



NextGen Finance Status

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NEW in 2021







“One place for data consistency for IEEE”

*Joe Lillie
2020 IEEE Treasurer*

IEEE Proprietary

NEW Tools for Treasurers by NextGen



	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

Other components of the system of systems

Contract Benefits

- + Single system with a dashboard to view your contract progress, communications, plus more vs. emails/voicemails/etc.
- + Centralized repository for contracts at your fingertips
- + Improved contract turnaround; high-quality, easy to use templates
 - Easy access to alternative clauses
 - Access to institutional knowledge
 - Clear, concise communications
 - Efficient workflow and speedier processes

Expense Reimbursement Benefits

- + Robust cloud platform
- + Electronic payment processing
- + Ability to see the life cycle of your expense report from submission to payment in real time
- + Create, submit, & approve expense reports anytime/anywhere with the mobile app
 - Integration with Oracle Cloud Financials
 - Ability to leverage IEEE's buying power

Banking Benefits

- + Self-service ability for writing checks, ACH or wire transfers
- + Mobile application
- + Real time transactions
- + Streamlined processes/applications
- + One stop for all banking needs

Treasurer Tools tailored to role

NextGen
At your fingertips

Balance your checkbook

Quick access to reports

Access to resources & training

Get help

NextGen Performance Dashboard

Manage My NextGen Finances

My notifications >>>
1 expense report pending approval
2 payments to be made

Sample tooltip with instructions to appear here on hover to direct the user on next steps and define terms

BALANCES

ACCOUNT	NATIVE	US\$
Account 1	Xnnn.n	\$Xnnn.n
Account 2	Xnnn.n	\$Xnnn.n
Account 3	Xnnn.n	\$Xnnn.n
TOTAL	Xnnn.n	\$Xnnn.n

YTD

	NATIVE	US\$
Revenue	Xnnn.n	\$Xnnn.n
Expense	Xnnn.n	\$Xnnn.n
NET	Xnnn.n	\$Xnnn.n

Performance against Budget

+ Income 2000

Expense 1500

Profitability >>>

Top Expenditures >>>

Account Summary >>>

Account Balances >>>

Financial Alerts >>>
Relevant alert 1 with link for more info
Relevant alert 2 with link for more info

View all Financial Reports >>>

Access training | Contact & Support

IEEE NextGen

4 November 2020

Future View



**Quickly make
the right
decisions**



**Control
business
strategy**



**Predict
long-term
growth**



**Enhance
collaboration**

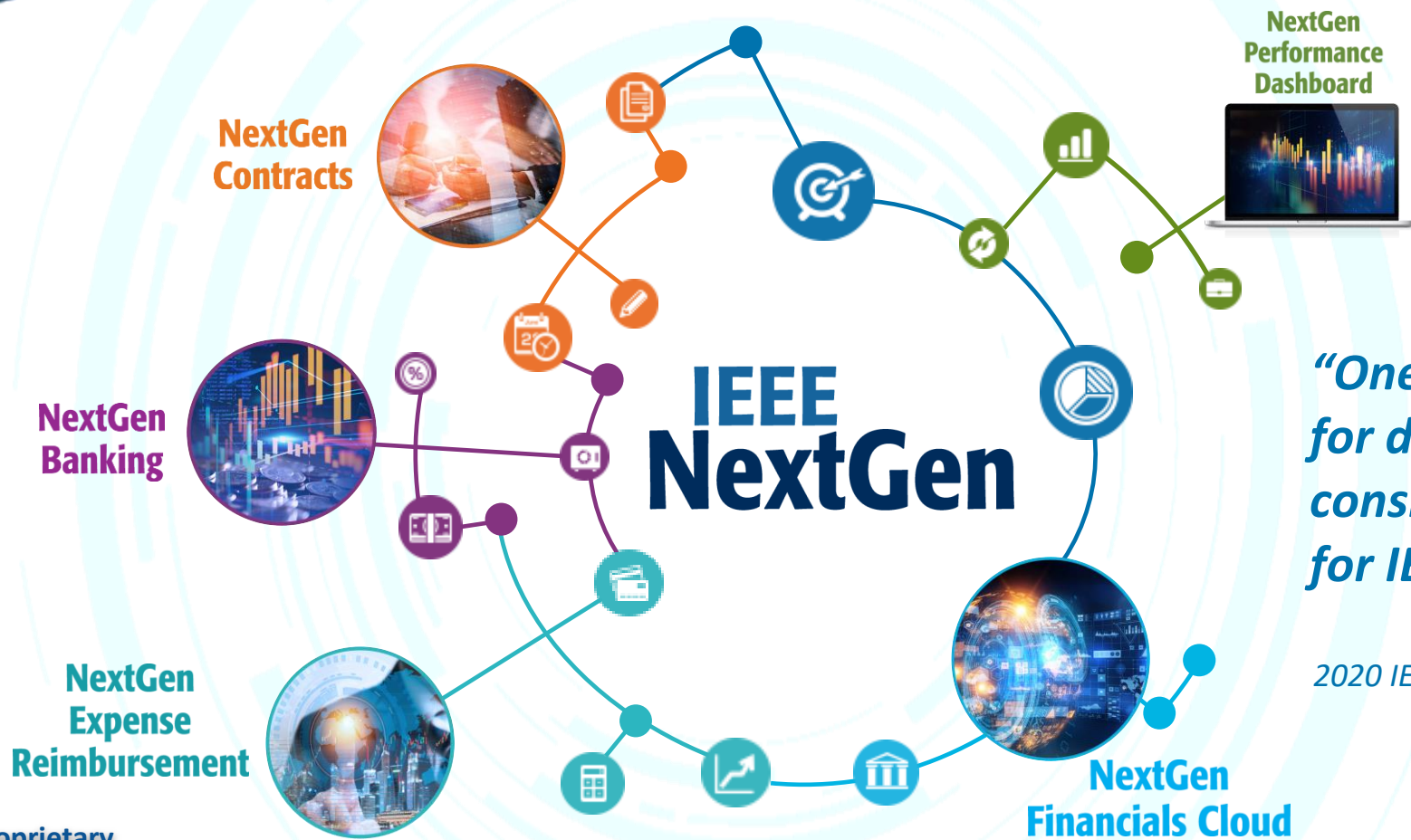


**Eliminate
confusion**



**Experience
greater
efficiencies**

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