

## Insperity® OrgPlus RealTime - Popular Formulas

### Formula Fields Overview

Insperity OrgPlus RealTime can be configured to add custom formula fields that work with your data to create powerful insight to your company's charts. The most common formula fields include headcount, which calculate based the number of employees in the chart, or salary totals, which calculates the sum of all the salaries within a determined range.

### Adding a Formula Field

To add a formula field, go to **Administration**, then to **Fields**. Select **Add Formula** then complete the new field properties. When finished, click **Save**.

### Popular Formula Fields

Below are a few of the most popular formula fields. These formulas are examples and your data source may differ in field availability and field names.

#### Formula Name: Headcount

Purpose: Calculates the number of direct and indirect reports for a manager.

Calculation:

- Type: Formula
- Categories: Lookup and Reference
- Functions: Count
- Entity: Person
- Range: Branch Exclusive

#### Formula Name: Span of Control

Purpose: Calculates the number of direct reports only for a manager.

Calculation:

- Categories: Choose the "Lookup and Reference"
- Functions: Count
- Range: Direct Subordinates Exclusive

#### Formula Name: Total Salary (of Direct Subordinates & Manager)

Purpose: Calculates the salaries of all the direct reports of a manager, including the salary of that manager.

Calculation:

- Field Type: Formula
- Categories: Number
- Functions: Total
- Field: Salary
- Range: Direct Subordinates Inclusive

**Formula Name: Average Salary (of direct subordinates)**

Purpose: This formula calculates the average salary of a manager's direct reports.

Calculation:

Field Type: Formula  
Categories: Number  
Functions: Average  
Fields: Salary  
Range: Direct Subordinates

**Formula Name: Average Age**

Purpose: Calculates the average age across a range of direct and indirect reports.

Calculation:

Field Type: Formula  
Category: Number  
Function: Average  
Field: Age  
Range: Direct Subordinates Exclusive

**Formula Name: Tenure**

Purpose: Calculates the amount of time for an employee in years from hire until "today".

Calculation: This calculation has multiple steps

Step 1: Tenure Days

Categories: Formula  
Functions: Date/Number of Days  
Field 1: Today  
Field 2: "hire date"  
Range: Self

Step 2: Tenure Years

Categories: Formula  
Functions: Number/Calculate  
Operand 1: Tenure Days  
Operand 2: Operator "/"  
Field: 365  
Range: Self

### Formula Group Name: Gender Diversity

Purpose: Calculates the percentage of males and percentage of females within a branch.

Calculation: This calculation has multiple steps

Step 1: Calculate headcount (see Headcount formula)

Step 2: Total Males

Field Type: Formula

Category: Count

Field: Gender = M

Step 3: Total Females

Field Type: Formula

Category: Count

Field: Gender = F

Step 4: % Males

Field Type: Formula

Total males / headcount

Step 5: % Females

Field Type: Formula

Total females / headcount

### Formula Group Name: Ethnicity Diversity

Purpose: Calculates the percentage of each ethnic category within a branch.

Calculation: This calculation has multiple steps. Follow the steps for Gender Diversity above, replacing Male or Female with the ethnic category.

Step 1: Calculate headcount (see Headcount formula)

Step 2: Calculate totals for each category as a separate step

Total Asian— formula, conditional count when Ethnicity field = Asian

Total Black— formula, conditional count when Ethnicity field = Black

Total White—formula, conditional count when Ethnicity field = White

Total Hispanic— formula, conditional count when Ethnicity field = Hispanic

Step 3: Calculate the percentage (count over headcount) for each category as a separate step

% Asian—formula, percent, Total Asian / headcount

% Black—formula, percent, Total Black / headcount

% White—formula, percent, Total White / headcount

% Hispanic—formula, percent, Total Hispanic / headcount