Creating a Turnover Report & Dashboard using Snapshot Reporting

Welcome to the Sage People guide on creating a Turnover Report and Dashboard using Snapshot Reporting. Understanding employee turnover is crucial for maintaining a healthy and productive workforce. This guide will walk you through the process of gathering and analyzing turnover data to create insightful reports and dashboards.

In this guide, we will focus on creating a Detailed Turnover Report. This report allows you to delve into the specifics of who has left the organization, capturing any key data you want to analyze.

For a broader overview, you may want to use this in conjunction with our High-Level Turnover Report, which you can find in our other guide: 'Creating a High-Level Turnover Report & Dashboard using Snapshot Reporting'.

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Business Context

Without this guide, there are two primary ways to access turnover data in Sage People:

- Turnover Tab
- Joined Report

The **Turnover Tab** provides a visual representation of trends over time but lacks flexibility in configuration. For example, it includes all users—such as contractors marked as "Data Only"—even if you prefer to exclude them from turnover statistics.

The **Joined Report**, on the other hand, offers greater customization, allowing you to filter data based on your specific needs. However, it doesn't provide the same trend analysis over time.

This guide introduces a turnover reporting method that combines the strengths of both approaches. It enables you to:

- Track turnover trends over time
- Apply custom filters to ensure the data is relevant to your organization

This is achieved using **Reporting Snapshots**, which capture point-in-time data based on a defined schedule (daily, weekly, or monthly). These snapshots allow for consistent, time-based reporting.

Limitations

This guide is designed to support global turnover reporting. While you can break down the data by country, division, department, or other relevant fields, please note the following:

- The objects created through this process **do not respect HR Department or HR Manager security settings**. As such, this method is best suited for **System Admins or HR Admins** with access to all data, rather than HR Managers with restricted access. That being said, if they don't have access to the turnover objects you create, they should still be able to see the overview data within a dashboard.

- **Reporting Snapshots are limited to 2,000 rows per run**. If your dataset exceeds this limit, any additional records will not be captured, and the system will notify you of the failure. To work around this limitation, consider splitting your data into multiple snapshots—such as one per country or region—to ensure complete data capture.

- **Snapshots only capture data from the first scheduled run date onward**. They do not include historical data by default. However, if needed, historical data can be manually loaded into the snapshot object to provide a more complete view.

Important Considerations

When creating an object for Snapshot Reports, it's important to note that the object operates independently and does not inherit HR Department Security settings. Consequently, any reports generated from this object may expose sensitive data unless access is carefully restricted. To mitigate this risk, ensure that only appropriate Profiles—such as Systems Admin and Fairsail Admin—have access. Avoid assigning access to roles like HR Manager, as this could inadvertently reveal data they are not authorized to view.

Whilst Systems Admins should get access automatically, you can follow the below instructions to grant access to any additional users.

Granting access to snapshot reporting via a Permission Set

1) As the Snapshot object, you created is not linked to HR Department level security, you must only grant access to users who are authorized to see the data in the Snapshot object. It is an all or nothing approach to the visibility of which employees appear in the subsequent reports that you will want to produce.

This can be done through selecting **Setup>Permission Sets**

   a) Select **New**
   b) Set a **label** and **description** for the permission set e.g 'Access to Detailed Turnover Snapshots' and leave the rest blank and click **Save.**
   c) Click into '**Object Settings'** and then find the relevant object e.g. 'Access to Detailed Turnover Snapshots'> click on the object name:
   d) Grant full access to the Turnover Snapshot object by checking the following six boxes: Read, Create, Edit, Delete, View All Records, Modify all Records, and **Save.**
      1. If users require full access to all snapshot data fields, you can simply check the 7th box labelled 'View All Fields' in the permissions settings.
      2. However, if you want certain users to access snapshot data but restrict visibility to specific fields, leave the 'View All Fields' box unchecked. Instead, adjust the field-level security within the Permission Set, which can be found on the same page as the object permissions.

If you'd like HR Managers to view turnover data **without granting access to the underlying objects**, you can create a **turnover dashboard** filtered by HR Department and assign access to the relevant HR Manager.

