

# Visier Product Documentation

## PROPRIETARY INFORMATION

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# Supported browsers and system requirements

## Supported browsers

Visier is designed to work with the following browsers:

Browsers	Versions
Google Chrome (Recommended)	Latest
Microsoft Edge	Latest

## Supported operating systems

Visier is designed to work with the following operating systems:

- Microsoft Windows 10
- macOS

## System requirements

Your computer must meet the following minimum technical specifications to run and use Visier:

	Requirements
Memory	<ul style="list-style-type: none"> <li>• Minimum: 8GB</li> <li>• Recommended: 16GB</li> </ul>
Resolution	<ul style="list-style-type: none"> <li>• Minimum: 1366x768 pixels</li> <li>• Recommended: 1920x1080 pixels</li> </ul>
Internet Connection Speed	<ul style="list-style-type: none"> <li>• Download: 25 Mbps</li> <li>• Upload: 20 Mbps</li> </ul>

Your computer must have the following programs installed to use some of the solution features:

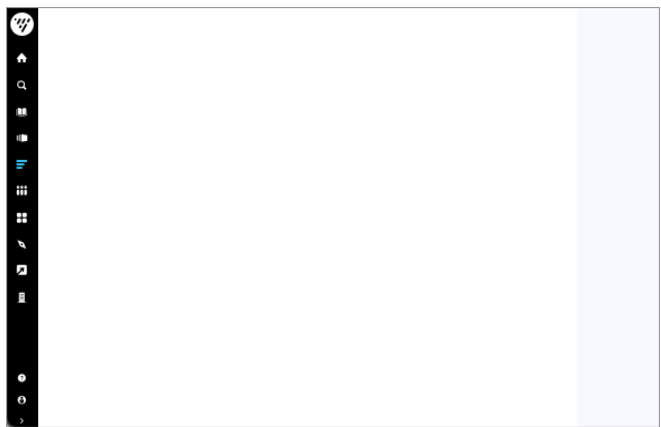
- A PDF viewer
- Microsoft Powerpoint
  - Exports will be downloaded in the PPTX format
  - Template uploads to Visier must be in the PPT format
- Microsoft Excel (2013 and 2016)
- Tableau Desktop 2021.1.2 or later

# Analytics navigation

Get acquainted with the user interface and learn how to navigate the solution experience.



## The navigation bar











The navigation bar, located on the left side of your screen, is the hub of the solution experience. Unless you are in a presentation view, the navigation bar is always there to help orient you and get you to the rooms you need to go.



## The rooms

The navigation bar provides quick access to the rooms that you have access to in the solution. The following table describes the rooms that are available.

Element		Description
	Home	View a default analysis when you first sign in to Visier.
	Ask Visier	Find metrics, analysis, and plans that you own or have access to.

	Guidebook	View prebuilt analyses to get insight into your business questions.
	Analyses	Create analyses to turn your saved captures into a data-driven narrative that you can share with stakeholders.
	Explore	Conduct ad hoc analysis on any metric in the solution. Explore the data and customize charts to suit your needs.
	Compare	Compare employees, candidates, requisitions, or any subject side by side.
	Captures	View your saved analyses.
	Plans	Create and collaborate on workforce plans.
	Data Exports	Leverage Visier metrics and data outside of the solution with Data Exports.
	Studio	Access the studio experience as an administrator user.
	Help	Access the Visier Customer Portal.
	User	Sign out of the solution and change user preferences.



# Explore: Conducting ad hoc analysis

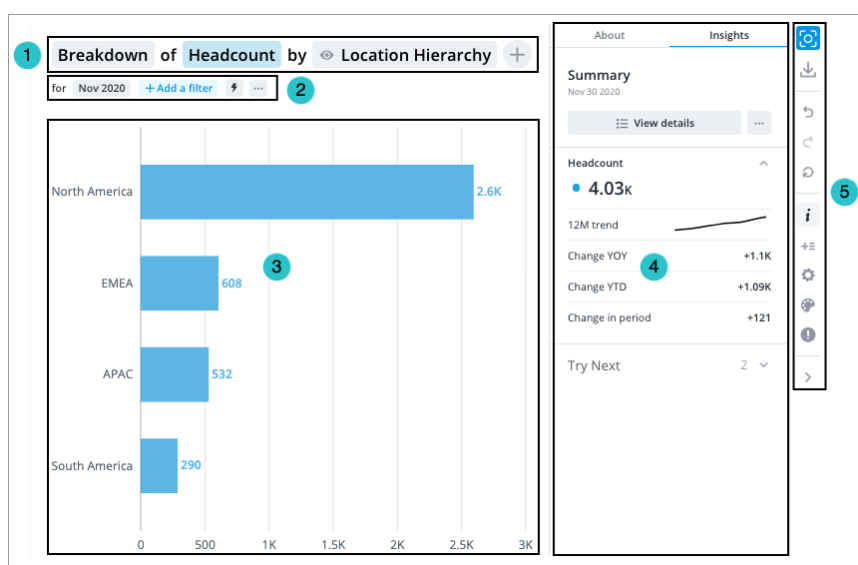
View and build visuals in the Explore room and full screen.

## Overview

Explore is where you will conduct most of your ad hoc analysis in the solution.

To access Explore, click **Explore** on the navigation bar. You can also access the Explore workflow (in full screen) by selecting a chart in an analysis.

Use the various elements to analyze your data and build a visual to suit your needs.





1. Visual title: Describes and controls the data that is displayed in the chart. Click the Metric picker, Visual picker, and Group By picker in the visual title to change the data that is displayed.
2. Analysis Context toolbar: Change the Analysis Context to select the population and time period for analysis.
3. Chart: Graphical representation of one or more metric.
4. Side panel: View contextual information about selected metrics and data points, customize the appearance of your chart, and change chart configurations.
5. Visual Actions menu: Use these quick access buttons to perform chart actions and open chart customization and configuration options in the Side panel.

## The Explore workflow

Use the following workflow to conduct ad hoc analysis in Explore.

1. Select the metric that you want to explore.  
**Note:** The metric that you select determines the Visual types and group by attributes you can use.

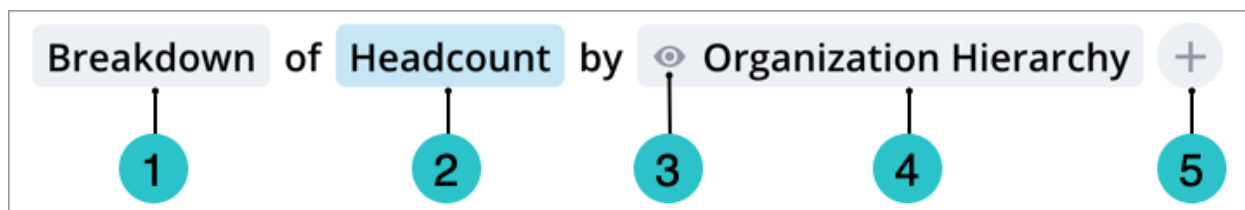
2. Select the visual type and the attribute you want to group your data by.
3. Set your analysis context by selecting the time period and the population that you are analyzing.
4. Explore your data and view more information about data points in the Info panel.  
**Tip:** Right-click on a chart item or data point to open the Visual Item Actions menu. Find actions that will allow you to quickly interact with points of interest. Actions include drilling up or down to view different levels of your data and accessing View details to see a list of subject members or event occurrences that make up a given population.
5. **Optional:** Add additional metrics, groups, or time periods for comparison by clicking the **Compare to** button .
6. **Optional:** Use the Visual Actions menu to customize the appearance of your chart in the Side panel.
7. **Optional:** Create a capture of your chart to save your analysis by clicking the **Capture** button .

## The visual title

Describes and controls the data that is displayed in the visual.

### Overview

The visual title is composed of the Visual picker, the Metric picker, and the Group By picker, as shown in the following screenshot.



1. Visual picker: Select the visual type for your chart.
2. Metric picker: Select the metric to be analyzed.
3. Group By picker: Select the attribute that the data is organized by.
4. Add focus: Select the attribute values that are displayed. Allows you to show or hide chart items.
5. Add a Secondary Group By: Select an additional attribute that is used to organize the data.

#### Tip:

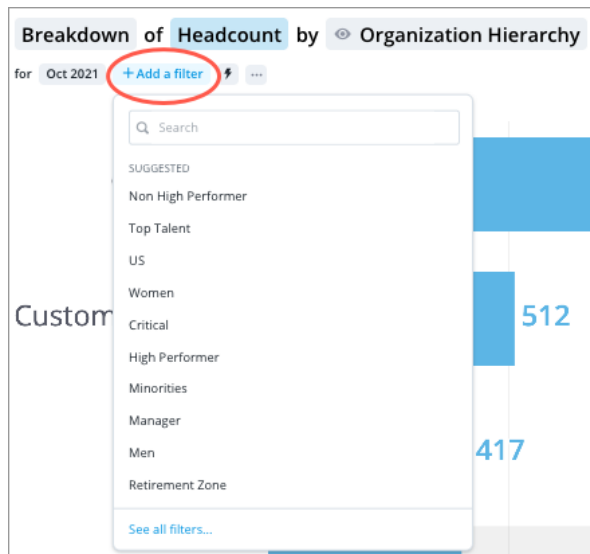
- When conducting ad hoc analysis, we recommend that you start by selecting the metric you want to analyze because the options available in the Visual picker and Group By picker depend on the metric that is selected.
- To ensure that a meaningful visualization is displayed, parts of the visual title will automatically change if an invalid selection is made.
- The stacked bar chart is only available for additive metrics whose values for different populations can be summed to calculate a total value for the combined population.

- Headcount is an additive metric because you can add the headcounts of Group A and Group B to calculate a total.
- Resignation rate is not an additive metric because you cannot add the resignation rates of Group A and Group B to calculate a total.

## The picker views

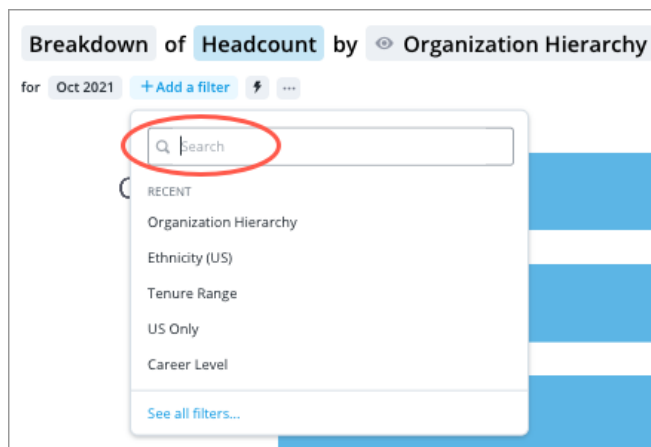
The Metric, Filter, and Group By pickers have two different views.

When selecting these pickers, you'll be initially presented with a menu that contains a search box and list of suggested metrics or attributes, as shown in the following screenshot.

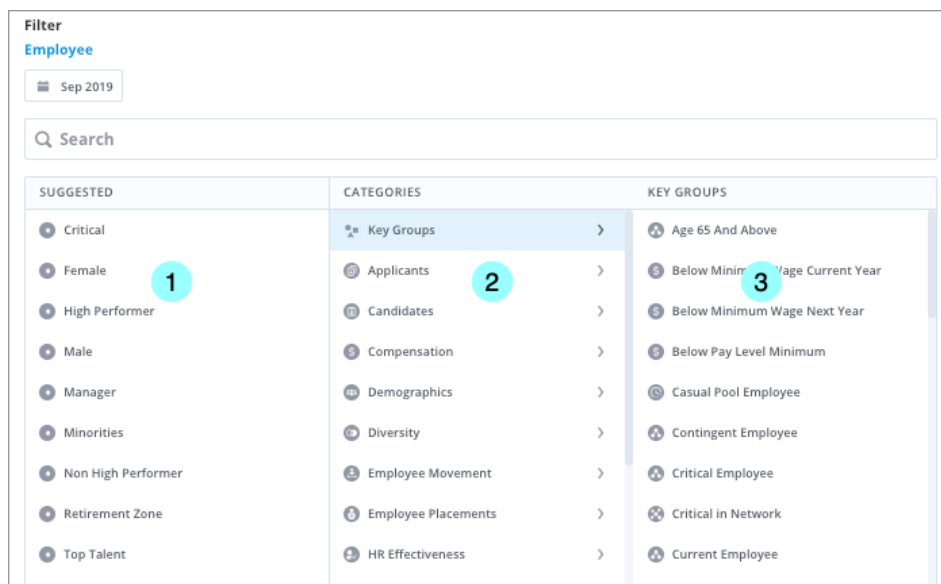


The suggestions are based on the metric or attribute that is currently selected.

You can see a list of recently used items by selecting the search box, as shown in the following screenshot. Only previously selected user created key groups and group by attributes will appear in the list of recently used filters.



If you want to see the entire list of metrics or attributes that are available to you, click See all at the bottom of the picker. This will open the pickers in full screen, as shown in the following screenshot.



In this view, you can use the following panes to browse and select metrics or attributes:

- Suggested pane: A list of the most relevant metrics or attributes for the selected item. This pane will not appear if there are no suggestions.
- Categories pane: A list of the metric or attribute categories. Select a category to see the included metrics and attributes in the Selection pane which is located on the right side of the picker.
- Selection pane: A list of the metric or attributes in a category and where you choose a metric or attribute. After you select an attribute, you'll be prompted to select the attributes you want to include or exclude.

## The analysis context

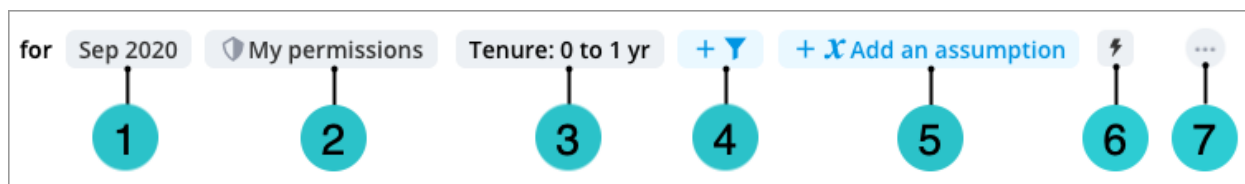
Change the analysis context to select the population and time period for analysis.

### Overview

The analysis context acts as a filter throughout the solution that allows you to:

1. Narrow down the data to a specific population. For example, you can add filters to view data only for the HR team.
2. Select the time granularity and time period for analysis. You can change the granularity to adjust the frequency at which results are calculated and shown (e.g., switch from a yearly to monthly view). Then, change the time period to view data for a specific point in time (e.g., December 1989) or a time range (e.g., July 2016 to June 2017).

