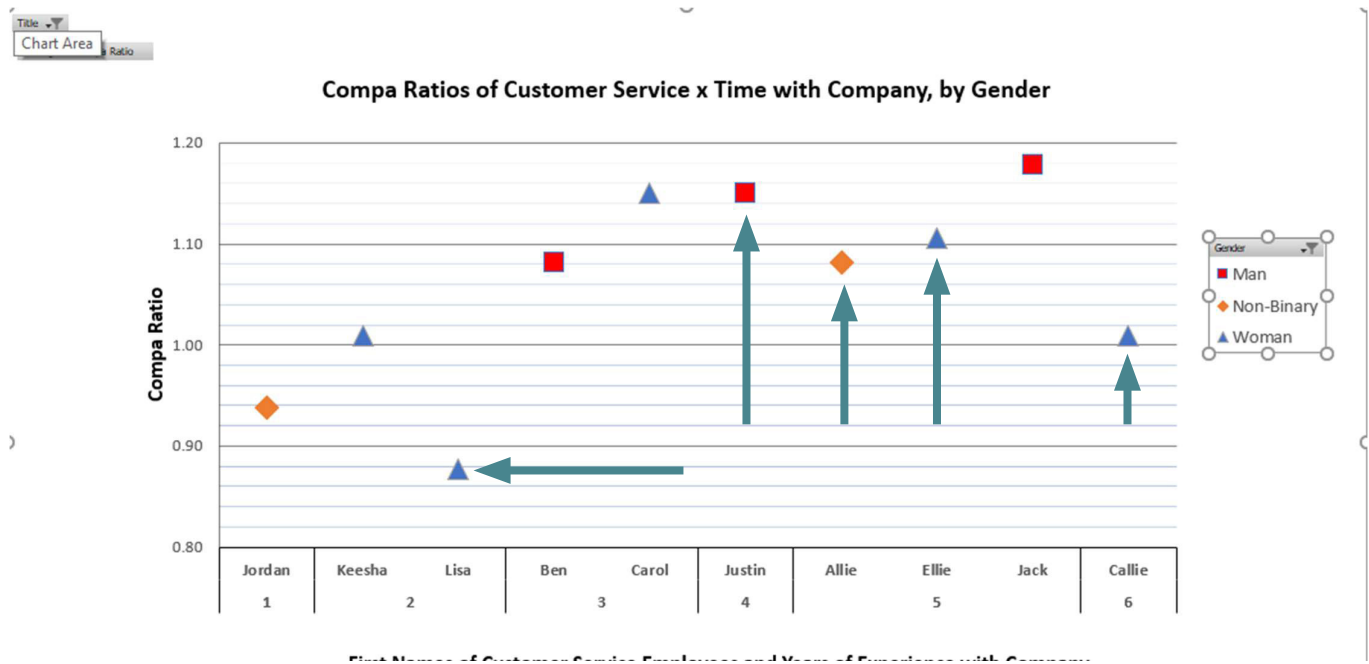
Once you have learned these basics, you can explore the various other options available in the various pop-up tabs. You can also add your own variables to the data base so that you can do additional analysis of your workforce.