To ensure they can view the data:
   - The **dashboard must be filtered** to show only the relevant HR Department.
   - The **running user** of the dashboard should be set to **System Administrator**. This allows the HR Manager to view the data without needing direct object-level permissions.

> **i** **Note** while HR Managers will be able to view the dashboard, they won't have access to the underlying reports due to their lack of object-level permissions. The dashboard provides a high-level view only, without exposing the detailed report data behind it.

Creating Formula Fields at the Employment Record Level

To understand if an employee was part of the headcount in a period, you need to create a formula field on the Employment Record:

> **i** **Note** 0DP stands for zero decimal places. While this setting doesn't impact functionality, it helps maintain consistency and improves the overall neatness of the data presentation.

> **i** **Note** the fields referenced in these formulas are based on standard configurations. If your setup includes custom fields—such as non-standard leaver categories—be sure to adjust the formulas accordingly to reflect your specific field names and structures.

Field Label	Data Type	Formula	Description
Active Employment*	Formula (Number) – 0DP	*IF (fHCM2__Active__c = True, 1, 0)*	This tells you if the employment record is active. The aim is to disregard any previous, inactive employment records.

Creating your Source Report

Next, you need to create your base/source report using the standard report builder. This will need to contain any fields that you wish to report on relating to Turnover.

> **!** **Important** when creating snapshot reports, you may want to avoid capturing personal information, so you do not need to worry about deleting this out later for leavers for data protection purposes.

Report Type: Employment History with Team Member
Filters: All Employment History, All Time.

> **i** **Note** here you can add your own additional filters for those you do not want to include e.g. contractors, test users, Sage Support User. However, you should not filter out leavers.

Group Rows By: N/A

Columns:
- <u>Team Member: Unique ID</u>
- <u>Start Date</u>
- Basis
- Department
- Division
- Function
- Team
- Work Location
- <u>End Date</u>
- <u>Leaver Category</u>
- <u>Reason for Leaving</u>
- Team Member: Gender
- Team Member: Ethnicity
- <u>Active Employment</u>

> **i** **Note** here you can add which ever columns you wish to report on. The key fields are <u>underlined</u>.
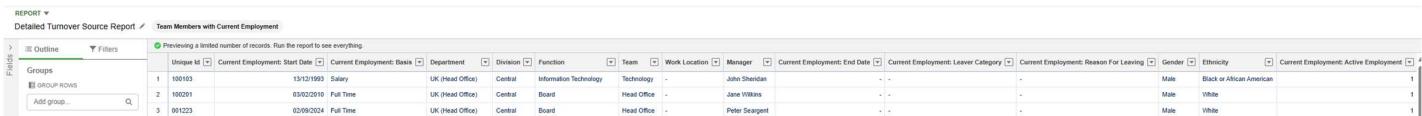
	Unique Id	Current Employment: Start Date	Current Employment: Basis	Department	Division	Function	Team	Work Location	Manager	Current Employment: End Date	Current Employment: Leaver Category	Current Employment: Reason For Leaving	Gender	Ethnicity	Current Employment: Active Employment
1	100103	13/12/1993	Salary	UK (Head Office)	Central	Information Technology	Technology	-	John Sheridan	- -		-	Male	Black or African American	1
2	100201	03/02/2010	Full Time	UK (Head Office)	Central	Board	Head Office	-	Jane Wilkins	- -		-	Male	White	1
3	001223	02/09/2024	Full Time	UK (Head Office)	Central	Board	Head Office	-	Peter Seargent	- -		-	Male	White	1

Creating an Object for your Detailed Turnover Snapshot Data

> **i** **Note** you could use the 'Reporting Snapshot' Object that already exists but we recommend keeping this data separate. We also recommend having a separate object for your High Level vs Detailed Turnover Data so you don't get the different fields confused.

This can be done through selecting **Setup> Object Manager> Create> New Custom Object**

Populate the following fields:

Object Name: The Name of the Object e.g. Detailed Turnover Snapshot
Plural: The plural form of the Object – e.g. Detailed Turnover Snapshots
Record Name: Keep this the same as the Object Name
Data Type: Text
Allow Reports: Checked

Please leave all other settings in this page as per the defaults & click save.