You can change the analysis context using the options available in the Analysis Context toolbar. To perform this task you will need the **Change Analysis Context** capability. Contact your administrator to grant you this capability.

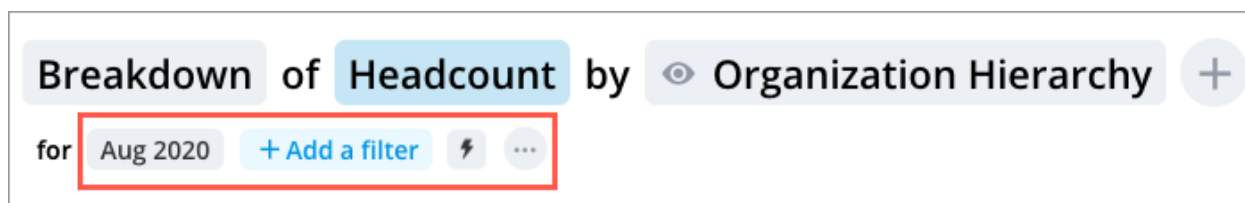


Time picker: Displays the time context. Click to change the granularity, time period, and time window for your charts.

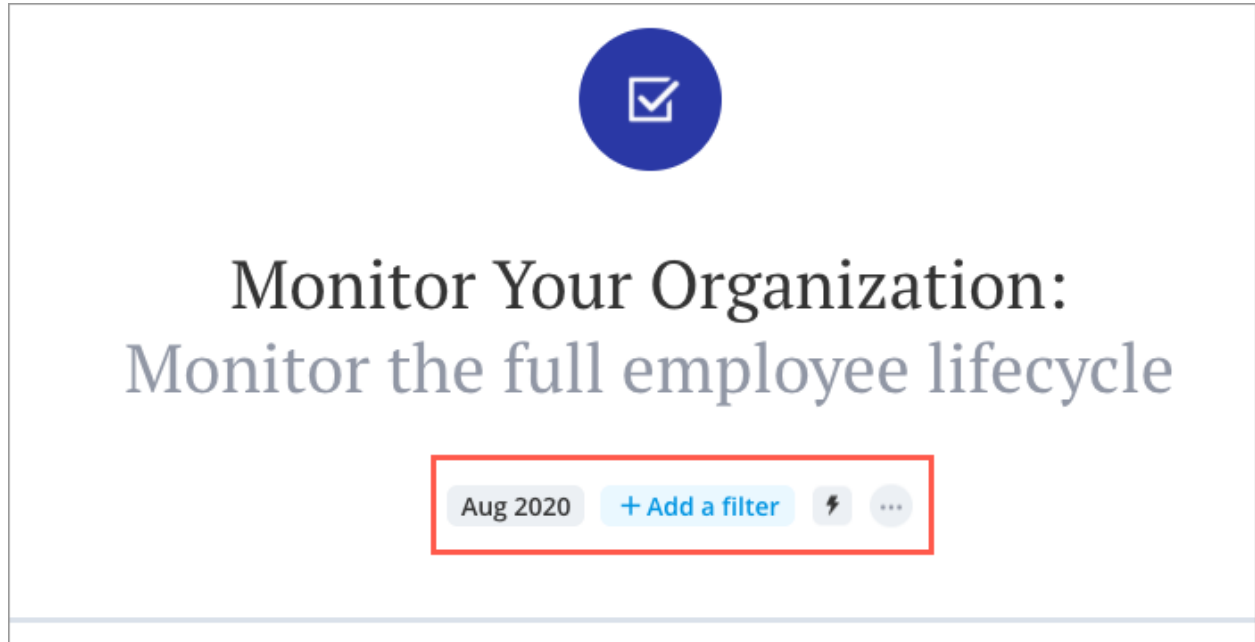
1. My permissions: Click to see your security context, the permissions applied to your account, and the data access you've been granted. This will help you understand why you might be seeing certain populations and a subset of the data. The information in the Permissions dialog will change depending on the subject (e.g., Employee and Requisition) that you're analyzing.
2. Analysis context token: Displays the filters, drill path, key groups, assumptions, and scenarios that have been applied.
3. Filter picker: Click to change the analysis population by adding filters and key groups.
4. Add an assumption: Click to adjust your projections by applying assumptions or scenarios. This is only available if your chart or analysis contains a projection metric.
5. Shortcuts: Click to select a filter shortcut from a list of your permissions and key groups. You can set a shortcut as your default context for charts and analyses.
6. More actions: Find options to save key groups and scenarios and open the Key Groups Manager and Scenarios Manager.

You can change the analysis context at the individual chart level or the analysis level.

When working with a chart, you can find the Analysis Context toolbar located below the visual title, as shown in the following screenshot.



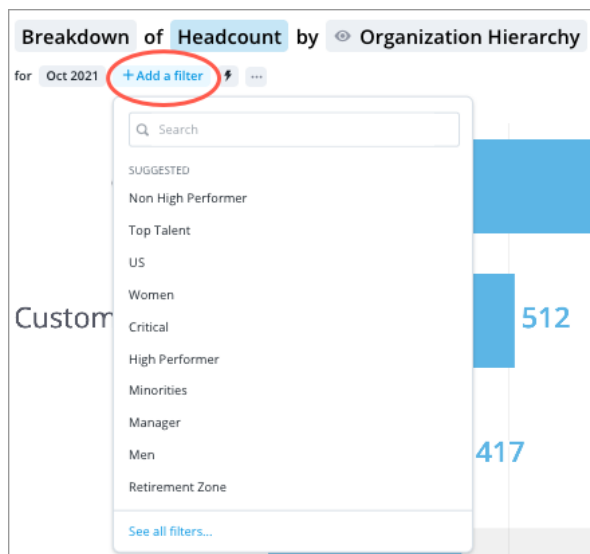
When working with an analysis, you can find the Analysis Context toolbar located below the analysis title, as shown in the following screenshot.



## The picker views

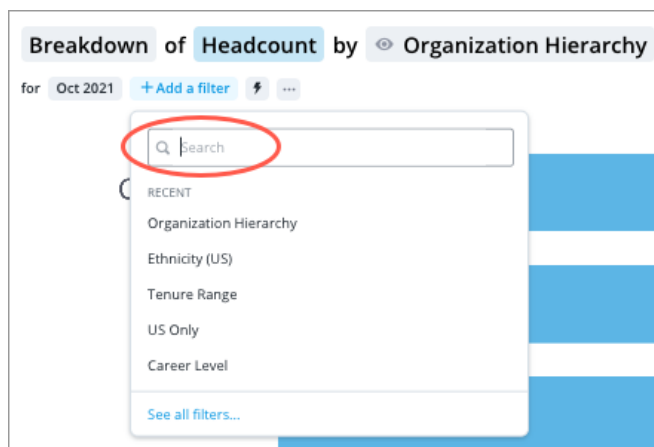
The Metric, Filter, and Group By pickers have two different views.

When selecting these pickers, you'll be initially presented with a menu that contains a search box and list of suggested metrics or attributes, as shown in the following screenshot.

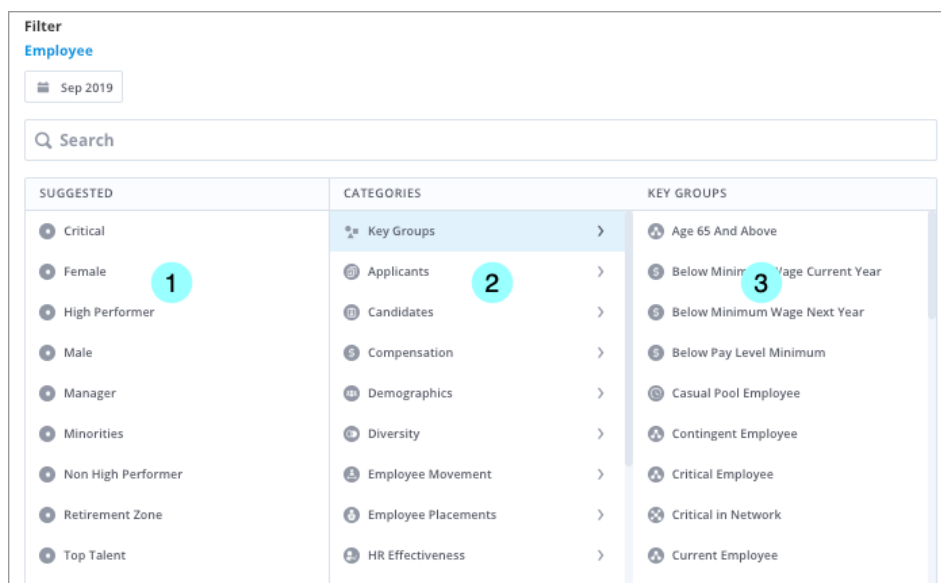


The suggestions are based on the metric or attribute that is currently selected.

You can see a list of recently used items by selecting the search box, as shown in the following screenshot. Only previously selected user created key groups and group by attributes will appear in the list of recently used filters.



If you want to see the entire list of metrics or attributes that are available to you, click See all at the bottom of the picker. This will open the pickers in full screen, as shown in the following screenshot.



In this view, you can use the following panes to browse and select metrics or attributes:

- Suggested pane: A list of the most relevant metrics or attributes for the selected item. This pane will not appear if there are no suggestions.
- Categories pane: A list of the metric or attribute categories. Select a category to see the included metrics and attributes in the Selection pane which is located on the right side of the picker.
- Selection pane: A list of the metric or attributes in a category and where you choose a metric or attribute. After you select an attribute, you'll be prompted to select the attributes you want to include or exclude.

# Filters

Apply filters to view data for a specific analysis population.

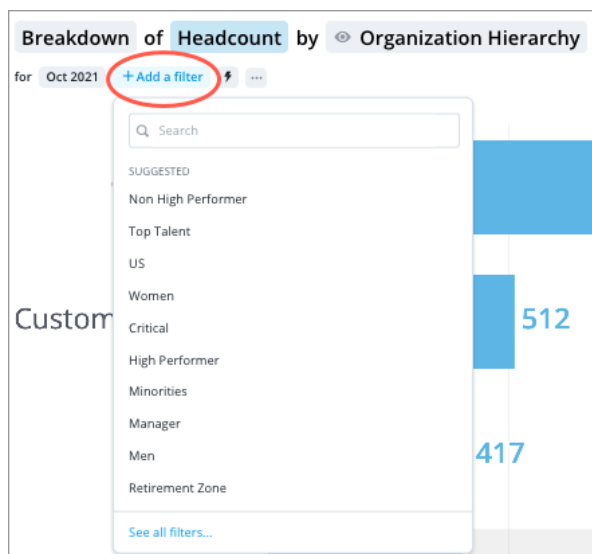
## Overview

Filtering is essential to conducting ad hoc analysis and allows you to view a smaller part of your data set. When applying a filter, you're choosing one or more values of an attribute to include or exclude from your view. For example, if you want to analyze data for employees located in North America, you would only select the North America value from the Location Hierarchy attribute to include in your view. You'll notice that we've grouped attributes by category so they're easier to find when filtering. For example, the Location Hierarchy attribute is found under the Organization category

The picker views

The Metric, Filter, and Group By pickers have two different views.

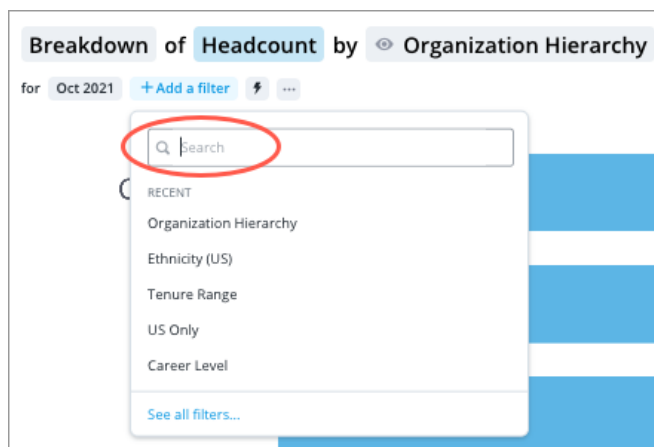
When selecting these pickers, you'll be initially presented with a menu that contains a search box and list of suggested metrics or attributes, as shown in the following screenshot.



The suggestions are based on the metric or attribute that is currently selected.

You can see a list of recently used items by selecting the search box, as shown in the following screenshot. Only previously selected user created key groups and group by attributes will appear in the list of recently used filters.

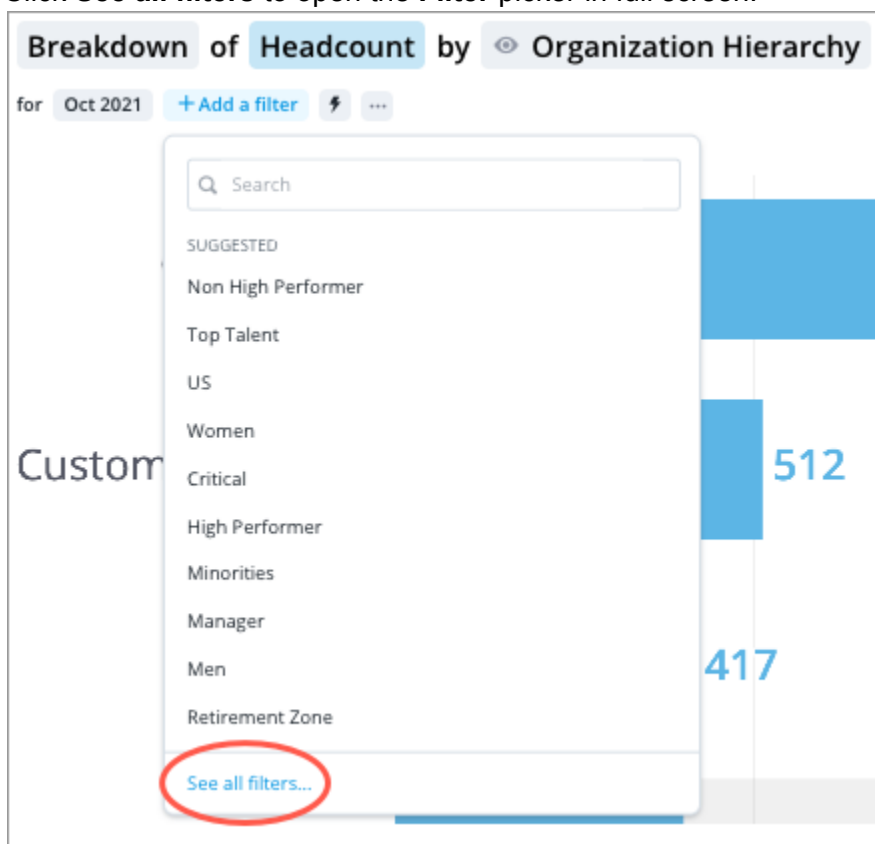




If you want to see the entire list of metrics or attributes that are available to you, click See all at the bottom of the picker. This will open the pickers in full screen, as shown in the following screenshot.

