

WASHINGTON, D.C., MAY 4-6, 2026

# INNOVATE

JMT Consulting

Connecting the Dots: Maximizing  
with Effective Third-Party Solutions  
with Imports & Integrations

Dennis Guiney

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# Introduction



## Dennis Guiney

Client Account Manager

20 + years working at JMT,  
implementing and supporting Fund  
Accounting solutions.

# Session Objectives

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

## Design Questions

- Do we need standalone reporting (all data in Momentive MIP)
- What is the 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 the 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 the subledger for MIP 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

- For manual imports, review the current entry compared to the source data
- Is a mapping table required to translate source data for MIP? Can we use a simple list vs. a 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 the source

# Live Demonstration



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