> **i** **Note** there is also a checkbox for 'Track Field History' – if you want to be able to track any changes made to the snapshot data, you may want to check this box.

> **!** **Important** this is the ONLY custom object customers are permitted to create.

Creating **Input Fields** for your Source Data on the Detailed Turnover Snapshot Object

Ensure any fields you want to capture into your Snapshot report exist as fields on the Detailed Turnover Snapshot Object.

> **i** **Note** these fields generally must be of the same data type as the source Object, except:
> - **Picklist and formula fields must be set as text fields.**
> - Lookup fields can be mapped to text fields. To map a field in the source report to a lookup field on the target object, map to the ID of the object associated with the lookup.
>
> **Example:** If wishing to store Employment Start Date, this is a Date field on the Employment object, so must also be a Date field on the custom Reporting Snapshot object.

Repeat this process for all fields you wish to store information on in your Reporting Snapshot.

Some fields we recommend you definitely include are:

Field Label	Data Type	Description
Run Date Time	Date/Time	This creates a field for which you can use to populate the date and time she snapshot ran (Execution Time). This field will be referenced in a later formula field (Run Date Adjusted)
Unique ID	Text	This creates a filed for which you can populate the Unique ID of the Team Member if you need to sense check your data.
Start Date	Date	This field is used in some of the formulas fields you will create on the Detailed Turnover Snapshot Object in the next step.
End Date	Date	This field is used in some of the formulas fields you will create on the Detailed Turnover Snapshot Object in the next step.
Active Employment	Number	This field is used in some of the formulas fields you will create on the Detailed Turnover Snapshot Object in the next step.
Leaver Category	Text	This field is used in some of the formulas fields you will create on the Detailed Turnover Snapshot Object in the next step.
Reason for Leaving	Text	This will give you a more detailed view on why the team member as left.
Division	Text	You may want something to group your data by, whether that be Division, Country or something else.

Creating Formula Fields **on the Detailed Turnover Snapshot Object**

> **!** **Important** there is an assumption with these formulas that the snapshot is being run on the **first day of the month**. These formulas may need adjusting depending on when you run the snapshot.

*DP= Decimal Places

Field Label	Data Type	Formula	Description
Run Date – Adjusted	Formula (Date)	*DATEVALUE(Run_Date_Time__c) – 1*	This formula is only necessary if you're running the snapshot on the first day of the month. For example, if you run the report on 1st August, you're actually retrieving data for the period 1st July to 31st July. The Run Date Adjusted formula looks at the snapshot's run date and subtracts one day, ensuring the adjusted date reflects July—the actual period the data refers to—rather than August, when the report was run.
Start Period	Formula (Date)	*DATE(YEAR(Run_Date_Adjusted__c),MONTH(Run_Date_Adjusted__c),01)*	These formulas give you the Start and End Periods for which the turnover applies. E.g. if the Snapshot is running on 1 July 2023, the start period would return 1 June 2023 and the end period would return 30 June 2023.
End Period	Formula (Date)	*DATE(YEAR(Run_Date_Adjusted__c),MONTH(Run_Date_Adjusted__c),DAY(Run_Date_Adjusted__c))*	
Headcount Start	Formula (Number) – 0DP	*IF(Start_Date__c < Start_Period__c && (ISBLANK(End_Date__c) && Active_Employment__c =1 || End_Date__c > Start_Period__c) && Active_Employment__c =1 , 1,0)*	This tells you if the employee contributed to the headcount at the start of the period e.g. 1 June. It references the Active Employment formula on the employment object.
Headcount End	Formula (Number) – 0DP	*IF(Start_Date__c <= End_Period__c && (ISBLANK(End_Date__c) && Active_Employment__c =1 || End_Date__c > End_Period__c) && Active_Employment__c =1 , 1, 0)*	This tells you if the employee contributed to the headcount at the end of the period e.g. 30 June. It references the Active Employment formula on the employment object.