## Add a filter

1. On the Analysis Context toolbar, click **Add a Filter**.
2. Click **See all filters** to open the **Filter** picker in full screen.

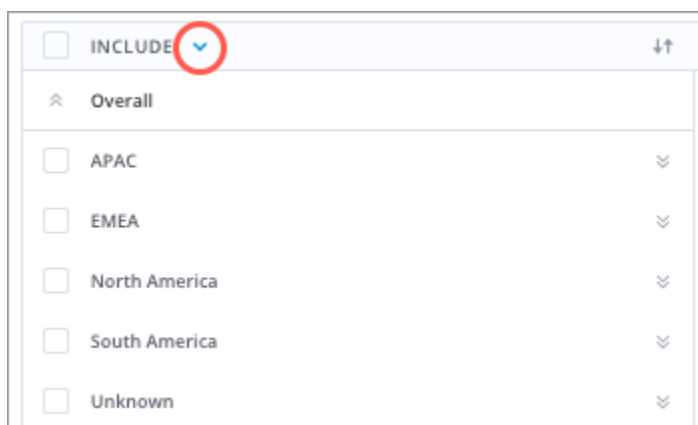


**Tip:**

- You can also search for the attribute and attribute values you want to filter by without opening the Filter picker in full screen.
  - The suggestions are a list of the most relevant filters for the selected subject.
  - Click the search box to see a list of your recently used filters. Only previously selected user created key groups and group by attributes will appear in the list of recently used filters.
3. In the **Filter** picker, define the filter criteria by doing the following.
    - a. In the **Categories** pane, select a category to see the attributes in the **Selection** pane, which is located on the right side of the picker. For example, Organization.
    - b. In the **Selection** pane, select the attribute you want to filter on. For example, Location Hierarchy.
    - c. Select the attribute values you want to include or exclude. For example, North America

**Note:** Using the Filter picker in full screen

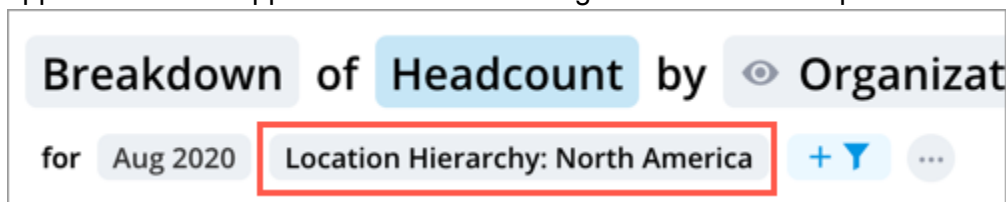
- Attribute values can be arranged into levels, so you may have to drill through multiple levels to find the value you want to include or exclude.
- Switch between the include and exclude option by clicking the Include/Exclude arrow.



4. When finished, click **Apply**.  
**Result:** The data in the chart updates.

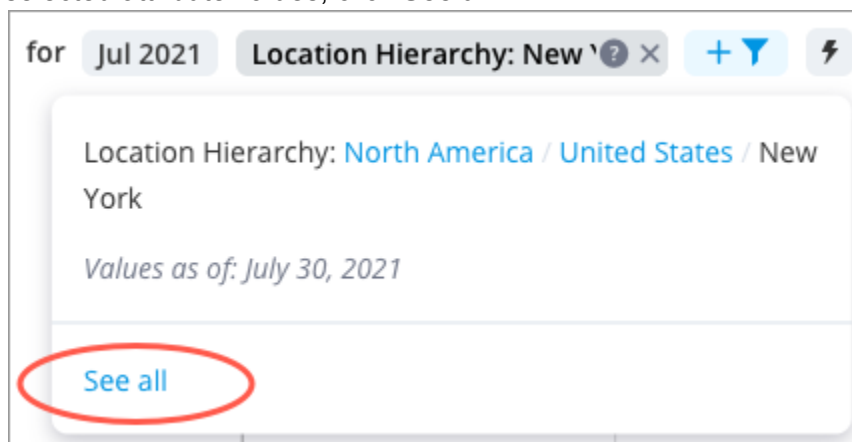
**Note:**

- Applied filters will appear as tokens on the right side of the Time picker.



- To edit the filter, click the filter token.
  - Depending on the filter, a tooltip displaying the drill path may appear when you click the token. To open the **Filter** picker and change the

selected attribute values, click **See all**.



- To remove the filter, click the **Remove** button on the token.
- 5. To add more filters, repeat steps 1 to 4.

## Using filter shortcuts


Shortcuts are a quick way to filter your analysis context. Available shortcuts come from different sources:

- **My Permissions:** Key groups that are based on permissions that have been assigned to you by your admin.
- These key groups are a result of the security filters that your admin has created that give you access to a specific population. For example, if you get access to all employees in South America through your permission, you will be assigned a shortcut under My Permissions for Location Hierarchy: South America.
- **My Key Groups:** Key groups that you've created.
- These are your frequently used analysis context that you've saved as a key group. To use your applied filter as a shortcut and have it appear in the list, you must save it as a key group first.
- **Shared With Me:** Key groups that other users have shared with you.


Note:

- Shortcuts are specific to the subject being analyzed. For example, if you're analyzing Headcount, which is based on the Employee subject, your shortcuts will include Employee-specific key groups.
- You can also set a filter shortcut as your default context. This default applies to all visualizations every time you use Visier.

To apply a filter shortcut:

1. On the **Analysis Context** toolbar, click the **Shortcuts** button .
2. Select a key group from the list.

**Note:** To use your applied filter as a shortcut and have it appear in the list, you must save it as a key group first.

3. **Optional:** To set a key group as your default filter, hover over the key group and click the **Set as default** button . You may remove the filter or change your default filter at any time.

## Metrics

Learn about the difference between Point-in-time and Over-time metrics.

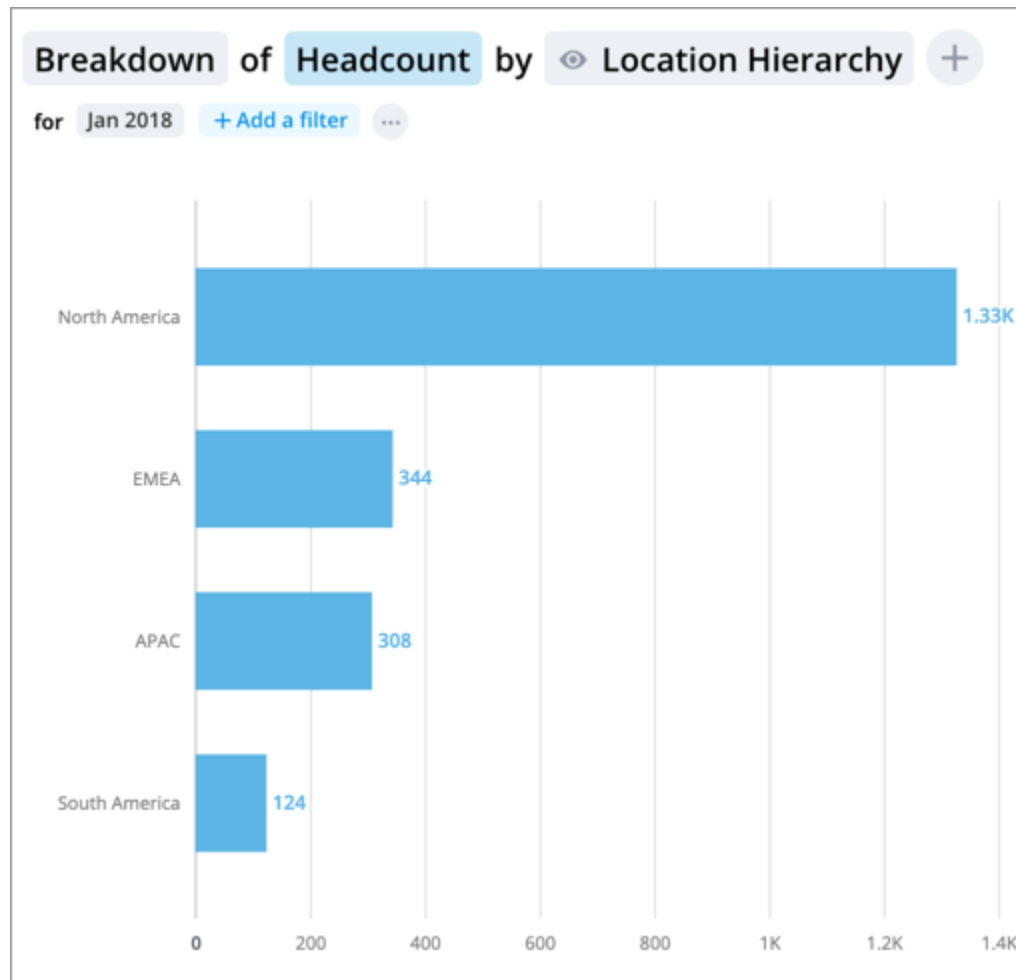
### Metric characteristics

There are two different types of time behavior for metrics. These are defined as Point-in-time and Over-time.

#### Point-in-time

Point-in-time metrics represent data at one specific point in time. Headcount is an example of a Point-in-time metric, as it represents the total number of employees on a certain day. If a period is selected (e.g., January 2018), the last day of the period (e.g., January 31st, 2018) will be used.

Point-in-time metrics are not additive over time, meaning that the metric values for multiple time periods should not be added together. For example, adding the headcount for January 30th with the headcount for January 31st does not make sense. The following screenshot shows a Breakdown chart of Headcount in January 2018. The values in the chart represent the data on the last day of the selected period (January 31st in this case).



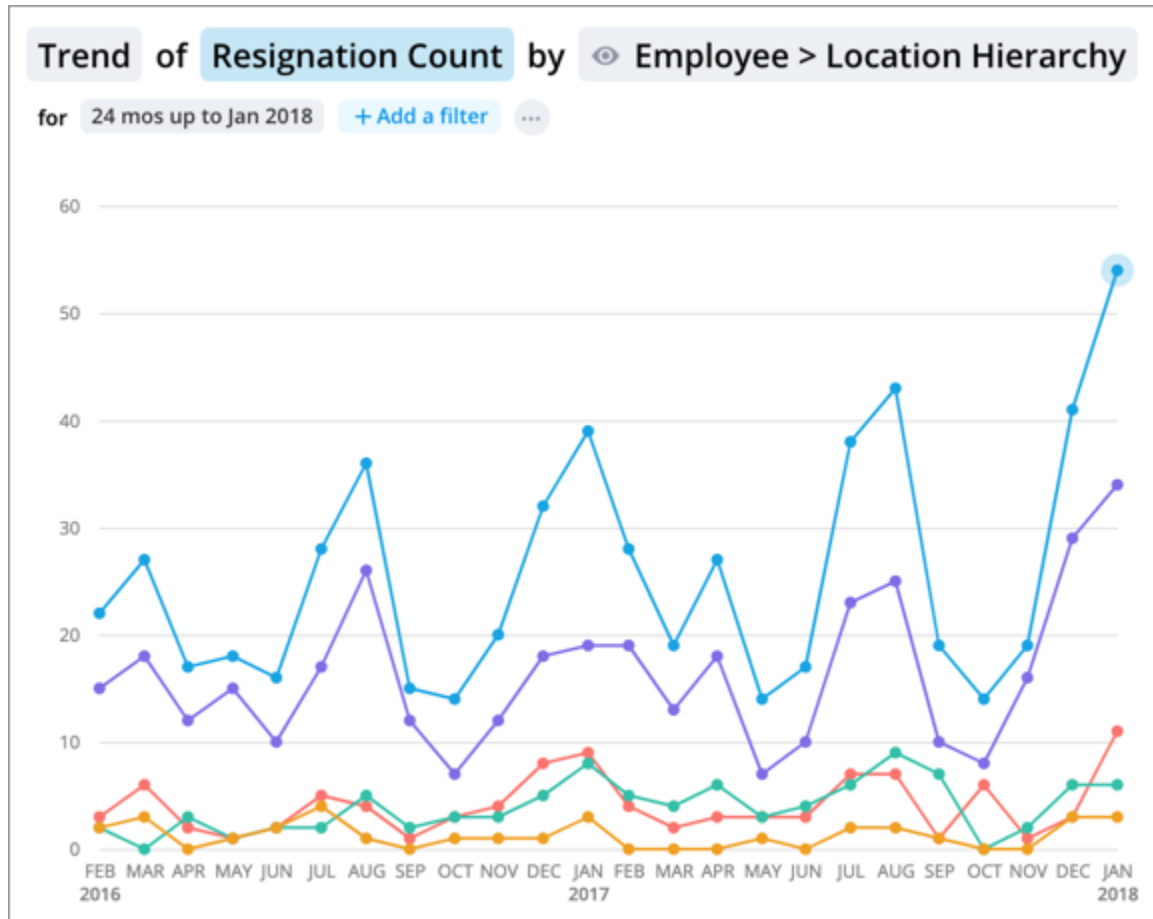
## Over-time

Over-time metrics represent a collection of values that occur over a time range. Usually these metrics are counting events that happened in a specific period (e.g. a month). Resignation count is an example of an Over-time metric, as it represents the total number of employee resignations in a specific period.

Over-time metrics are additive over time, meaning that the metric values for multiple time periods can be added together. For example, the Resignation Count in January 2018 can be added to the Resignation Count in February 2018 for a total Resignation Count for both months. Use the trailing time calculation to add the metric values for multiple periods together.

The chart below shows a Trend chart of Resignation Count with a 24 month timeline and a December 2018 end point.

The data within each time period (month, in this case) represent the resignations during that period.



## Drill down and up in a visual

Drill through different levels of your hierarchical data to reveal additional details.

### Overview

When a visualization has a hierarchy, you can drill down or up to navigate and view data for the different levels of the hierarchy. The drill path is part of the analysis context so it acts as a filter that allows you to narrow down the data to a specific population.

