



# Future-Readying Tax and Finance in the Cloud:

Migration Best Practices for Oracle and Vertex Customers

## Executive Summary

Organizations running Oracle E-Business Suite, JD Edwards, or PeopleSoft are under increasing pressure to modernize their finance and tax infrastructure. Governments are accelerating the adoption of real-time reporting, e-invoicing mandates, and digital audit requirements, while business leaders expect finance organizations to deliver deeper insights through advanced analytics and artificial intelligence.

Cloud migration offers a strategic opportunity to address these demands. By moving Oracle workloads to Oracle Cloud Infrastructure (OCI) or migrating to Oracle Cloud ERP while modernizing tax with Vertex Cloud, organizations can create an integrated finance and tax architecture that is scalable, compliant, and ready for innovation.

Oracle provides the enterprise financial backbone for transaction processing, data management, and financial operations. Vertex delivers specialized tax determination and regulatory content that helps organizations calculate and manage indirect taxes accurately across jurisdictions. Together, Oracle and Vertex provide an integrated platform that allows organizations to automate tax determination within core finance processes while maintaining access to continuously updated tax content.

This combination allows organizations to:

- Manage complex global tax requirements directly within Oracle finance processes
- Stay current with evolving regulatory requirements through automated tax content updates
- Support emerging compliance models such as e-invoicing and real-time reporting
- Leverage high-quality tax data for analytics, automation, and AI-driven insights
- Future-proof their tax and finance architecture to support evolving business and regulatory demands

Whether organizations pursue a lift-and-shift migration to OCI or a broader ERP transformation to Oracle Cloud ERP, aligning tax modernization with the migration strategy ensures that finance and tax systems work together as a cohesive platform.

This paper outlines best practices for Oracle and Vertex customers planning a cloud migration. It examines the drivers behind cloud adoption, explores migration strategies, and highlights how Vertex Cloud and the Vertex Accelerator for Oracle Cloud ERP help organizations accelerate implementation while building a future-ready finance and tax environment.



## The Strategic Imperative for Cloud Migration

The imperative for technology modernization has escalated from a secondary objective to a principal concern at the board level. Accordingly, numerous organizations are prioritizing migration to cloud-based enterprise resource planning (ERP) systems. This transition is intended to enhance operational efficiency and productivity, minimize data silos, and improve scalability, while capitalizing on artificial intelligence, predictive analytics, and a growing array of advanced tools not available in legacy platforms.

Like many organizations, Oracle is actively encouraging customers to transition to the cloud—and provides strong incentives to migrate so they can benefit from the latest updates, advanced capabilities, AI features, and enhanced reporting.

Here at Vertex, we also encourage our customers to move to the cloud for these same reasons: AI-driven functionality, new agentic tools, and sophisticated reporting.

Customers also need to consider the following:

- **Rising Expectations for Finance and Tax**

Finance and tax leaders must balance operational efficiency with increasing regulatory complexity. In addition, they are simultaneously dealing with increased complexity and decreased resources—which makes the need to automate even more important as a way of managing costs and enhancing efficiency. More specifically, organizations are expected to manage:

- Global indirect tax regulations across multiple jurisdictions
- Real-time reporting and digital tax enforcement mechanisms
- Expanding e-invoicing mandates
- Increased demand for audit-ready financial data

These requirements place tax determination at the center of enterprise transaction processing.



- **The Role of Oracle and Vertex in the Enterprise**

Many organizations rely on Oracle systems as the core platform for financial operations, including order processing, procurement, and financial management. Oracle provides:

- Enterprise transaction processing
- Financial and operational data management
- Scalable cloud and ERP infrastructure
- Integrated finance processes

Vertex complements this environment by delivering specialized tax capabilities designed to integrate directly with enterprise ERP systems. Vertex provides:

- Automated indirect tax determination
- Continuously updated regulatory content
- Centralized tax rule management
- Global tax coverage across jurisdictions

Together, Oracle and Vertex create an integrated architecture where tax determination is embedded directly within financial transactions, enabling organizations to manage tax compliance as a seamless part of their business processes. More specifically, Vertex pre-built and validated compliance integrations and integrated returns for Oracle Cloud ERP translate calculation data into compliant reporting. This saves time and drives efficiency by collecting the right data, improving data accuracy, and streamlining the compliance process.

• **Technology Innovation Is Transforming Finance**

Technology is always changing and the impact to finance is no different. Modern finance organizations are increasingly adopting technologies such as:

- Artificial intelligence and machine learning
- Advanced analytics and forecasting tools
- Automated compliance monitoring
- Real-time operational reporting

These capabilities depend on consistent, high-quality financial and tax data. Cloud environments provide the infrastructure needed to support these technologies while maintaining data accessibility and scalability. More specifically, leveraging Vertex’s enhanced granularity, accuracy, and reconciled tax data strengthens data governance across finance and tax operations while improving confidence in downstream reporting, analytics, and AI workflows. Vertex also offers innovations, such as advanced dashboards, predictive analytics tools, or machine learning features that set us apart in the market—and help your business run smoother.