Headcount Starter	Formula (Number) – 0DP	IF(Start_Date__c >= Start_Period__c && Start_Date__c <= End_Period__c && (ISBLANK(End_Date__c) && Active_Employment__c =1 // End_Date__c >= End_Period__c && Active_Employment__c =1), 1, 0)	This tells you if the employee was a new starter in the period (e.g. between 1 – 30 June)
Headcount Leaver	Formula (Number) – 0DP	IF(End_Date__c >= Start_Period__c && Active_Employment__c =1 && End_Date__c <= End_Period__c , 1, 0)	This tells you if the employee was a Leaver in the period (e.g. between 1 – 30 June)
Headcount Leaver Involuntary	Formula (Number) – 0DP	IF(End_Date__c >= Start_Period__c && Active_Employment__c =1 && End_Date__c <= End_Period__c && Leaver_Category__c ="Involuntary" , 1, 0)	This tells you if the employee was an Involuntary Leaver in the period (e.g. between 1 – 30 June)
Headcount Leaver Voluntary	Formula (Number) – 0DP	IF(End_Date__c >= Start_Period__c && Active_Employment__c =1 && End_Date__c <= End_Period__c && Leaver_Category__c ="Voluntary" , 1, 0)	This tells you if the employee was an Voluntary Leaver in the period (e.g. between 1 – 30 June)

Creating & Scheduling the Snapshot Report

The next step is to create the snapshot report.

This can be done through **Setup> Reporting Snapshots**

Click on '**New Reporting Snapshot'** and complete the fields as follows:

Reporting Snapshot Name: Detailed Turnover Snapshot
Running User: Sage People System Support
Source Report: Select the Detailed Source Report you created earlier
Target Object: Select the Detailed Turnover Snapshot Object

Click '**Save & Edit Field Mappings**'.

The next step is to complete the mapping from the report you created to the fields you added to the Turnover Snapshot Object.

An example of how this looks is below. When you are finished, press Save.

| Fields from Source Report | Map to | Fields in Target Object |
Detailed Turnover Source Report		Detailed Turnover Snapshot
Active Employment	➡	Active Employment (Number(18, 0))
Basis	➡	Basis (Text(255))
(No fields with compatible data type)	➡	Clone Source (Lookup())
Department	➡	Department (Text(255))
Reporting Snapshot Name	➡	Detailed Turnover Snapshot Name (Text(80))
Division Name	➡	Division (Text(255))
Team Member: Empl ID	➡	Empl ID (Text(64))
End Date	➡	End Date (Date)
Team Member: Ethnicity	➡	Ethnicity (Text(255))
Function Name	➡	Function Name (Text(255))
Team Member: Gender	➡	Gender (Text(255))
Leaver Category	➡	Leaver Category (Text(255))
(No fields with compatible data type)	➡	Manager (Lookup(Management))
(No fields with compatible data type)	➡	Object Access Level (Lookup(User Record Access))
(No fields with compatible data type)	➡	Owner (Lookup(User,Group))
Leaver Category	➡	Reason for Leaving (Text(255))
(No fields with compatible data type)	➡	Record Visibility (Lookup(Record Visibility))
Execution Time	➡	Run Date Time (Date/Time)
Start Date	➡	Start Date (Date)
Team Name	➡	Team Name (Text(255))
(No fields with compatible data type)	➡	Work Location (Lookup(Work Location))

> **i** **Note** if you are using an existing object OR using the same object for both the High Level and Detail report, you should ensure you capture the Reporting Snapshot Name. You can then use this to filter your data in the output report.

The Report Snapshot Summary will then show only the fields mapped:

Field Mappings   [Edit]   Columns in Source Report: 15   Fields in Target Object: 21

| Source Report Column	Target Object Field
Active Employment	Active Employment (Number(18, 0))
Basis	Basis (Text(255))
Department	Department (Text(255))
Reporting Snapshot Name	Detailed Turnover Snapshot Name (Text(80))
Division Name	Division (Text(255))
Team Member: Empl ID	Empl ID (Text(64))
End Date	End Date (Date)
Team Member: Ethnicity	Ethnicity (Text(255))
Function Name	Function Name (Text(255))
Team Member: Gender	Gender (Text(255))
Leaver Category	Leaver Category (Text(255))
Leaver Category	Reason for Leaving (Text(255))
Execution Time	Run Date Time (Date/Time)
Start Date	Start Date (Date)
Team Name	Team Name (Text(255))

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Next, you need to **Schedule Reporting Snapshot.**

In effect this is essentially the source report you created, automatically running, and populating the Turnover Snapshot Object, with the mappings you entered.