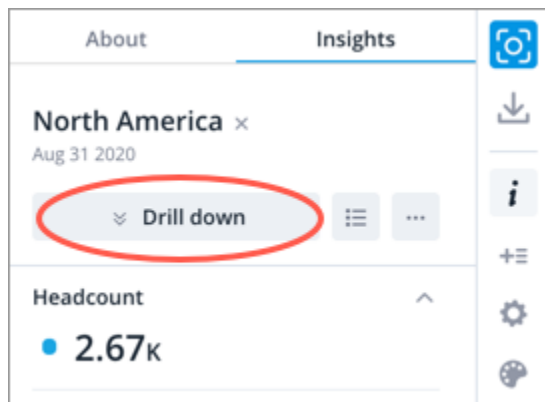
Let's say, you're looking at the **Breakdown of Headcount by Location Hierarchy**. The Location Hierarchy may contain the following levels: Region, Country, State/Province, and City. By default, the visual shows the top level of the hierarchy so you would see Headcount for each Region: North America, EMEA, APAC, and South America. By double-clicking a chart item, you can drill down to the next level of the hierarchy to see a more detailed picture. In this example, let's say you drilled down on the North America chart item, you would see Headcount for each country: United States and Canada.

When you have drilled down in a visual, the drill path appears as a token in the Analysis Context toolbar. Click the token to reveal the entire drill path, as shown in the following screenshot.

You can click different parts of the drill path to drill back up in the visual. Click **See all** to edit the filter.



**Tip:** Can I drill down?

Not sure if your visualization contains a hierarchy? Select a chart item and if you see the drill actions in the Insights tab of the Info panel, your visualization has a hierarchy.





## Drill down in a visual

Do one of the following:


- Double-click a chart item.
- Select a chart item and then click the **Drill down** button  on the **Insights** tab of the **Info** panel.
- Right-click a chart-item and then click the **Drill down** button  on the **Visual Item Actions** menu.

## Drill up in a visual

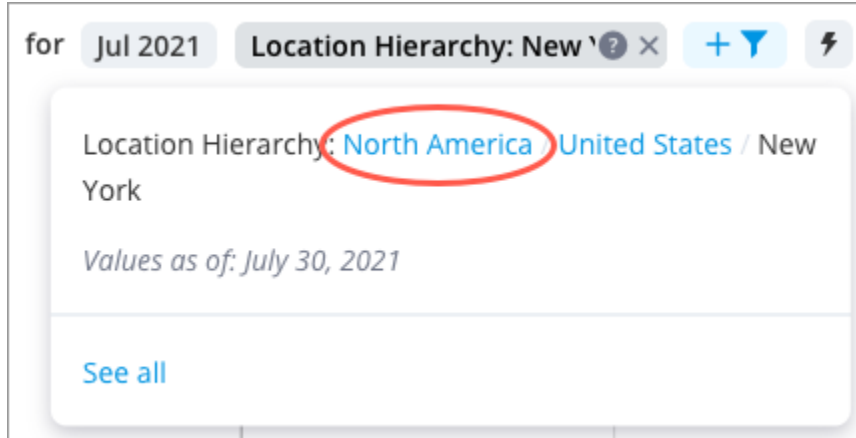
Do one of the following:

- Select a chart item and then click the **Drill up** button  on the **Insights** tab of the **Info** panel.
- Right-click a chart-item and then click the **Drill up** button  on the **Visual Item Actions** menu.

**Tip:**

- To quickly drill back up to the highest level of the hierarchy, hover over the drill path token in the Analysis Context toolbar, and click the **Remove** button .

- Click the drill path token in the **Analysis Context** toolbar to reveal the entire drill path. Click different parts of the drill path to drill back up in the visual.



## Add traffic lighting rules

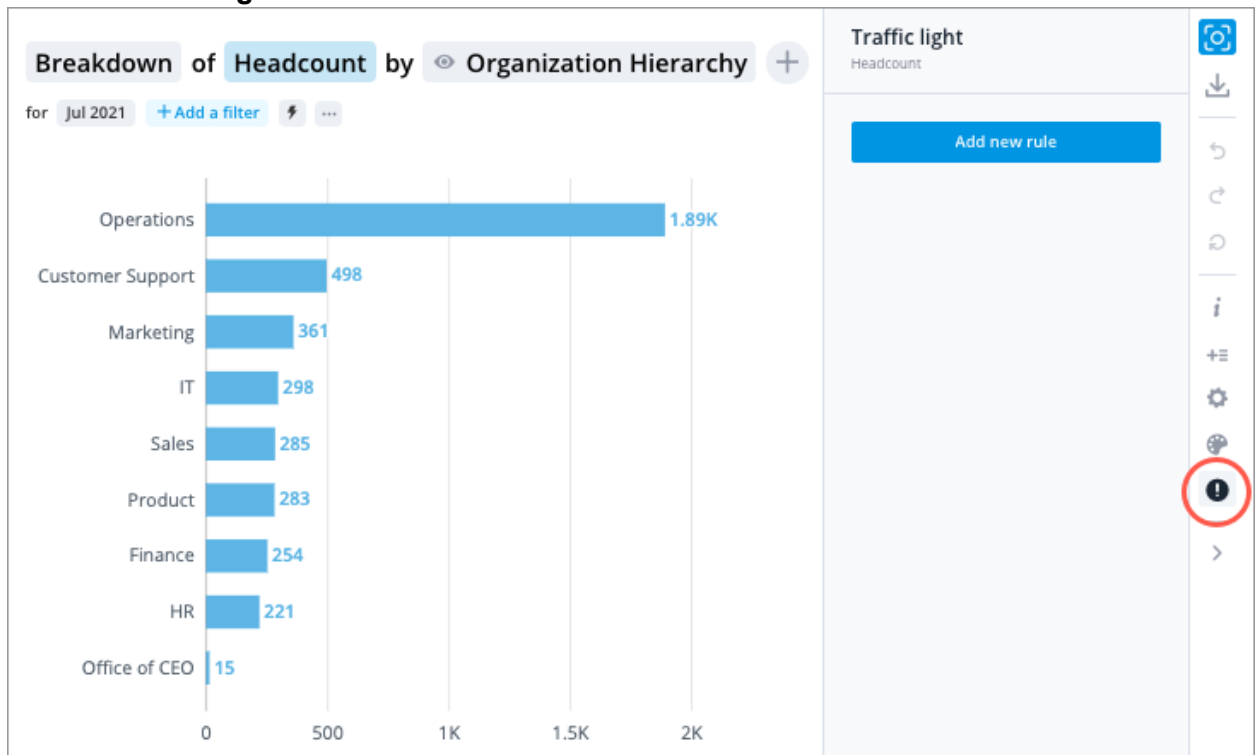
Set conditional formatting rules to apply traffic light colors to your data.

### Note:

- Traffic lighting can be added to the following visual types:
  - Breakdown
  - Trend (with no groupings)
  - Trend breakdown (with no groupings)
  - Table (with one metric)
- The following limitations exist when adding traffic lighting to the Table visual:
  - A custom time period can not be set when using the Change in metric value rule type. You can only use the Same period, previous year or Previous period presets.



1. Click the **Traffic light** button  on the **Visual Actions** menu.



2. Click **Add new rule** in the **Traffic light** panel.
3. Select one of the following rule types:

**Note:** The following table uses the example where traffic lighting is being applied to a Breakdown of Headcount by Organization Hierarchy. As shown in the previous screenshot, the visual items consist of the groupings: Operations, Sales, Finance, and more.

Rule Type	Description	Explanation
Metric value	The metric value for each visual item is compared to a target value.	Rule: If the metric value is less than 250, traffic light as Bad. For example, the Headcount for Sales is compared to the target value of 250 in the selected period. If the Headcount value for Sales is less than 250, then the visual item will be highlighted in red.

Change in metric value	The metric value for each visual item in the selected time period is compared to the metric value from a previous time period.	<p>Rule: If the change from February 2020 is less than 5%, traffic light as Good.</p> <p>For example, the Headcount for Marketing is compared to the Headcount for Marketing in February 2020. If the percentage change from the previous time period is less than 5%, then the visual item will be highlighted in green.</p>
Difference from group	The metric value for each visual item is compared to the metric value of another population.	<p>Rule: If the difference from Women is greater than 20%, traffic light as Bad.</p> <p>For example, the Headcount for Marketing is compared to the Headcount for Women in Marketing. If the percentage change from the other population is greater than 20%, then the visual item will be highlighted in red.</p>
Difference from another metric	The metric value for each visual item is compared to another metric.	<p>Rule: If the difference from Employee Exit Count is greater than 500%, traffic light as Bad.</p> <p>For example, the Headcount for Finance is compared to the Employee Exit Count for Finance. If the percentage change from the other metric is greater than 500%, then the visual item will be highlighted in red.</p>

Difference from metric overall	The metric value for each visual item is compared to the overall value of another metric.	Rule: If the difference from Employee Exit Count is greater than 200%, traffic light as Concerning. For example, the Headcount for Finance is compared to the Employee Exit Count for the entire organization. If the percentage change from the overall value of the other metric is greater than 200%, then the visual item will be highlighted in amber.
--------------------------------	---	---

4. Depending on the rule type you selected, do the following:

Rule	Do this
Metric value	Skip to step 5.
Change in metric value	<ol style="list-style-type: none"> <li>Click <b>Select a time period</b>.</li> <li>Select one of the preset options or click Add time period to define a custom time period.</li> </ol>
Difference from group	<ol style="list-style-type: none"> <li>Click <b>Select a group</b>.</li> <li>In the <b>Filter</b> picker, select the attribute values that describe the population you want to compare for the traffic light, and then click <b>Apply &gt; Done</b>.</li> </ol>

- c. **Optional:** Add additional filters to refine the population by clicking the group that you added.

Difference from  
another metric

- Click **Select a metric**.
- In the **Metric** picker, select the metric you want to compare for the traffic light.

Difference from metric overall

- Click **Select a metric**.
- In the **Metric** picker, select the metric you want to compare for the traffic light.
- Optional:** Click **Add filter** to refine the population of the comparison metric.

**Note:** The analysis context for your visual (filters, assumptions, and security permissions) will also be applied to the comparison metric. If any part of the analysis context cannot be applied to the comparison metric, you'll see the **Some filters don't apply** note in the **Insights** tab of the **Info** panel. Expand the note and click **Inspect context** to find out what parts of the analysis context has been applied to the comparison metric.

- Define the conditional expression under **Is** in the Rule panel. Select the condition and then type the target value. For example, Less than 50, Between 40% and 50%, or

Greater than 20%.

**Note:** For the Between conditional expression, the lower limit value is included and the upper limit value is excluded.

6. Set the traffic light color for the rule under **Traffic light as**:
  - Bad: If the metric value meets the rule, the visual item will be highlighted in red.
  - Concerning: If the metric value meets the rule, the visual item will be highlighted in amber.
  - Good: If the metric value meets the rule, the visual item will be highlighted in green.
7. Click **Create**.
8. Repeat steps 2 to 7 to add additional rules.

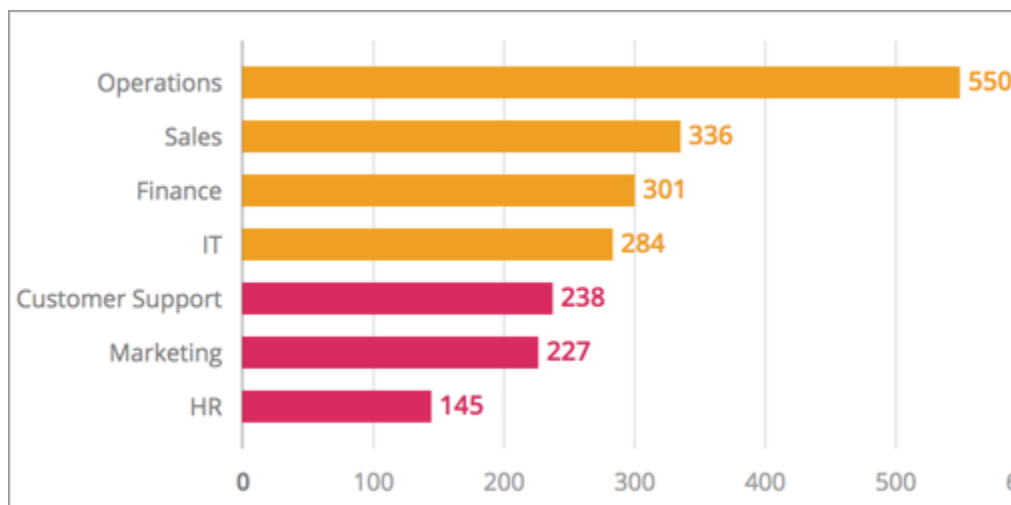
## How traffic lighting rules are evaluated

The traffic lighting rules are evaluated in the order they appear in the Info panel from top to bottom. Once a rule is met, the remaining rules are not evaluated.

For example, you applied the following traffic lighting rules to the **Breakdown of Headcount** grouped by **Organization Hierarchy**:

- Metric value is greater than or equal to 250. Traffic light as Concerning.
- Metric value is greater than 500. Traffic light as Good.
- Metric value is less than 250. Traffic light as Bad.

As shown in the following illustration, the headcount for Operations is 550 and its metric value is highlighted as concerning (amber) and not good (green).



In this case, the headcount for Operations meets the first condition, so the remaining rules are not evaluated.

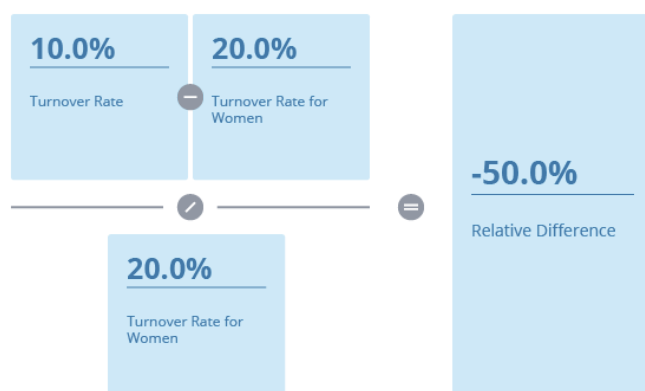
## How the difference between metric values is calculated

When comparing metric values using percentages, the relative difference is calculated by subtracting the primary (reference) metric from the secondary (comparison) metric, and then dividing the difference by the secondary metric.

