Increased Efficiency Utilizing Saved Objects in Financial Reporting

All developers understand the power of using objects during development activities, a concept that can be leveraged in the development of Oracle/Hyperion Financial Reports. Utilizing saved objects allows the development team to deliver a product in less time and provides the ability to quickly react to future report modifications. The information below (1) provides common saved object examples and (2) displays how saved objects are created and used.

What type of report information should be converted into saved objects?

The goal behind utilizing saved objects is to avoid the recreation of code, thus I find it valuable to turn all report header and footer information into saved objects. Items such as company logo's, report title/sub-tile information, dimensional point-of-view selections, date & time stamps, page numbers and data source information make for great saved objects as they typically reside on all financial or management reports.
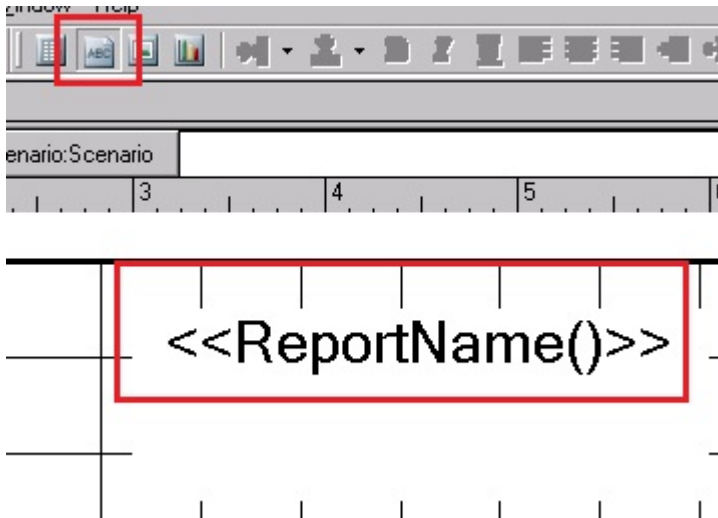
The usefulness of report objects may seem less important during the early stages of development, but as your reporting repository grows, their impact becomes increasingly important. For example, changing a company logo on a few reports is a minor incontinence, but making that same change to 50 reports could take hours to complete, resulting in the inefficient use of development/ maintenance time.

How are saved objects created and used?

Creating saved objects is a simple process that requires one additional step after the initial creation of your object. The
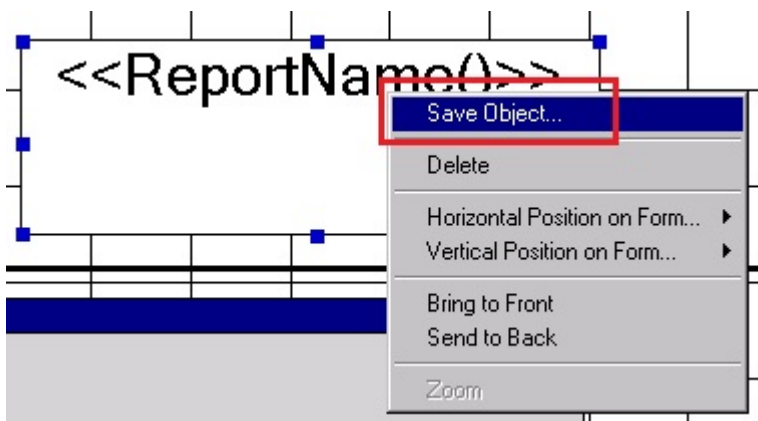
example below walks through the process of creating a report title saved object. The same process will be used in the creation of all reporting saved objects.
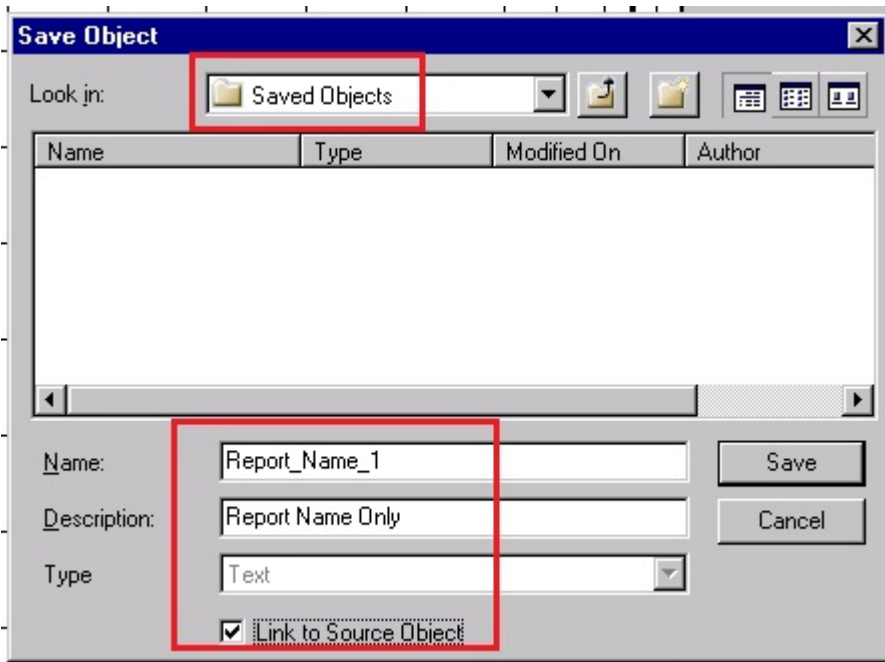
<u>Step 1 — Create your Object:</u>

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Step 2 — Save the Object:

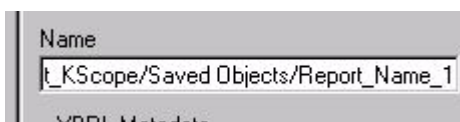Right-click the object and select Save Object…

Best practice involves the creation of a Saved Object folder in the report repository where all saved objects will reside. Notice the use of this folder below.