Next to **Schedule Reporting Snapshot** click **Edit**

Then simply setup the desired schedule (remember these formulas are based on the report running on the 1st of the month) and click **Save**.
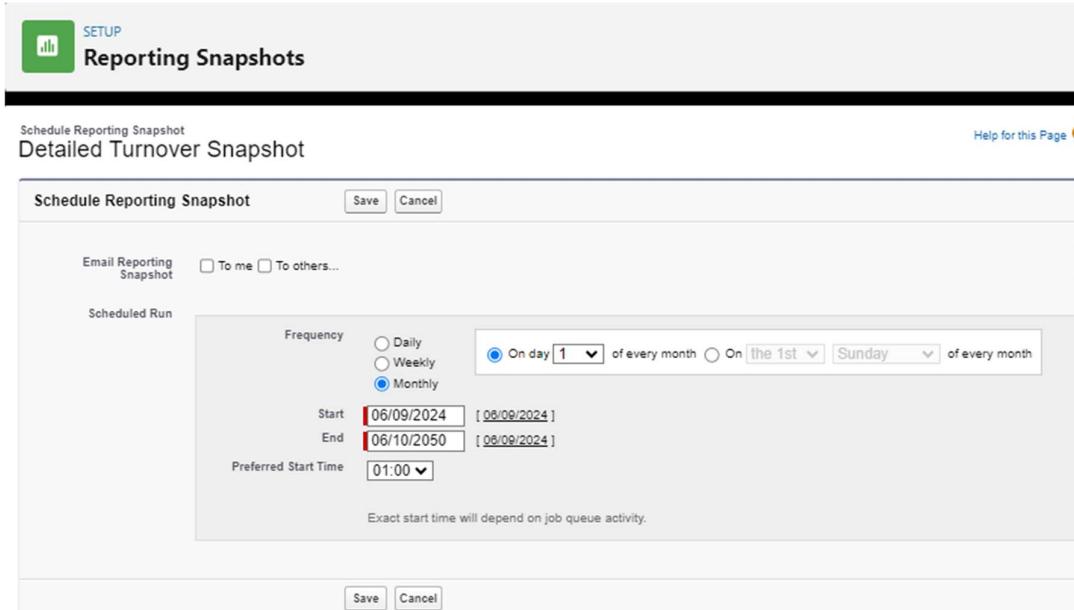
The setup of your snapshot is now complete, and after it has run for the first time, you will be able to run reports on it.

Creating your Output Report Type

> **i** **Note** this step may not be necessary. After creating the object, check whether the report type "Detailed Turnover Snapshots" is available. If it is, you can skip this section. If not, please proceed with the steps outlined below.

The next step is to create a **Report Type** on which to base your new report.