For example, you want to compare the overall Turnover Rate to the Turnover Rate for women, where:

- The overall Turnover Rate is 10.0% (primary metric)
- The Turnover Rate for Women is 30.0% (secondary metric)

The relative difference or percentage change is calculated as follows:



This formula is also used when evaluating the conditional rules for analysis email delivery and traffic lighting.

# Groups and key groups

Groups and key groups are custom sets of attribute values that allow you to quickly slice and dice your data. For example, you can create a group named the Pacific Region that consists of the attribute values Calgary, Edmonton, Las Vegas, San Jose, and Vancouver. Once saved, you can use the group to focus your chart, filter your data, and compare against others.

If you are constantly recreating and applying the same filter to your charts, we recommend that you save the attribute values as a group or key group for future use. This will allow you to focus on the analysis population that's most important to you.

## Create a group

Save specific values of an attribute as a group.

To manage your groups, search for the attribute that it was created under and click the Edit button in the upper-right corner of the Groups pane. From here, you can edit, share, duplicate or delete your groups.

**Prerequisites:** To perform this task, you must have the Create Analysis Context capability.

You can create and reuse groups in the following workflows:

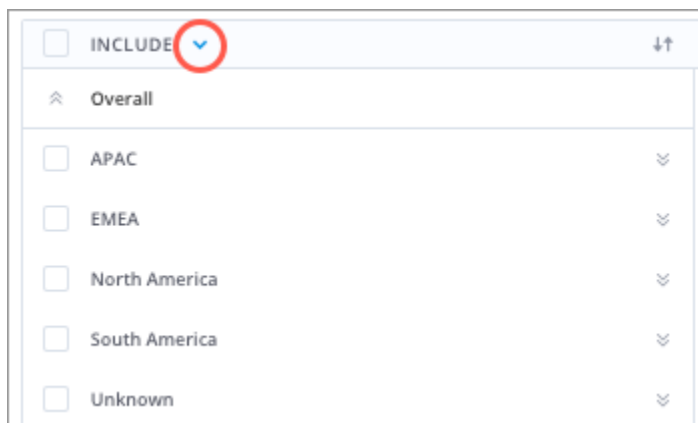
Add filters

Save frequently used analysis contexts as groups.


1. On the **Analysis Context** toolbar, click **Add a Filter**.
2. In the **Filter** picker, select the attribute values that define the population.

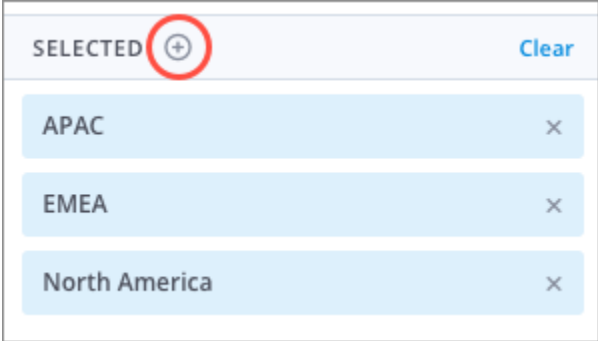
**Note:** Using the Filter picker in full screen

- Attribute values can be arranged into levels, so you may have to drill through multiple levels to find the value you want to include or exclude.
- Switch between the include and exclude option by clicking the **Include/Exclude** arrow.







3. In the **Selected** pane, click the **Save as a Group** button .

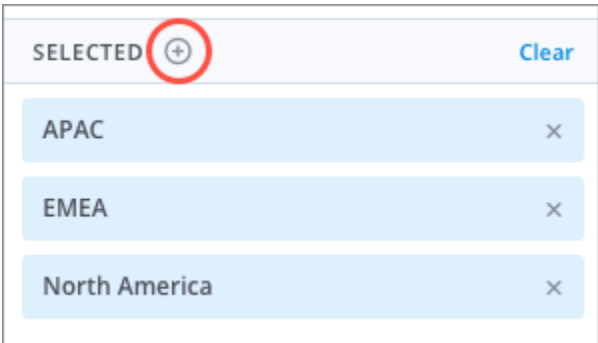


4. In the **New Group** dialog, type a name for the group and click **Save**.  
**Result:** The group is saved under the attribute and can be reused for add focus, filter, and comparison workflows.

### Add focus

Save frequently displayed group by attribute values as groups.

1. In the **Group By** picker, click the **Add focus** button .
2. In the **Focus On** picker, select the attribute values you want to include.
3. In the **Selected** pane, click the **Save as a Group** button .


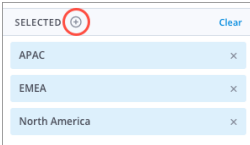

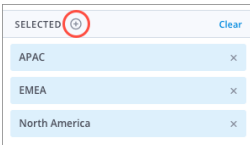


4. In the **New Group** dialog, type a name for the group and click **Save**.  
**Result:** The group is saved under the attribute and can be reused for add focus, filter, and comparison workflows.

### Comparison

Save frequently used comparators as groups.

When	Do this
Working with charts	1. Click the <b>Compare to</b> button  <b>&gt; Group</b> .

	<ol style="list-style-type: none"> <li>In the <b>Filter</b> picker, select the attribute values that define the population.</li> <li>In the <b>Selected</b> pane, click the <b>Save as a Group</b> button .</li> </ol>  <ol style="list-style-type: none"> <li>In the <b>New Group</b> dialog, type a name for the group and click <b>Save</b>.  <b>Result:</b> The group is saved under the attribute and can be reused for add focus, filter, and comparison workflows.</li> </ol>
In Compare	<ol style="list-style-type: none"> <li>In the <b>Compare to</b> panel, click <b>Create a Group &gt; Add filter</b>.</li> <li>In the <b>Filter</b> picker, select the attribute values that define the population.</li> <li>In the <b>Selected</b> pane, click the <b>Save as a Group</b> button .</li> </ol>  <ol style="list-style-type: none"> <li>In the <b>New Group</b> dialog, type a name for the group and click <b>Save</b>.  <b>Result:</b> The group is saved under the attribute and can be reused for add focus, filter, and comparison workflows.</li> </ol>

## Create a key group

Save values of multiple attributes as a key group.

**Prerequisites:** To perform this task, you must have the Create Analysis Context capability.

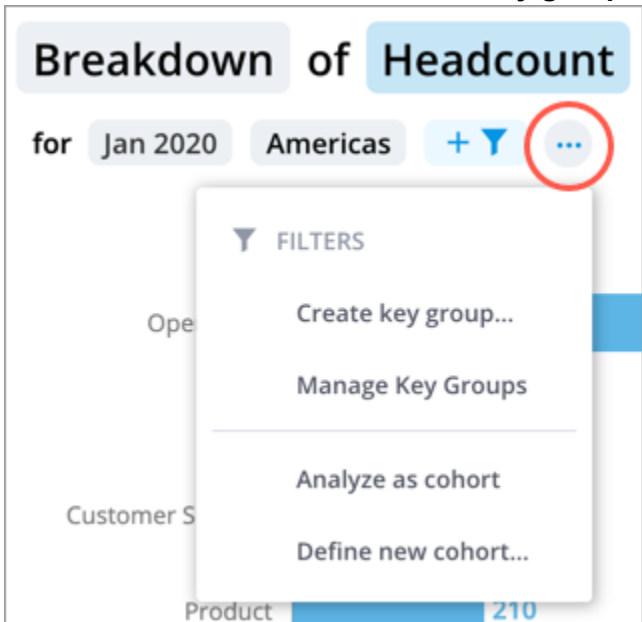
You can create and reuse key groups in the following workflows:

### Add filters

Save frequently used analysis contexts as key groups.

- On the **Analysis Context** toolbar, click **Add a Filter**.
- In the **Filter** picker, select the attribute values that define the population.
- When finished, click **Apply**.
- Repeat steps 1 to 3 to add additional filters.

- To save your analysis context as a key group, on the **Analysis Context** toolbar, click the **More actions** button **...** > **Create a key group**.



- In the **New Key Group** dialog, type a name for the key group and click **Save**. The description will appear when users hover over the tokens and comparisons that the key group is used in to help them understand what they're looking at.  
**Result:** The key groups can be reused for filter and comparison workflows and the filter tokens in the Analysis Context toolbar are replaced by the key group token.

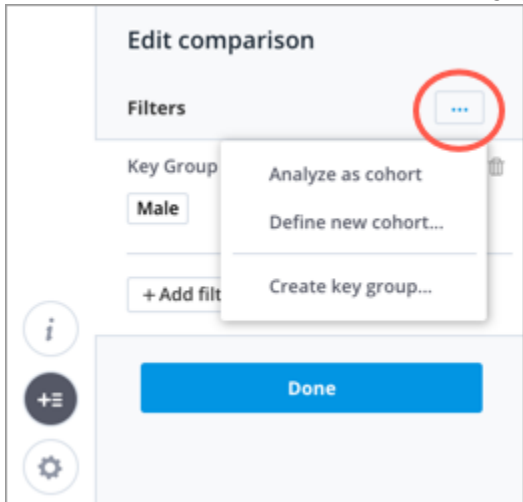
**Note:** If your analysis or comparison population contains attribute values from only one attribute, it will also be saved as a key group.

## Comparison

Save frequently used comparators as key groups.

When	Do this
Working with charts	<ol style="list-style-type: none"> <li>Click the <b>Compare to</b> button <b>+≡</b>.</li> <li>Click <b>Group</b>.</li> <li>In the <b>Filter</b> picker, select the attribute values that define the population.</li> <li>When finished, click <b>Apply</b>.</li> <li>Add additional filters to your comparison population: <ol style="list-style-type: none"> <li>Select the comparison population.</li> <li>Click <b>Add filter</b>.</li> <li>Repeat step 3 and 4.</li> </ol> </li> </ol>

- In the upper-right corner of the **Edit comparison** panel, click the **More actions** button **\*\*\*** > **Create key group**.




- In the **New Key Group** dialog, type a name for the key group and click **Save**.

The description will appear when users hover over the tokens and comparisons that the key group is used in to help them understand what they're looking at.

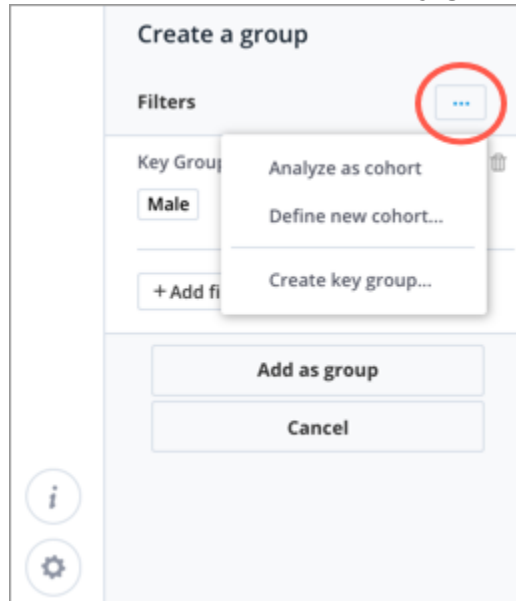
**Result:** The key groups can be reused for filter and comparison workflows and the filter tokens in the Analysis Context toolbar are replaced by the key group token.

**Note:** If your analysis or comparison population contains attribute values from only one attribute, it will also be saved as a key group.

In Compare

- On the comparison grid, click the **Add Comparison** button .
- In the **Compare to** panel, click **Create a group**.
- Click **Add filter**.
- In the **Filter** picker, select the attribute values that define the population.
- When finished, click **Apply**.
- Repeat steps 3 to 5 to add additional filters to your comparison population.

7. In the upper-right corner of the **Create a group** panel, click **More actions** button \*\*\* > **Create key group**.



8. In the **New Key Group** dialog, type a name for the key group and click **Save**.

The description will appear when users hover over the tokens and comparisons that the key group is used in to help them understand what they're looking at.

**Result:** The key groups can be reused for filter and comparison workflows and the filter tokens in the Analysis Context toolbar are replaced by the key group token.

**Note:** If your analysis or comparison population contains attribute values from only one attribute, it will also be saved as a key group.

## Create an analysis

Turn your charts into a data-driven narrative or dashboard that you can share with stakeholders.

### Creating a new analysis

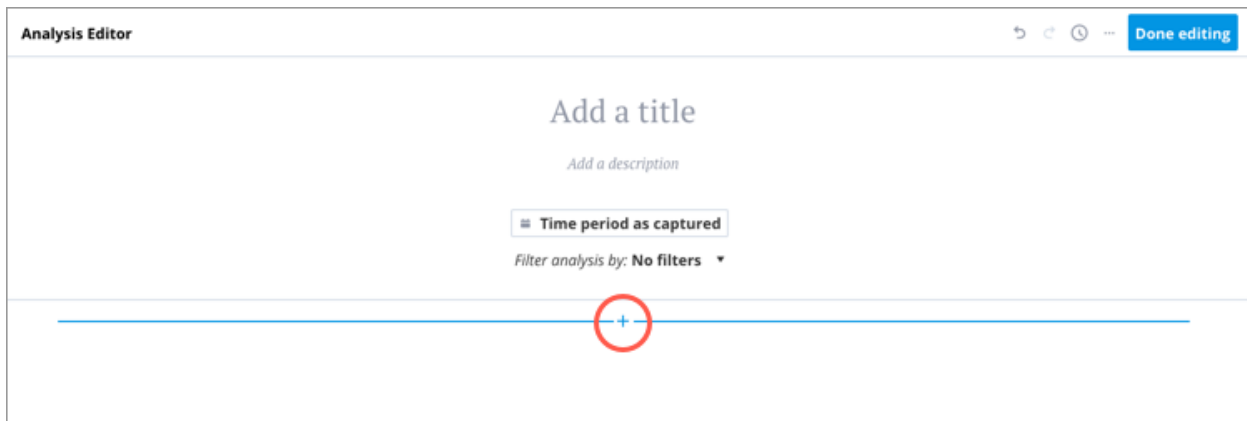
1. On the navigation bar, click **Analyses**.
2. In the upper-right corner of the Analyses room, click **New analysis**.  
**Result:** The Analysis Editor appears.
3. In the **Title** box, type a title for your analysis. The title will appear in search results and analysis links.
4. In the **Description** box, type a subtitle or description for your analysis.

# Authoring content

Content is added as a series of cards. When authoring your analysis, imagine your content organized in a series of rows and columns. As you insert cards, horizontal dividers will appear separating content into different rows. When laying out your analysis, keep in mind that all cards within a row will be displayed on one slide in presentations and exports.

## Insert a card

In a new analysis, click the **Insert** button  to insert a card in a new row.



