

Oracle Cloud ERP Migration Supports Complex Business Needs and Strengthens Tax Processes in Procurement

Overview

For more than 100 years, Black & Veatch engineers have been driving innovation and delivery of water, power, and industrial infrastructure projects that help transform organizations, populations, and communities. Recognized for their vision and creativity, they design and deliver engineering projects that drive sustainability and improve quality of life for people in hundreds of countries around the world.

To streamline operations and reduce costs, Black & Veatch embarked on a digital transformation of their Finance, HR, and Procurement functions. They moved from a highly customized on-premise instance of Oracle E-Business Suite to Oracle Cloud ERP. The project included moving the on-premise Vertex tax engine (a critical component of their procurement process) to the cloud as well. The Vertex tax engine integration to Oracle Cloud ERP enabled even greater granularity for tax determination which reduced audit risk even further while enjoying all the benefits of a cloud deployment.

The Challenge:

As a global organization managing thousands of projects across hundreds of countries, Black & Veatch operates within a highly complex business environment—particularly in procurement and tax compliance. They must manage thousands of supplier invoices with thousands of line items, each with unique tax liabilities and exemptions.

“Our biggest challenge was just the large volume of transactions and data in the AP process, and the complexity of exemptions for sales tax on our invoices.”

Stefanie Albers, Director of Tax, Black & Veatch

Black & Veatch's business model requires them to support a complex intercompany invoicing process, which can include invoices from subsidiaries and projects with thousands of line items, each of which can include items which are taxed in different jurisdictions. This means accounting for different tax rates and regulations on every line of every invoice. The procurement team relied on the *Vertex O Series* tax engine to deliver precise sales tax calculations at the line level on each invoice, and to help standardize the consumer use tax accrual process for accurate tax reporting.

Migrating from a highly customized instance of Oracle E-Business Suite to Oracle Cloud ERP, with requirements to accommodate custom business and tax requirements, is never easy. The challenge for the ERP migration was supporting their business vision to transform their platforms and systems to drive innovation and efficiency without disruption to those processes and without increasing tax compliance risk.

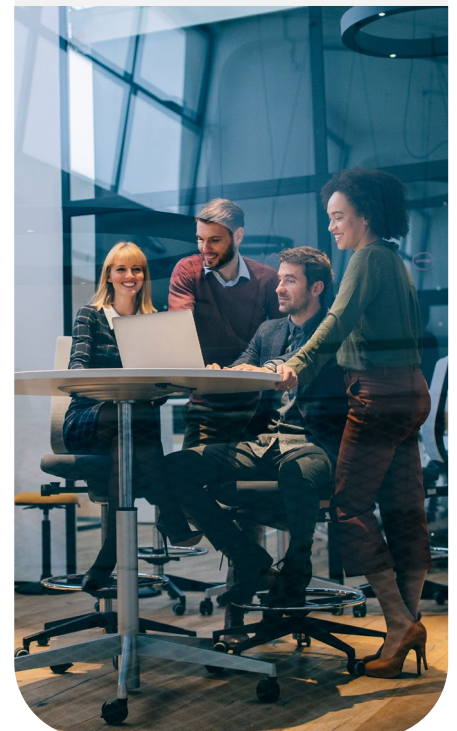
**BLACK & VEATCH**

Company Profile

- Engineering services
- Headquartered in Overland Park, KS, USA
- 100+ locations globally
- \$5.1 billion in revenue

Vertex Solutions

- Vertex O Series for Oracle Cloud ERP (for U.S. sales and consumer use tax in the procurement process)
- Vertex Indirect Tax Returns - North America





The Solution

Black & Veatch worked with Capgemini and Vertex to support their migration from Oracle E-Business Suite on-premise to Oracle Cloud ERP on Oracle Cloud Infrastructure (OCI). The migration was a multi-stage project that included the implementation, customization, and configuration of all systems to meet their complex Accounts Payable business requirements. Customizations included:

- Customization of the Vertex integration in the RealTimeBIP (RBIP) to pull data from Oracle Cloud ERP needed for accurate tax calculations on the AR Invoices.
- A custom workflow to ensure that all necessary data from their AR invoices was pushed to their AP invoices from Oracle Cloud ERP and the Vertex tax engine.

The ERP migration project also included migrating the Vertex O Series tax engine integration, which enabled the use of the more robust integration, the Vertex Accelerator for Oracle Cloud ERP. This new Vertex integration enabled Black & Veatch to send even more granular transaction data through the integration to improve the tax engine calculation, which ultimately improved downstream processes such as compliance reporting and returns filing.

The flexibility of the Oracle and Vertex solutions and platforms, and their seamless integration, allowed Black & Veatch to meet the complex needs of their business, improve procurement efficiency as well as tax accuracy.

In addition to shoring up sales tax calculations for every invoice, Black & Veatch automates the monthly sales tax returns process using Vertex Indirect Tax Returns. While this application does not integrate to Oracle Cloud ERP, the integration to O Series tax data is critical to ensure compliance.

“The Vertex implementation team came in with great confidence. Even after working through some complex challenges, they still met the original aggressive timeline, and met the business capabilities they promised. So, it was just one less thing I had to worry about because Vertex partnered with Oracle and took care everything.”

*Clifford Yeager,
Application Portfolio Manager,
Black & Veatch*

The Results

Facing growing complexity in U.S. tax compliance, Black & Veatch needed a scalable solution that could keep pace with their complex procurement challenges. Migrating their ERP system (and related sales tax engine) to Oracle Cloud ERP on Oracle Cloud infrastructure (OCI), Black & Veatch achieved the following results:

- A more effective, customized Accounts Payable workflow leveraging Oracle Cloud ERP and the Vertex integration and tax engine.
- Elimination of Tax and IT time and cost required to maintain Vertex tax engine content updates since the cloud deployment ensures all updates are handled by Vertex. This supports the ever-changing tax rules and rates for the 12,000+ taxing jurisdictions across the U.S.
- Improved processes for taxability decisions, including exemptions, on intercompany invoices.
- Improved processes for consumer use tax accrual to improve monthly compliance.
- Overall reduction in time and cost spent on system maintenance related to tax processes.



“Since our migration, the Vertex team has helped us simplify that process. We have fewer accrual errors to correct and that’s a big thing for us because when we do a correction, it means completing a journal entry and getting that posted. And also, potentially, manually recalculating the tax.”

Stefanie Albers, Assistant Director of Tax, Black & Veatch

Looking back on the completed project, Clifford Yeager, Application Portfolio Manager at Black & Veatch reflects that, “The ease of adopting and moving to the cloud is what was most impressive to me. The fact that within three months I’m already seeing improvements in reporting and other tax processes. We like the reports. We like the tax solution. We can now mature on this application.”

About Vertex

Vertex, Inc. is a leading global provider of indirect tax solutions. The Company’s mission is to deliver the most trusted tax technology enabling global businesses to transact, comply and grow with confidence. Vertex provides solutions that can be tailored to specific industries for major lines of indirect tax, including sales and consumer use, value added and payroll. Headquartered in North America, and with offices in South America and Europe, Vertex employs over 1,400 professionals and serves companies across the globe.

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