This can be done through selecting **Setup>Report Types**

1. Select **New Custom Report Type**
2. Select Primary Object as the Object you created e.g. Detailed Turnover Snapshots
3. Set the Report Type Label as "Detailed Turnover Snapshots"
4. Add a description.
5. Store in "Administrative Reports"
6. Select Deployed
7. Then select **Next**
8. Click through the next page, and **Save**
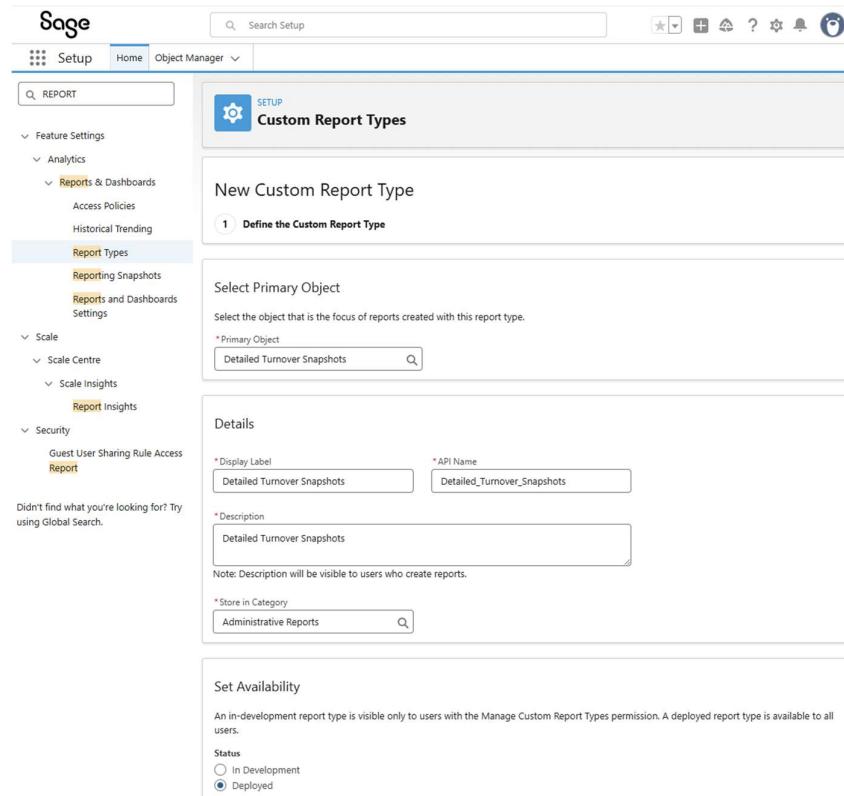
Creating your Output Report

Total Turnover

The final step is to create your new Snapshot Output Report, which you can create in the same way as creating any normal report.

Navigate to **Reports** menu
Select **New Report**
Search for and select the Report Type: Detailed Turnover Snapshot
Select **Start Report**

Filters: All Detailed Turnover Snapshots, All Time, Run Date= LAST 365 DAYS (or whichever period you would like to review the turnover data for).
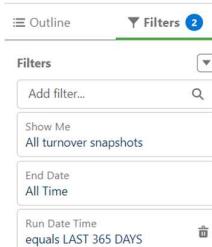

Group Rows By: Run Date – Adjusted

> **i** **Note** this will display as the actual run date by default e.g. 01/01/2025. However, if you click on the small arrow icon on the column 'Run Date – Adjusted', you can then choose to 'Group Date By…' and choose 'Calendar Month':
>
>
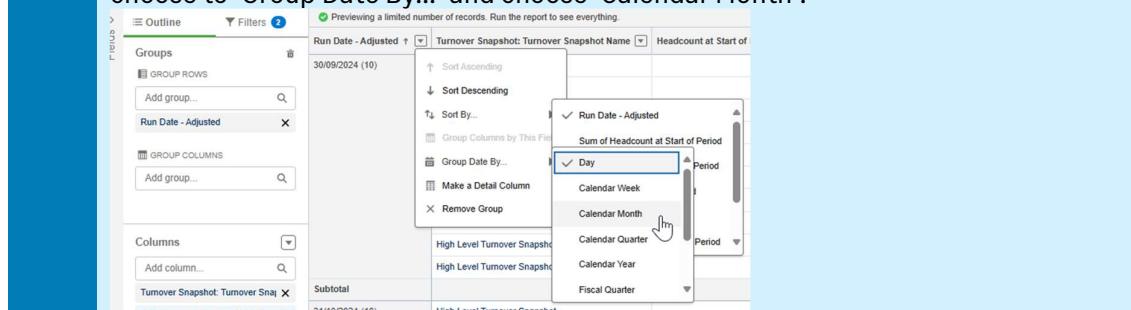
Columns:

- Unique ID
- Start Date
- End Date
- Headcount Start
- Headcount End
- Headcount Leaver
- Headcount Starter
- Headcount Leaver Voluntary
- Headcount Leaver Involuntary
- Active Employment
- Division Name
- Location
- Reason for Leaving
- Leaver Category