## Insert more cards

Additional cards can be inserted to create a new row or new column within the existing row.


To insert a card, hover over the location where you want to insert the card and then click the Insert button when it appears. New rows can be inserted above or below existing rows while columns can only be inserted from the right side of a row.

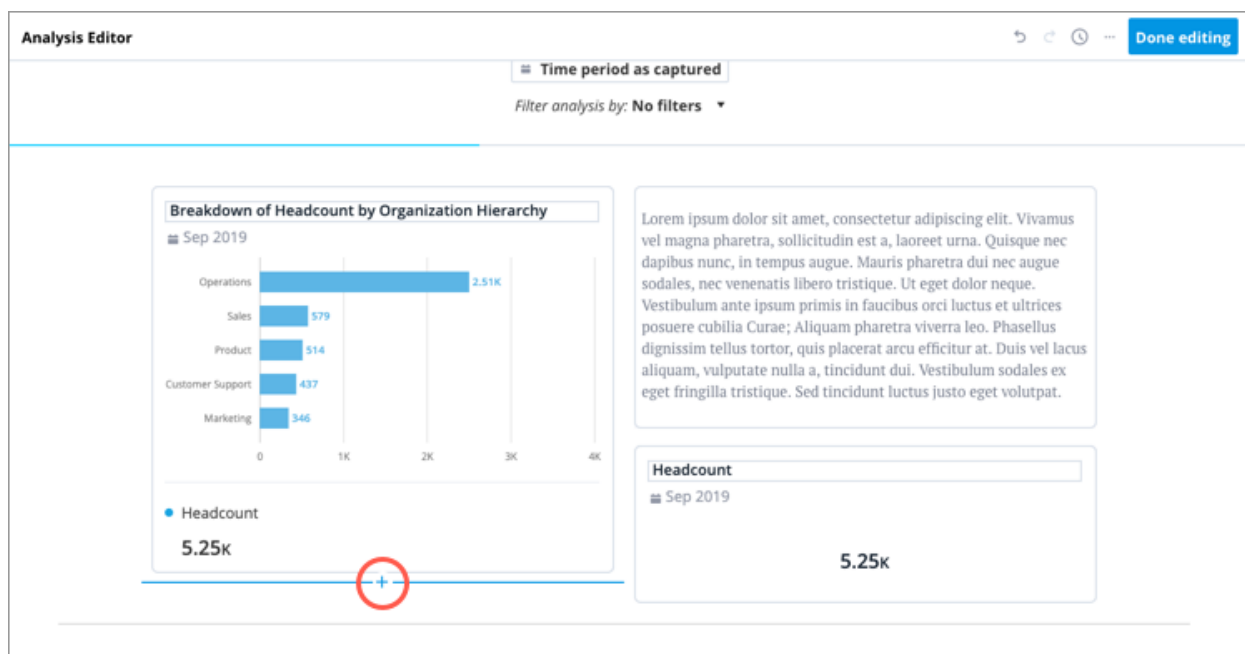


**Note:** Additional cards cannot be inserted next to header cards because they span the entire width of the row.

## Stack cards in columns

If the columns in a row have different heights, you can insert additional cards to stack cards on top of each other.

To insert a card, hover over the column where you want to insert the card and then click the **Insert** button  when it appears.



**Note:** To provide the best viewing experience when presenting or exporting your analysis, we recommend that you avoid creating columns that are too tall. This is because all content in a row will scale to fit on one slide.

## Card types

You can build your analysis by adding a combination of headers, charts, text, links, and images. This section describes the card types in detail.

### Header

Header cards act as section dividers for your analysis:

- Content is hidden under each header in Collapsed view.
- Headers will appear on a separate slide in Full screen view, Browser window view, and exports.

Header cards span the full width of the row

To insert a header card, click the **Insert** button  > **Header** button .

**Tip:** Subheadings can be added by inserting a Text card and applying an H2 paragraph style to the text.

## Text

You can insert text cards anywhere in your analysis to describe and provide guidance for your charts.



Text editing options include:

- Bold, italicize, and underline text for emphasis
- Insert inline links to an analysis or external webpage
- Create bulleted and numbered lists

To insert a text card, click the **Insert** button  > **Text** button .

## Chart

You can create charts from scratch or insert a previously saved chart.

- To insert a chart card, click the **Insert** button  > **Add a chart** button  and do one of the following:
  - To insert previously saved charts, select the captures you want to insert and then click **Done**. Captures are inserted to the analysis in the order that they were selected.
  - To insert a new chart, click **Create new chart**.
    - i. Build your chart by:
      - Selecting the visual type, metrics, and group by attribute for your chart.
      - Changing the analysis context.
      - Customizing the chart appearance and settings in the Side panel.
      - Adding a title to your chart.
      - Adding a description for your chart in the About tab of the Info panel. Think of the description as a piece of guidance to help users understand what they're looking at when viewing the chart in full screen. You can also show the description on the card after it has been inserted in the analysis.
    - ii. When finished click **Add and Close**.

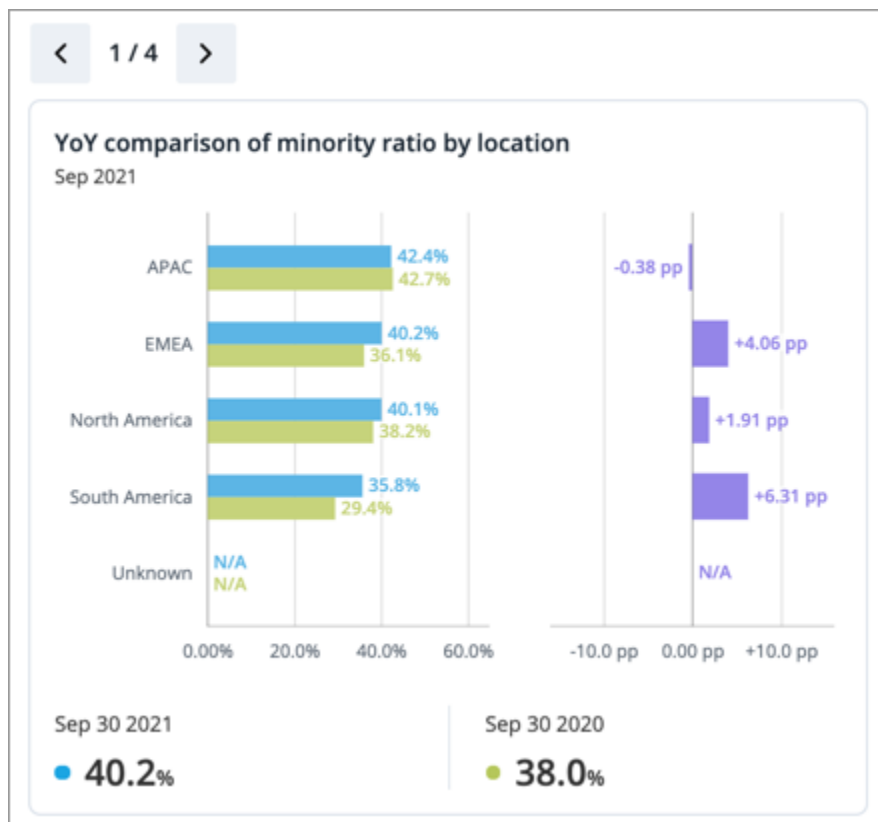
### Tip:

- If you are creating multiple charts, click Add and New to insert the created chart to your analysis and open a new chart.
- If viewers don't have data access to a visual in an analysis, the visual will automatically be hidden.



## Carousel

Use the Carousel card to display two or more chart cards in a slideshow format that viewers can cycle through.



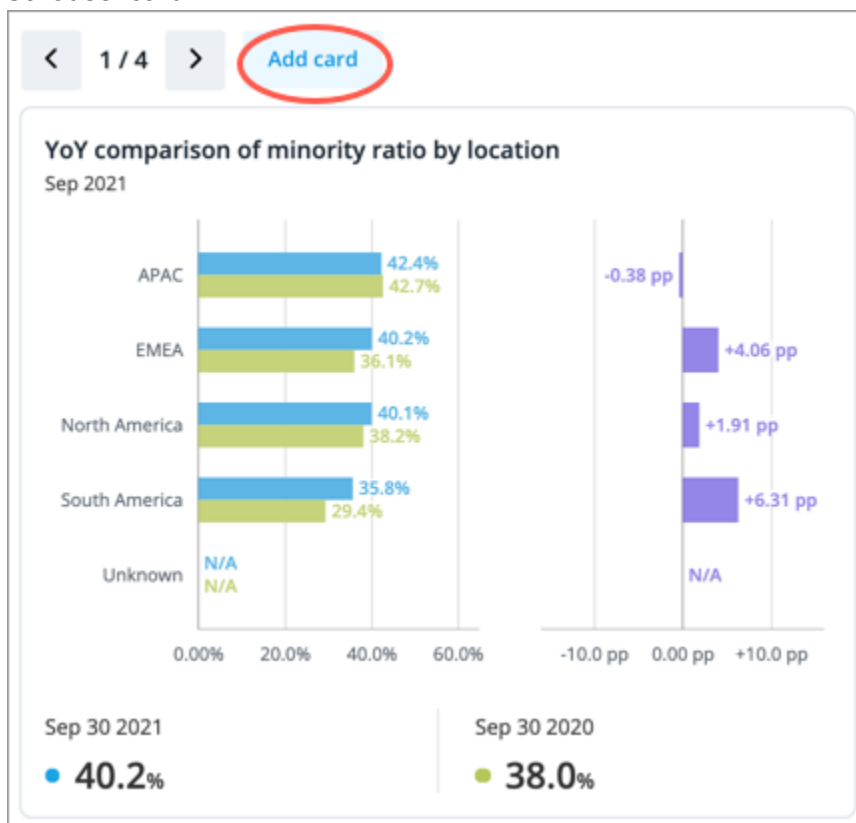
### Note:

- You can add a maximum of 10 visuals to a carousel.
- Only the first visual in a carousel will be included in analysis emails, visual downloads, and analysis downloads.
- If viewers don't have data access to a visual in an analysis, the visual will automatically be hidden.

To insert a carousel:

1. Click the **Insert** button > **Carousel button** .
2. Add charts to your carousel by selecting previously saved charts from your captures or creating new charts.
3. When finished, click **Add**.



- To add or edit the cards in a carousel, click **Add card** in the upper-left corner of the Carousel card.



## Link

You can link to other analyses or external webpages that contain related content by inserting a link card.

To insert a link:

- Click the **Insert** button  > **Link** button .
- In the **Link** dialog, do the following:
  - Type the display text for your link.
  - Type the name of the analysis you want to link to or the URL of the webpage.
  - Optional:** For analysis links, change how the link preview looks.
- When finished, click **Save changes**.

## Tip:





- Leave the **Display text** box blank if you want to use the name of the analysis as the display text.
- Before you search for an analysis, you'll find a list of the five analyses that you most recently viewed.
- Search results include all Guidebook analyses, analyses that you own, and analyses that have been shared with you.

- The default URL scheme for external webpages is https.



## Image

You can add a JPG, PNG, or GIF image, such as your company logo, to your analysis by inserting an image card. Images must be smaller than 5 MB.

To insert an image:

1. Click the **Insert** button  > **Image** button .
2. Select an image to upload.
3. **Optional:** Enter alternative text that describes the image for visually-impaired users.
4. Click **Add image**.
5. **Optional:** Adjust the width between **Half** width  or **Full** width .

To replace an image:

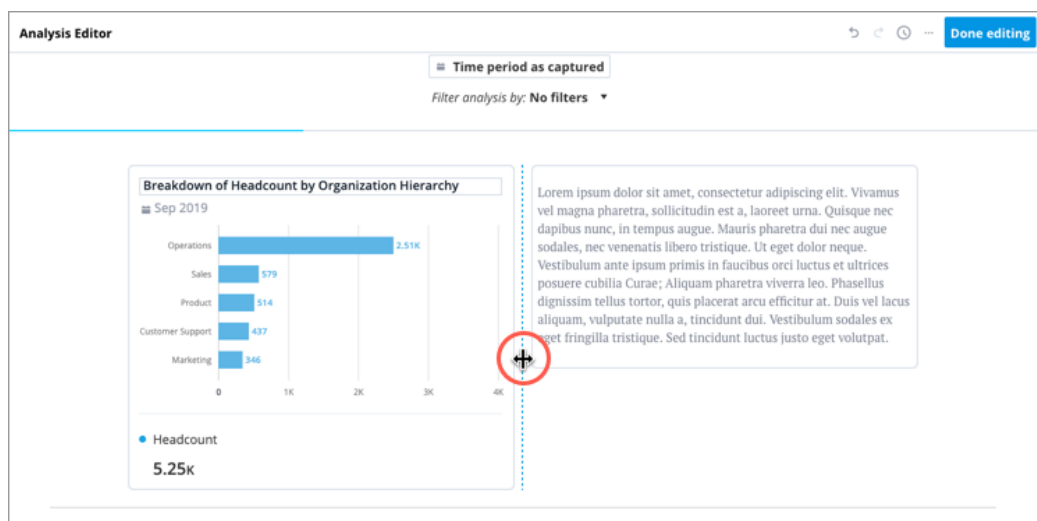
1. Hover over the image card and click the **Edit** button .
2. Click the **Delete** button .
3. Select or drag in a new image.
4. Click **Add image**.

## Changing the layout

You can customize the layout of your analysis by changing the width of the columns and rearranging the cards.

### Resize columns

To resize columns, click the dotted line and drag it to the desired width.

