IEEE NextGen
Enriching your experience

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NextGen Program Goal

Creating processes and tools that **streamline, simplify, save time, and allow for greater financial and contract visibility** to improve business insights, workflow, and decisions.

- An investment in improved efficiencies

- Less time spent on administrative responsibilities

We are HERE

✓ We are on a journey, working towards a better financial future for IEEE.

✓ Change is an opportunity and will take time however in collaboration with our volunteers we are committed to help achieve these goals.

✓ Your input and participation will make this successful.

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Future View

CONTROL information with greater visibility

QUICKLY make the right decisions

ENHANCE collaboration

ELIMINATE confusion

EXPERIENCE greater efficiencies

NextGen Contracts

NextGen Contracts will provide greater efficiencies, EASE OF USAGE, communications and process STANDARDIZATION in addition to GREATER VISIBILITY into your contract tracking process.

Key Benefits

+ **SINGLE SYSTEM** with a dashboard to view your contract progress, communications

+ **CENTRALIZED** repository for contracts at your fingertips

+ **IMPROVED** contract turnaround; high-quality, easy to use templates

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NextGen Banking

A **STREAMLINED** approach that provides a **ONE STOP** resource for your global banking needs with integrated **SELF-SERVICE** options providing **GREATER FLEXIBILITIES** and ease of use.

Phased-in global approach & replaces Concentration Banking

Key Benefits

+ **SELF-SERVICE ability** for writing checks, ACH or wire transfers

+ **MOBILE APPLICATION**

+ **REAL TIME** transactions

+ **ONE STOP** for all banking needs

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NextGen Expense Reimbursement

A platform that provides an efficient expense reporting process. This **CLOUD-BASED** expense reimbursement platform is designed to create an **AUTOMATED**, **EFFICIENT** and **FAST** reimbursement experience.

Previously called: Concur Expense

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Key Benefits

+ **ROBUST** cloud platform

+ **ELECTRONIC PAYMENT** processing

+ **LIFE CYCLE VIEW** of your expense report from submission to payment in real time

+ **CREATE, SUBMIT & APPROVE** expense reports anytime/anywhere with the mobile app
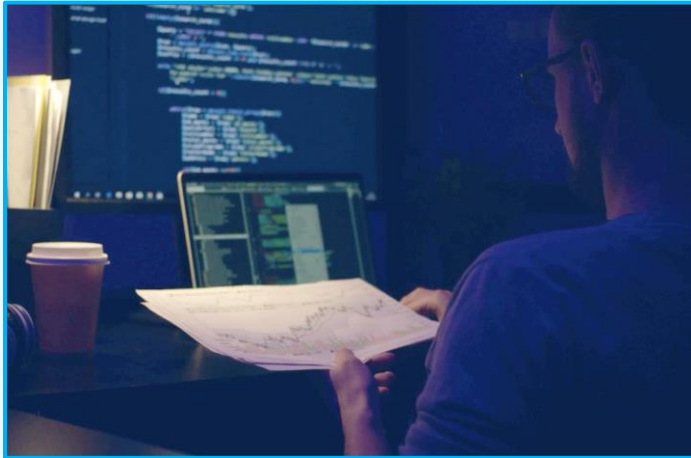
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NextGen Financials Cloud

This integrated platform provides a **ONE STOP** financial resource for our volunteers, providing **AGILITY**, **TRANSPARENCY** and **GREATER BUSINESS INSIGHTS** for decision making.

NetSuite retiring end of April -- more details to come

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Key Benefits

+ **INTEGRATED SYSTEM; ONE SOURCE**

+ **SELF-SERVICE REPORTING** to move forward quickly with decisions

+ **FINANCIAL DRILL-DOWN VIEW and** robust cloud based reporting

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USER EXPERIENCE

	TA Society (Treasurers)	MGA Geo Unit (Treasurers)	Conference (Treasurers)	Standards (Treasurers)	Staff Support or User
NextGen Financials Cloud	✔	✔	✔	✔	✔
NextGen Contracts	✔	✔	✔	✔	✔
NextGen Banking	*	✔	✔	✔	✔
NextGen Expense Reimbursement	✔	✔	✔	✔	✔

- Note: 90% of users are Treasurers within each area
  * Societies don't use Next Gen banking but will be able to view conference balances

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Key Requirements and Personas

Requirement	GeoUnits	Society	Standards	Conference
Simple, user-friendly landing page, Single sign-on access, FAQs	✓	✓	✓	✓
Make Payments & Transfer Money	✓	✓	✓	Make payments
Forecasting and Budgets	✓	✓	✓	✓
Upload External Costs & Revenue, Review & Update Accounting, 1099 /1042 forms	✓		✓	✓
Upload Receipt, Start New Expense Report, See All Expense Reports, Approve Expenses	✓	✓	All but approve	✓
Search and View Suppliers		✓		✓
Operations Forecasting and Budgets		✓		
Financial Reports appropriate to role	✓	✓	✓	✓
My Contracts	✓	✓		✓
Training	✓	✓	✓	✓
MyProject			✓	

Welcome to NextGen Kelli!

Welcome to your NextGen experience. Here, you can access your treasury related tasks and reports and stay up to date with the latest training.

My Top Activities

All your most common tasks at the touch of a button.

All   Financial   Expenses   Contracts

Make Payments

Approve Expense Reports

Upload Expense Receipts

Start New Expense Report

See All Expense Reports

Forecasting

Create & Manage Budgets

Upload Conference Costs & Revenue

Review & Update Accounting

Search & View Suppliers

Show More Top Activities

Training

How-to's for all your NextGen Activities.

Kelli Parikh
Conference Organizer

Total New Alerts   8

🔔 **Note to Self**
Forecasting should be completed this week...

🔔 **Note to Self**
Don't forget to review accounting for recent transactions...

📄 **Note to Self**
Don't forget to pay bills coming in from the vendor on Tuesday...

See All Alerts

Financial Reports

Run your detailed financial reports.

Budget vs. Actuals vs. Forecasts
⊗ Run Report

Profit & Loss Consolidated Income
⊗ Run Report

Bank Statements

We are HERE

✓ We are on a journey, working towards creating better financial and contract systems.

✓ This will be a transition over the next several months with various systems retiring such as NetSuite and Concentration Banking.

✓ Training and details will be forthcoming.

✓ Thank you to those volunteers who are assisting us through this transition.

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Thank you