You then need to add the following Summary Formulas:
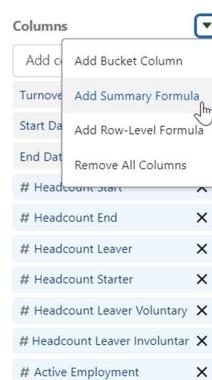
> **!** **Important:** There is an assumption with these formulas that they are calculating Turnover based on a rolling 12-month period. If you want to use a different period, you will need to amend the formulas to get meaningful figures — e.g., where the report formulas divide by 12 months, try dividing by 4 months if looking at a particular Quarter.
>
> If you are just starting to capture data and have not imported historical information (e.g., only one month of data is available), the turnover figure will initially be incorrect due to the divide-by-12 assumption. In such cases, you may want to temporarily adjust the formula to reflect the actual number of months available. For example:
>
> - After 1 month, remove the divide-by-12 entirely.
> - After 2 months, divide by 2 and then multiply by 12.
> - After 3 months, divide by 3 and multiply by 12.
>
> Continue adjusting until a full 12-month dataset is available, at which point the original formula becomes meaningful.

> **i** **Note** you want to apply all of the below formulas as 'Grand Total Only':

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Formula Label	Formula Output Type	Formula	Description
Average Headcount – Total	Number – 2DP	((PARENTGROUPVAL(Detailed_Turnover_Snapshot__c.Headcount_End__c:SUM, GRAND_SUMMARY)+PARENTGROUPVAL(Detailed_Turnover_Snapshot__c.Headcount_Start__c:SUM, GRAND_SUMMARY))/2)/12	This tells you the average headcount over the period in which your report is filtered (e.g over the last 365 days)
Turnover – Total	Percent – 2DP	(PARENTGROUPVAL(Detailed_Turnover_Snapshot__c.Headcount_Leaver__c:SUM, GRAND_SUMMARY))/(((Detailed_Turnover_Snapshot__c.Headcount_End__c:SUM+Detailed_Turnover_Snapshot__c.Headcount_Start__c:SUM)/2)/12)	This tells you the Total Turnover over the period in which your report is filtered (e.g over the last 365 days)
Turnover – Involuntary	Percent – 2DP	(PARENTGROUPVAL(Detailed_Turnover_Snapshot__c.Headcount_Leaver_Involuntary__c:SUM, GRAND_SUMMARY))/(((Detailed_Turnover_Snapshot__c.Headcount_End__c:SUM+Detailed_Turnover_Snapshot__c.Headcount_Start__c:SUM)/2)/12)	This tells you the Total Involuntary Turnover over the period in which your report is filtered (e.g over the last 365 days)
Turnover – Voluntary	Percent – 2DP	(PARENTGROUPVAL(Detailed_Turnover_Snapshot__c.Headcount_Leaver_Voluntary__c:SUM, GRAND_SUMMARY))/(((Detailed_Turnover_Snapshot__c.Headcount_End__c:SUM+Detailed_Turnover_Snapshot__c.Headcount_Start__c:SUM)/2)/12)	This tells you the Total Voluntary Turnover over the period in which your report is filtered (e.g over the last 365 days)

Turnover by Month

If you want to view the turnover rate by month, instead of overall, you can do a 'Save As' on this report and call it: **Headcount by Month (Detailed Output).**

	Total Headcount Start	Total Headcount End	Total Headcount Leaver	Total Headcount Starter	Total Headcount Leaver Voluntary	Total Headcount Leaver Involuntary	Total Active			
rds	166	171	1	5		0	262			