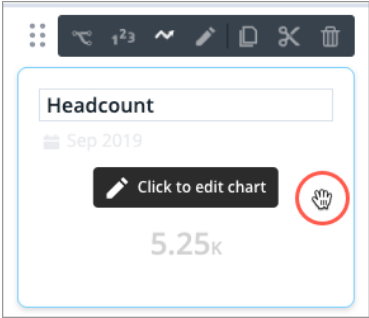



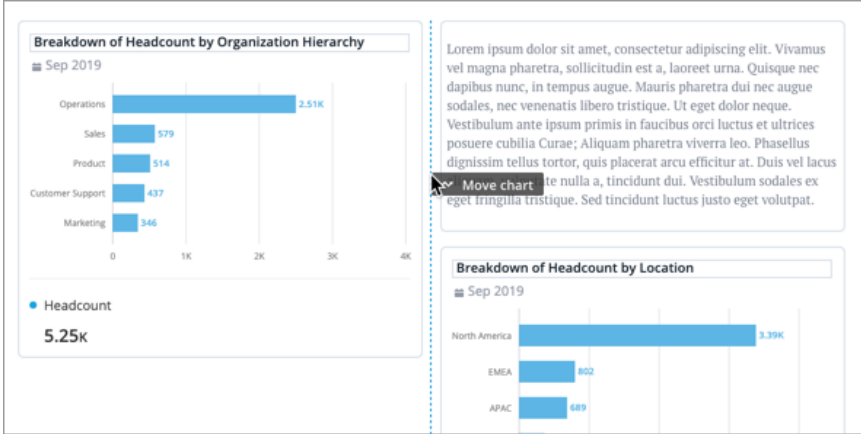



**Note:**

- Chart cards will appear differently based on the width of the column. As the columns narrow, the cards will be optimized for readability:
  - Legends will be hidden from visual cards.
  - Some chart items will become hidden on visual cards.
  - The names and values on metric cards will stack on top of each other.
- The minimum width of visual cards depends on the visual type that is displayed. For example, a Breakdown visual card has a smaller minimum width than an Organization visual card.

Move cards

To move cards, do one of the following:

To	Do this
Drag and drop	<p>Hover over the card until the cursor changes to the icon. Then click and drag the card to the desired location.</p>  <p><b>Tip:</b></p> <ul style="list-style-type: none"> <li>• If you're having trouble getting the <b>Grip</b> icon to appear, try moving your cursor closer to the <b>Move</b> button .</li> <li>• When moving cards, the blue horizontal and vertical lines indicate a drop zone and shows you where the card will be placed.</li> </ul>

	
Cut and paste	<p>Hover over the card and click the <b>Cut</b> button . Hover over the location where you want to paste the card and then click the <b>Insert</b> button  &gt; <b>Paste</b> button .</p>

## Customizing viewer settings

When you've finished adding content, you can change the following settings to control whether or not viewers can change the analysis context.

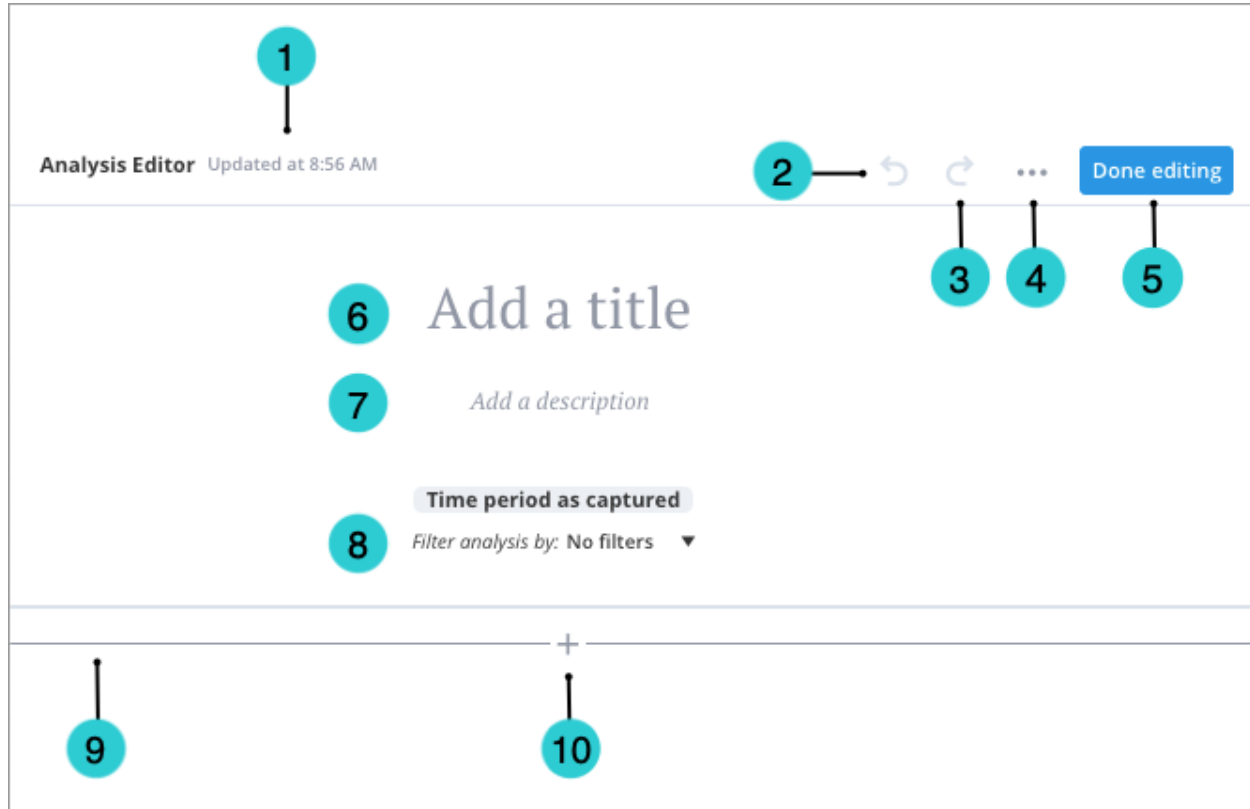
- Set a Driving Subject to allow viewers to add filters on the analysis level. If applicable, filters will be applied to all charts in the analysis.
- Remove the local context (filters that were applied at the time of creation) from the charts in your analysis.
- Refresh analysis data to have charts in the analysis show data for the latest time period or a specific time period.

# Analysis Editor

Learn more about the Analysis Editor and how to configure your analysis for viewers.

## Overview

The Analysis Editor is what you will use to create and edit your analyses, as shown in the following illustration. The Analysis Editor allows you to enter or change the title of your analysis and insert content including text, charts, links to other analyses, and images.



- Autosave timestamp: This timestamp reflects the last time at which your analysis changes were automatically saved.
- Undo button: Undo your last action.
- Redo button: Redo your last action.
- More options:
  - Update time period: Have the analysis show data for the latest time period or a specific time period.
  - Make analysis dynamic: Remove the local context (filters that were applied at the time of creation) from the charts in the analysis.
  - Edit preview appearance: Change how links to this analysis appear.
- Delete: Remove your analysis that is no longer needed.
- Done editing: Close the Analysis Editor.
- Title box: Add a title for the analysis. This title appears in search results and is used in analysis links.
- Description box: Add a subtitle or description for the analysis.
- Driving Subject: Set a Driving Subject to allow viewers to change the analysis context by applying filters to all the charts in the analysis at once.
- Divider: A horizontal line that separates content into different rows.
- Insert button: Insert content such as headings, text, charts, and analysis links.

## The Driving Subject

It can be difficult for viewers to determine how filters will be applied to charts in an analysis when the analysis contains charts that look at different subjects. To simplify the viewing

experience, viewers will not be able to add filters on the analysis level (change the analysis context) by default.

However, you can allow viewers to change the analysis context for all charts in an analysis at once by setting a Driving Subject. We recommend that you do this when the majority of the charts in your analysis look at a single subject such as Employees. When you set a Driving Subject for your analysis, viewers will only be able to add filters for the subject. After a Driving Subject is selected, you can also add a set of default filters to your analysis. Viewers will not be able to remove the default filters and any filters that they add will be applied on top of the default filters.

**Example:** Adding filters at the analysis level

You're viewing an analysis that contains the following charts:

- Breakdown of Headcount by Organization
- Breakdown of Average Performance Rating by Organization
- Breakdown of Open Positions by Organization

The Driving Subject for the analysis is the Employee subject.

You want to look at data for first year employees in Marketing and Sales, so you change the analysis context by adding the following filters:

- Tenure: 0-1yr
- Organization: Marketing, Sales

If applicable, filters will be applied to all charts in the analysis at once. The following table describes how the filters are applied.

Chart	Applied filters
Breakdown of Headcount	<ul style="list-style-type: none"> <li>• Tenure: 0-1yr</li> <li>• Organization: Marketing, Sales</li> </ul>
Breakdown of Average Performance Rating	<ul style="list-style-type: none"> <li>• Tenure: 0-1yr</li> <li>• Organization: Marketing, Sales</li> </ul>
Breakdown of Open Positions	<ul style="list-style-type: none"> <li>• Organization: Marketing, Sales</li> </ul>

In this example, the analysis contains charts that look at multiple subjects. The Headcount and Average Performance metrics are based on the Employee subject while the Open Positions metric is based on the Requisition subject. The Tenure filter can only be applied to metrics that are based on the Employee subject, so the filter is dropped from the chart Breakdown of Open Positions. The Organization filter can be applied to metrics that are based on the Employee or Requisition subject, so the filter is applied to all charts in the analysis.

To set a Driving Subject for your analysis:

- In the Analysis Editor, click the drop-down arrow on the right side of **Filter analysis by** and select the subject that viewers can apply filters for.

**Note:** The available subjects are determined by the charts you have in your analysis. You can only set one subject as the Driving Subject.

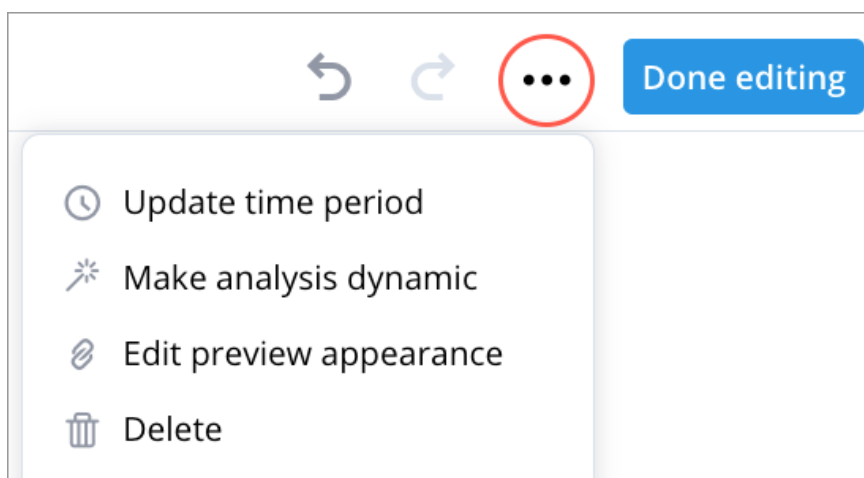
## Remove filters from charts in the analysis

When you add a chart to an analysis, the chart will retain its local context (filters that were applied at the time of creation). If you're sharing your analysis with users who have different levels of data security access, you should remove the local context from all the charts in your analysis. If you don't, viewers may not be able to see some of the charts in your analysis because they do not have sufficient data security access to the population that is specified by the applied filters. Once the local context is removed, the charts will reflect the security access of the viewer.

To remove filters from the charts:

**Note:** You cannot undo this action.

1. In the Analysis Editor, click the **More** button **...** > **Make analysis dynamic**.



2. In the **Make Analysis Dynamic** dialog, select the applied filters you want to remove.

**Note:** Only filters applied to charts during their creation (as opposed to filters applied on the analysis level) will appear.

3. Click **Apply**.

**Result:** The filters are removed from all charts in the analysis.



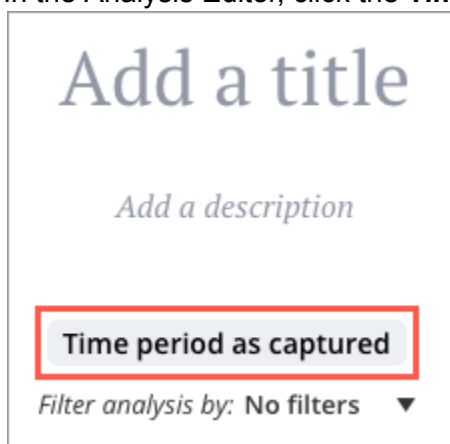
## Refresh analysis data

By default, analyses are static and show data at a fixed point in time. When you add a chart to an analysis, the chart will retain its local time context (the time period and granularity that was set when the chart was created) and the data will not change over time. However, you can automatically update your analysis so that the charts show data for the latest time period or you can manually update your analysis so that the charts show data for a specific time period.

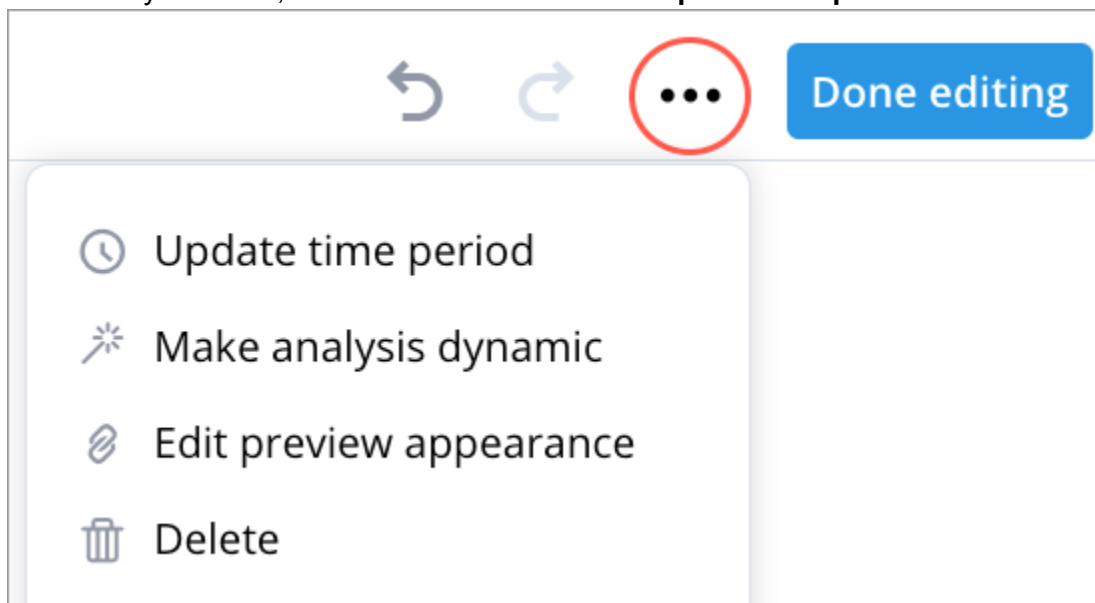
**Note:** If you set your analysis to update automatically, you'll be making your analysis dynamic. Viewers will be able to apply their own time context (change the time period) on the analysis level, which will override the local time context of all the charts in the analysis.

To set up your data refresh settings:

1. Do one of the following:
  - In the Analysis Editor, click the **Time period** label.



- In the Analysis Editor, click the **More** button **...** > **Update time period**.



