



Effective Data Management in MIP: Import and Export Strategies



MAY 5-7, 2025

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Dennis Guiney



- Senior Technical Specialist at JMT
- Charged with installing, upgrading, and supporting JMT's product line
- Works with clients for integration of all third-party products, custom programming, and daily operational support



Session Objectives

- Eliminate duplicate data entry, Streamline operations, Integrate systems
- Reduce Errors
- Break down silos, Create cohesive company view

Design Questions

- Do we need standalone reporting (all data in Momentive MIP)
- What is key data needed for reports and what are the lookup/search options desired
- Do we need subledger synchronization (Vendors, AP, Customers, AR)
- What are the sequential steps to replace parallel methods
- Maintain any reconciliation process already in place



Building Blocks

- Reporting Needs
- Data and Work Flow / Integration Mapping
- Def Files or Rest Based API
- Documentation

Reporting Needs

- Is data source to act as a reportable subledger (do we only need summary information, do we want enough detail to link back to individual dates/records, do we want all information in Momentive MIP.)
- Review reports in subledger for Momentive by accounting – do codes/names match, is there enough detail



Reporting Needs

- Any UDFs needed (statistical, index, search needs)
- Verify final reports (Budgeted Revenue and Expense, General Ledger Detail or Posted Transaction Reports, Budget Analysis including Statistical)

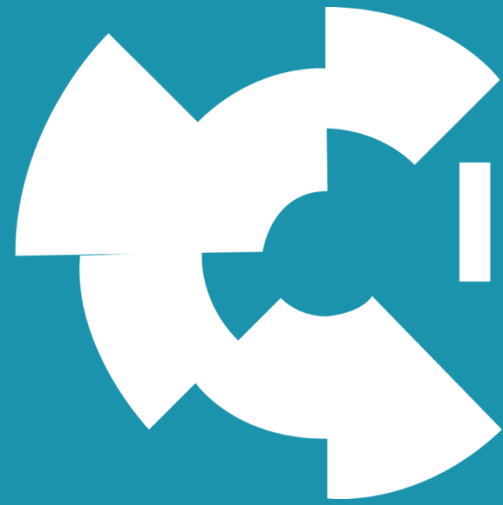
Data / Work Flow

- If done manually, review current entry compared to source data
- Is mapping table required to translate source data for MIP, can we use a simple list vs lookup
- Any fields missing that are needed for MIP
- If source data is amended after export, can we tell / how do we update MIP
- If we void/amend data in MIP after import, can we tell / how do we update source



Live Demonstrations





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