Loading External Budgets into JDE – The Key is the Z (File)!

Sarah Mills

8/22/19

Agenda

- Introduction
- Overview of Budgeting in JDE
- Preparation – JDE
- Preparation – Import Data/Sheet
- Import/Batch Processor/Spread
- Using JSI to Review Budgets
- Tips and Questions

[Slide Title]

- First Level
  - Second level
    - Third level
      - Fourth level
        - Fifth level

- First Level
  - Second level
    - Third level
      - Fourth level
        - Fifth level

Your Presenter

Sarah Mills

Senior Director, JDE Managed Services

Oracle JD Edwards EnterpriseOne 9.0 Financial Management Certified Implementation Specialist

- Over 14 years of JD Edwards experience
  - Human Capital Management
  - Financials: AR, AP, GL, FA
  - Distribution: Sales, Inventory, Procurement
  - Capital Asset Management
  - Security and Training

- Active Quest User Group participant
  - Past President, HCM SIG
  - Former Board Member, KCRUG
  - Implementation Team, Training SIG

Budgeting in JDE – "REAL" Budgeting

- Uses one or more of the budget cycles:
  - Requested
  - Approved
  - Final

- Second level
  - Third level
    - Fourth level
      - Fifth level

What *Most* People Actually Use – Z File Import

- First Level
  - Second level
    - Third level
      - Fourth level
        - Fifth level

Preparation: JDE Setup

- First Level
  - Second level
    - Third level
      - Fourth level
        - Fifth level

Preparation: Data Sheet/Grid Format

- First Level
  - Second level
    - Third level
      - Fourth level
        - Fifth level

Importing Data

- First Level
  - Second level
    - Third level
      - Fourth level
        - Fifth level

Batch Processor

- First Level
  - Second level
    - Third level
      - Fourth level
        - Fifth level

Spreading

- First Level
  - Second level
    - Third level
      - Fourth level
        - Fifth level

Using Job Status Inquiry to Review

- First Level
  - Second level
    - Third level
      - Fourth level
        - Fifth level

Tips/Questions

- First Level
  - Second level
    - Third level
      - Fourth level
        - Fifth level

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Contact Info:

smills@syntax.com

Tel: 314.954.4357

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