2. In the **Update Time Period** dialog, choose one of the following settings:

- Time period as captured: charts will retain their local context and display data for the selected time period and granularity at which the chart was initially created.

**Note:** Charts that contain a cohort definition that uses a dynamic time context will not work correctly with this option.

- Update automatically: charts will continuously update to display data for the latest time period (even if that week, month, or year has not yet completed).

**Note:**

- You can select the time granularity to update to automatically. The data in your analysis will update depending on the granularity selected. The default granularity is months.
- To avoid displaying partial period data, select the **Update to latest complete time period** box.
- To allow viewers to change the granularity for all charts in the analysis, select the **Synchronize chart/time picker granularity** box.
- Set a specific time period: charts will display data for the selected time period.

**Note:** To apply the granularity that you selected to all charts in the analysis, select the **Synchronize chart/time picker granularity** box.

3. Click **Apply**.

**Result:** The settings will be applied to all charts in the analysis and the label under the description of your analysis changes to indicate the data refresh settings that have been applied.

**Example:** Applying auto refresh data settings to your analysis

Let's say:

- You have a chart in your analysis that shows the Breakdown of Turnover Count by Organization for July 2018 at a monthly granularity.
- The latest data that is loaded to the solution is for March 8, 2019.




The following table describes the data that is displayed in the chart based on the auto refresh data settings that have been applied to the analysis.

Auto refresh setting	Data displayed
Update automatically	Turnover Count for March, as of March 8, 2019.
Update to latest complete time period	Turnover Count for February 2019.

## Compare

View detailed data for employees, candidates, requisitions, and more.

In the Compare room you will find a comparison grid that lets you surface data about subject members such as employees, candidates, and requisitions.

	 Bobby Alfred Pastor <a href="#">Pin to compare</a>	 Sadie Cecelia Owen <a href="#">Pin to compare</a>	 High Performer 940 members <a href="#">View details</a>
Job Name	Sales Regional Director →	Plant Operations Analyst →	Senior Maintenance Engineer, #97
Tenure	0.33 yrs	1.42 yrs	1.58 yrs
Age	57 yrs	36 yrs	34 yrs
Compa Ratio	74.8%	78.9%	84.5%
Market Compensation Ratio	80.7%	101%	82.7%
Annual Base Pay	\$71.1K USD	\$30.6K USD	\$46.8K USD
Hourly Rate	N/A	\$16.1 USD	\$22.2 USD*
Time Since Promotion	0.33 yrs	1.42 yrs	1.29 yrs
Predicted Risk of Resignation	4.45%	10.3%	6.26%
Performance Rating	Level 3	Level 2	Level 4, Level 5

By analyzing attributes side by side, you can answer time-sensitive questions like:

- Should I make a counter offer to keep an employee from leaving?
- Who is the best internal candidate to fill a new leadership position?
- Do I have enough quality applicants for a requisition?

The sections in this topic describe how to analyze detailed data for employees in the Compare room.



To access Compare, on the navigation bar, click **Compare** .

## The Compare workflow

1. Add individual employees or groups to the comparison grid.
2. Analyze employee attributes side by side to answer your business questions.
3. Pin an employee to calculate the differences between attribute values and see how an individual stacks up against the group.

When you pin an employee, you are creating a baseline comparison:

- If you want to compare an employee to their direct peers, pin an employee to calculate the individual differences between attribute values.
- If you want to compare an employee to an employee group, pin an employee to visualize how the employee stacks up against the group. A Distribution visual is created to show how attribute values are distributed for a group. This allows you to assess whether an employee's attribute value is above or below the median for the group.

	 Bobby Alfred Pastor <div>Unpin</div>	 Sadie Cecelia Owen <div>Pin to compare</div>	<div>High Performer</div> <div>940 members</div> <div>View details</div>
Job Name	Sales Regional Director	Plant Operations Analyst	Senior Maintenance Engineer, +97
Tenure	0.33 yrs	+ 1.08 yrs	
Age	57 yrs	- 21 yrs	
Compa Ratio	74.8%	+ 4.06 pp	
Market Compensation Ratio	80.7%	+ 20.6 pp	
Annual Base Pay	\$71.1K USD	- \$40.5K USD	
Hourly Rate	N/A	N/A	N/A
Time Since Promotion	0.33 yrs	+ 1.08 yrs	
Predicted Risk of Resignation	4.45%	+ 5.90 pp	
Performance Rating	Level 3	Level 2	Level 4, Level 5


## Use the comparison grid

Set up the comparison grid to surface data about employees, candidates, requisitions, and more in the Compare room.

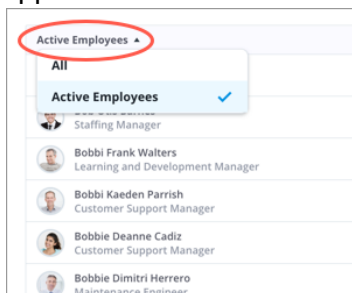
You cannot change the time context; data presented in the Compare room is from the latest period.

Set up the comparison grid

1. On the navigation bar, click **Compare**.

**Tip:** If you see employees in the comparison grid, click the **Reset** button  to start over.

2. In the **Subject** list, click **Employee**.
3. In the **Search** box, type a name and select the employee from the search results.
4. By default, only active subject members will be included in the search results. If you want to analyze a former employee in the **Compare** room, change the filter in the upper-left corner of the search results from **Active Employees** to **All**.



A greyed out photo indicates an inactive subject member in the Compare room. The word inactive will also be appended to their name.

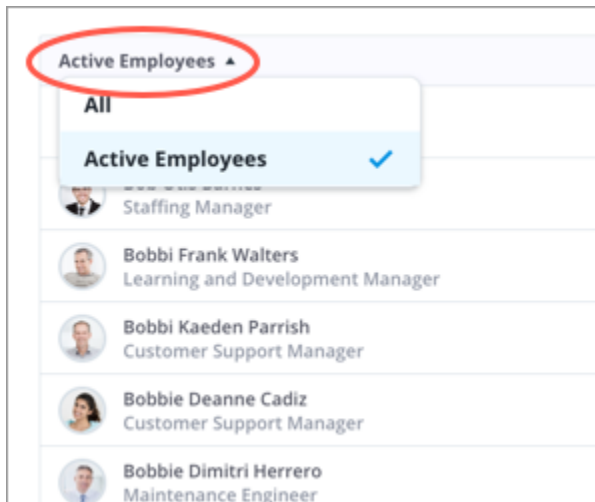
**Result:** The comparison grid appears.

Open the Compare to panel

- Click the **Add comparison** button  on the **Visual Actions** menu.

Add an employee to the comparison grid

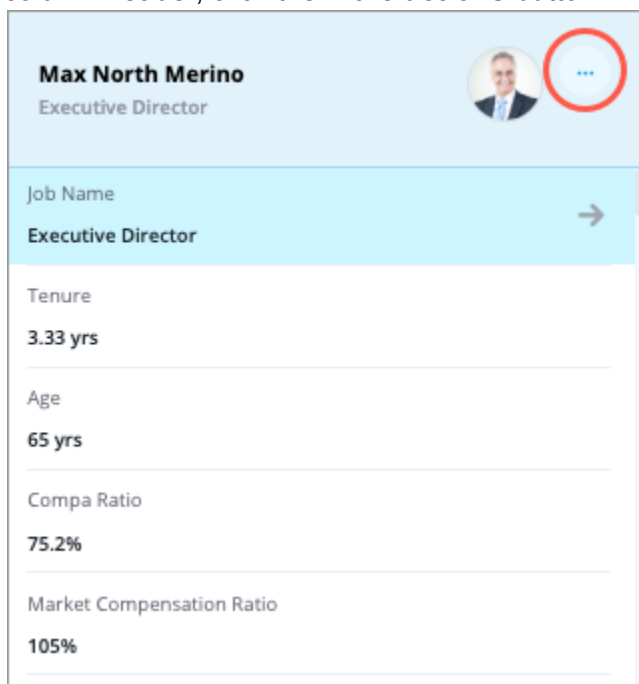
- In the **Compare to** panel, type a name in the **Search** box and select the employee from the search results.  
By default, only active subject members will be included in the search results. If you want to analyze a former employee in the **Compare** room, change the filter in the upper-left corner of the search results from **Active Employees** to **All**.



A greyed out photo indicates an inactive subject member in the Compare room. The word inactive will also be appended to their name.

You can also add employees to the comparison grid outside of the Compare room by doing one of the following:

- In View Details select the subject member you want to add to the **Compare** room. In the column header, click the **More actions** button **...** > **Add to compare**.



- If your data point has five or fewer members in the population, you can quickly add employees to the Compare room in the **Members** section in the **Insights** tab of the **Info** panel.
  - To add an individual employee to the Compare room, click the **More actions** button **...** > **Add to Compare**.
  - To add all employees at once to the Compare room, click **Add all to Compare**.

**Note:** For the Members section to appear, the following criteria must be met:

- Users must have the View Details capability.
- There must be five or fewer members in the population for the selected data point.
- The visual does not contain any comparisons. For example, the Members section will not appear if you are comparing metrics or groups.
- The visual does not contain any metrics that use a calculation concept. For example, Total Cost of Workforce or Movement metrics.

### Add a group to the comparison grid

To fully understand a situation, you should compare an individual against their direct peers, their employee group, and similar employees across the business. You can manually define the group or have one automatically generated for you.

**Tip:** To view a list of subject members or event occurrences that make up a group, click **View details** in the column header.

## Create and add a group

1. In the **Compare to** panel, click **Group**.
2. Click **Add filter**.
3. In the **Filter** picker, select the attribute values that define the population.
4. When finished, click **Apply**.
5. **Optional:** Repeat steps 2 to 4 to add additional filters.
6. Click **Add**.

## Add a similar group (find similar)

Automatically generate and add a group with similar attributes to an individual in the comparison grid.

### Note:

- The set of attributes (important properties) that are considered when finding a similar group can be customized in the studio experience.
  - By default these attributes have been configured for the Employee subject. Contact Visier Technical Support to customize the set of attributes for each subject.
  - To customize the set of attributes, select the Important Properties for the subject (Applicant, Employee, Requisition) in the Population tab of an analytic object. For more information, see [Configure populations](#).
- The similar group will only draw from the subject members (employees) that you have access to.


## How Visier finds similar groups

To train our Similarity Model, Visier's algorithm examines your historical data to determine how attribute values are related to each other. For example, when looking at the historical data for the Job Name attribute, we observed the movement of 50 Junior Software Developers. 48 of them became Senior Software Developers and 2 became Product Managers. As a result, the algorithm considers Junior Software Developers to be more related to Senior Software Developers than Product Managers. The model will use this information to identify similar subject members.

1. In the **Compare to** panel, click **Similar Group**.
2. **Optional:** Select the employee that you want the similar group to be based on. The first member in the comparison grid will automatically be selected as the member of interest. If there are multiple employees in the comparison grid, you can select the employee that

you want to find a similar group for from the **Based on** list.

**Note:**

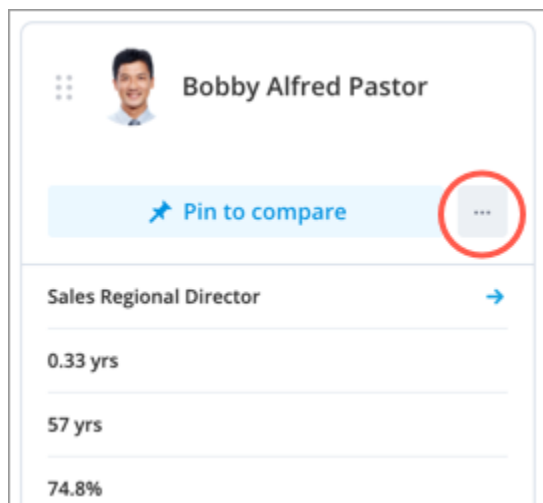
- The employee must be in the comparison grid.
  - The employee must be an active employee during the selected time period.
3. **Optional:** Narrow the scope population by clicking the **Create the population** button  in the **Drawn from** box. The scope population is the subset of members that will be considered when generating the similar group. For example, if you only want to find similar employees in the US, you can add a filter for Location Hierarchy: United States.

- Click **Add filter** in the **Narrow the population** panel.
  - In the **Filter** picker, select the attribute values that define the population.
  - When finished, click **Apply**.
  - Repeat steps a to c to add additional filters.
  - Click **Save changes**.
4. Click **Add** in the **Add similar group** panel.
- Result:** The model will take into account the attributes (important properties) selected in the studio experience, the member of interest, and your data access to find a similar group. If you get the **Too many members drawn from all members** error message, you must add filters to narrow the scope population.



Remove an employee or group from the comparison grid

In the column header, click the **More actions** button  and then click **Remove**.




Add or remove attributes

- Click the **Settings** button  on the **Visual Actions** menu.

Rearrange the comparison grid

- In the column header, click the **Move** icon , and drag the column to the desired position.

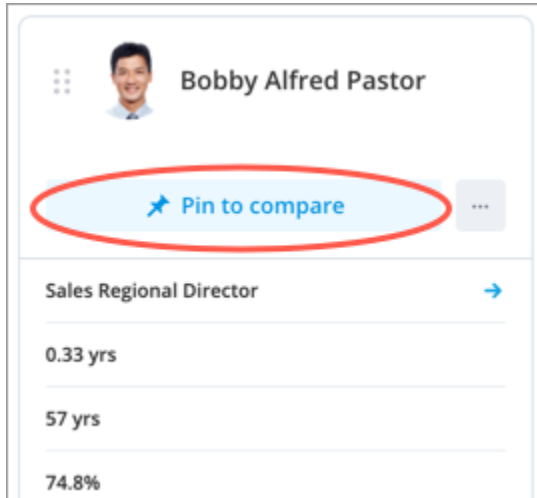
Reset the comparison grid

- To clear the comparison grid and start over, click the **Reset** button .

Calculate differences between attribute values

Pin a subject member to calculate the differences between other subject members and groups in the comparison grid. The subject member is used as the baseline for the comparisons. The difference from the group median is calculated for the subject member when comparing a subject member to a group.

- In the column header of the employee you want to use as the baseline for your comparison, click **Pin to compare**.



**Result:** Attribute values are replaced in the comparison grid. Calculated differences will appear for individual comparisons and Distribution visuals will appear for group comparisons.

**Tip:**

- Click the **Distribution** button  to expand the visual.
- Hover over the calculated values to find more information about the data point.

Capture the comparison grid

- Click the **Capture** button  on the **Visual Actions** menu.