IMPORTANT — Be sure to place a checkmark next to "Link to Source Object". This link enables future modifications of this object to resonate across all reports where this object exists. This checkbox allows for the increased efficiency when developing and maintaining reports.
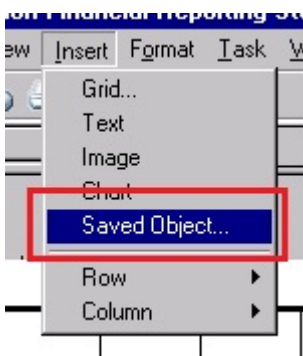
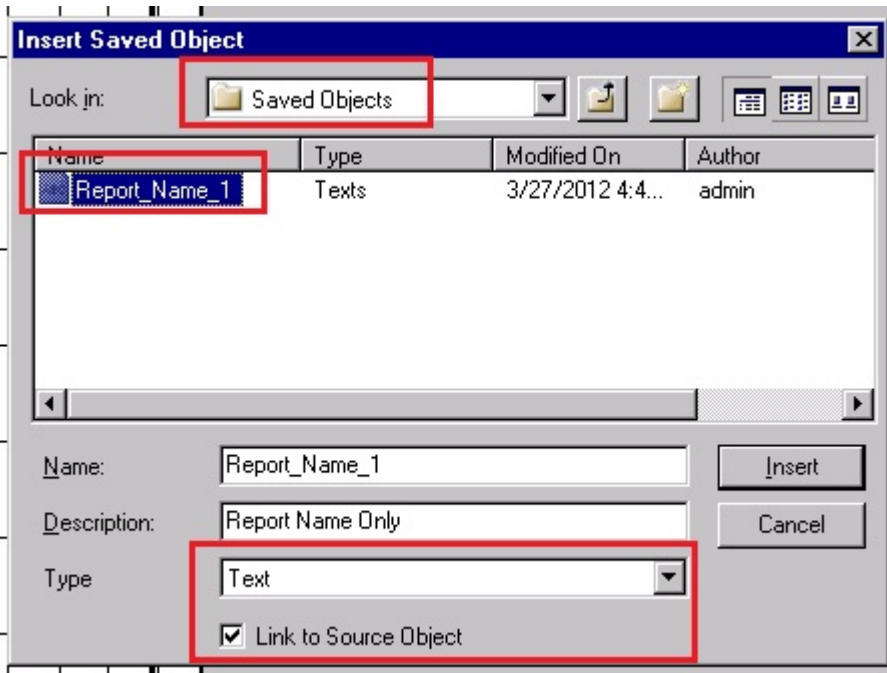Once the report has been saved, notice the object name changes.
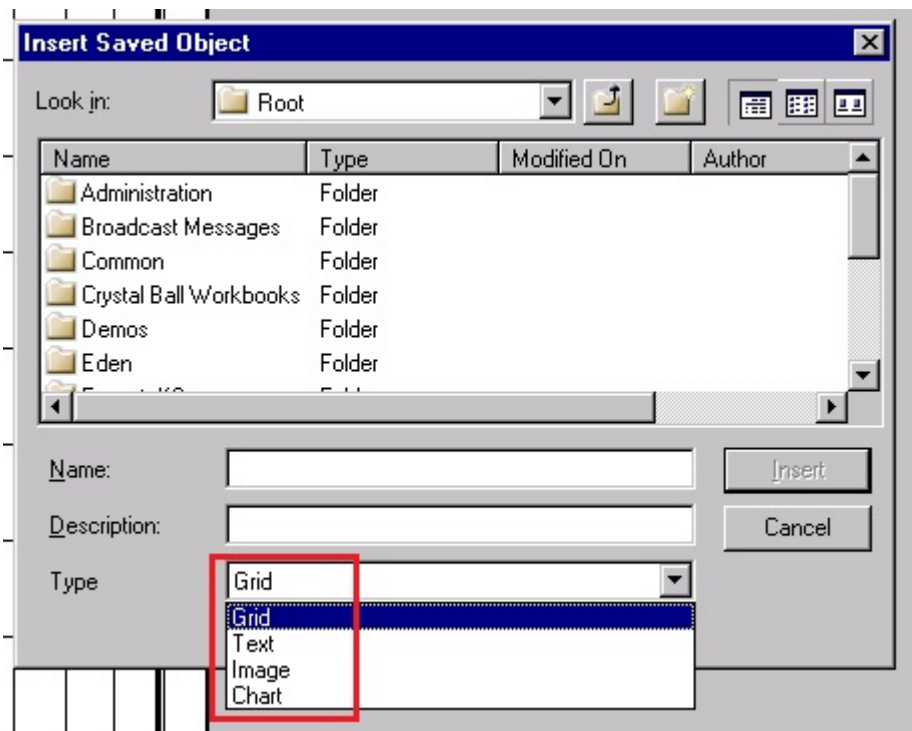

Step 3 – Use your Saved Object:

Once the object has been saved you can reference it in future report development via the link. Create a new report and insert the saved object.

Be sure to select the Type of "Text" (It will always default to Grid) and place a checkmark next to "Link to Source Object".

FYI: When inserting saved objects you have 4 choices (Grid, Text, Image and Chart). Be sure to select the correct type in order to locate the desired saved object.

Note that when saved objects are inserted, they are placed in the body of the report by default; the developer will need to place the saved object in the correct position on the report.

<<ReportName()>>