Run Date - Adjusted ↑ ▼	dcount Start	Sum of Headcount End	Sum of Headcount Leaver	Sum of Headcount Starter	Sum of Headcount Leaver Voluntary	Sum of Headcount Leaver Involuntary	Sum of Active	Record Count	ƒx Turnover - Month ▼	ƒx Average headcount - Month
September 2023	13	13	0	0	0	0	20	23	0.00%	13.00
October 2023	13	13	0	0	0	0	20	23	0.00%	13.00
November 2023	15	15	0	0	0	0	22	25	0.00%	15.00
December 2023	16	16	0	0	0	0	23	26	0.00%	16.00
January 2024	15	15	0	0	0	0	22	25	0.00%	15.00
February 2024	14	16	1	2	1	0	24	27	6.67%	15.00
March 2024	13	16	0	3	0	0	24	27	0.00%	14.50
April 2024	13	13	0	0	0	0	21	24	0.00%	13.00
May 2024	13	13	0	0	0	0	21	24	0.00%	13.00
June 2024	13	13	0	0	0	0	21	24	0.00%	13.00
July 2024	14	14	0	0	0	0	22	25	0.00%	14.00
August 2024	14	14	0	0	0	0	22	25	0.00%	14.00
Total	166	171	1	5	1	0	262	298		

You can then delete the formulas and replace them with the following Summary Formulas – this time, make sure you apply the formula as **'Selected Groups'**:

Formula Label	Formula Output Type	Formula	Description
Turnover – Month	Percent – 2DP	(Detailed_Turnover_Snapshot__c.Headcount_Leaver__c: SUM/((Detailed_Turnover_Snapshot__c.Headcount_End__c:SUM+Detailed_Turnover_Snapshot__c.Headcount_Start__c:SUM)/2))	This tells you the turnover of each month e.g. for June 2023 vs July 2023.
Average Headcount – Month	Number – 2DP	(Detailed_Turnover_Snapshot__c.Headcount_Start__c:SUM+Detailed_Turnover_Snapshot__c.Headcount_End__c:SUM)/2	This tells you the average headcount for each month e.g. for June 2023 vs July 2023.
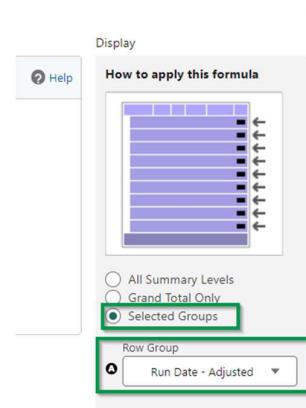
# Creating a Turnover Dashboard
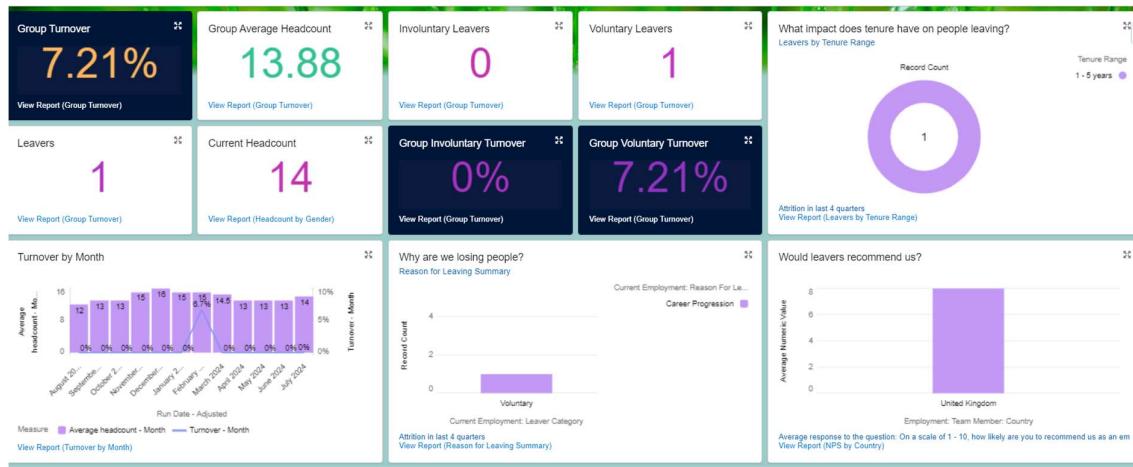
Once you have created your Turnover Snapshots and started to gather data, you can then build this into a dashboard as shown above.

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