• **Future-Readying the Enterprise**

Cloud migration enables organizations to build an architecture capable of adapting to:

- New tax regulations and digital reporting mandates
- Increasing transaction volumes
- Expansion into new markets
- Emerging technologies such as AI and automation

Oracle continues to provide industry-leading features for tax and finance to take advantage of. A tax engine further extends that value and allows you to meet emerging use cases—positioning your organization for greater flexibility going forward with the ability to respond quickly to change while maintaining operational efficiency and compliance.



## Common Cloud Migration Paths for Oracle Customers

It is often a question of how and when to migrate to the cloud. Organizations moving Oracle workloads to the cloud typically follow one of two primary strategies depending on where they are in their journey to the cloud.

### • Lift and Shift to Oracle Cloud Infrastructure (OCI)

In this approach, existing Oracle applications are moved to OCI with minimal modification. We are the first tax technology provider to be able to integrate and host applications in OCI. We have our own OCI instances deployed around the world, where you can deploy Vertex O Series, as well as our integration for Cloud ERP. Therefore, if you are also hosting your application, everything can remain in the same environment—reducing latency and boosting your performance.

#### Benefits include:

- Faster migration timelines
- Reduced infrastructure management
- Immediate improvements in performance and scalability

However, organizations may still rely on legacy application architectures that limit their ability to fully leverage modern cloud capabilities.

### • Migration to Oracle Cloud ERP

Some organizations choose to modernize finance operations by migrating to Oracle Cloud ERP. Vertex can be integrated for sales, use, and value added tax—providing accuracy and end-to-end tax compliance, along with a powerful user interface that streamlines the integration process.

#### Benefits include:

- Cloud-native architecture
- Continuous innovation through Oracle updates
- Standardized financial processes
- Improved enterprise data accessibility
- Support for tax scenarios of any complexity for any size company
- Latest tax rules & rates with automated content updates and analytics
- Security, redundancy, scalability, and performance
- Flexible hybrid cloud deployment options

- Automated processes and centralized control
- Price transparency with multi-year lock options
- Reliable support and expertise

This approach often represents a broader transformation initiative that requires aligning cross-functional stakeholders, managing data integrity, ensuring system compatibility, and planning for business continuity. Successful migrations require not just technical expertise, but also a clear vision, strong leadership, and a commitment to collaboration across tax, IT, and finance teams.

### • Why Tax Must Be Included in the Migration Strategy

Tax and finance teams that still depend on spreadsheets, isolated tax engines, and manual reconciliations regularly contend with accuracy, efficiency, and resourcing challenges. Migrating to Oracle Cloud ERP without an integrated, cloud-based tax solution risks replicating similar legacy pain points in the new environment. Migration represents a strategic opportunity to replace manual activities with intelligent, automated processes. Much of the value of migrating to Oracle Cloud ERP extends beyond finance and accounting processes. Clean, reconciled, transaction-level tax data serves as the foundation for analytics, AI workflows, and predictive compliance capabilities.

#### Tax engines play a central role in enterprise transactions across:

- Order-to-cash
- Procure-to-pay
- Accounts receivable
- Accounts payable

Aligning Oracle and Vertex migration strategies ensures tax calculations remain accurate and compliant throughout the migration process.

## Drivers for Modernizing Vertex During Cloud Migration

Cloud migration provides an opportunity to modernize the tax environment alongside ERP systems.

### • Responding to Emerging Compliance Requirements

Tax authorities are increasingly adopting digital enforcement mechanisms, including:

- Mandatory e-invoicing frameworks
- Continuous transaction controls
- Real-time reporting obligations
- Digital audit programs

A modern tax platform ensures organizations can adapt quickly to these evolving requirements. For example, Vertex connectors make it possible to automate and streamline periodic VAT reporting and global e-invoicing directly from Oracle Cloud ERP.

### • Enabling Data-Driven Tax and Finance Operations

Modern tax and finance teams are using data to drive better decision-making. Integrating Vertex Cloud with Oracle systems enables organizations to:

- Centralize tax data across enterprise transactions
- Support advanced analytics and reporting
- Enable AI-driven anomaly detection and risk analysis
- Improve forecasting and planning

In addition, it provides tax determination and compliance across all business processes through real-time integration, intelligent import, and centrally located systems. It is also possible to achieve increased accuracy in your VAT processes and grow faster with precision.

### • Increasing Operational Efficiency

Cloud-based tax platforms help reduce operational complexity by:

- Automating tax rule and rate updates
- Centralizing tax configuration management
- Reducing manual intervention in tax calculations

By focusing on this automated approach, the amount of manual work is reduced, accuracy is increased, and tax, finance, and IT teams can focus on the higher value work that is critical to business growth.

### • Supporting Global Growth

As organizations expand into new markets, they face increasingly complex tax obligations. Vertex Cloud provides global tax coverage that integrates directly with Oracle finance systems, helping organizations manage cross-border transactions with confidence. The cloud is built for the jurisdictional compliance complexity, potential e-invoicing requirements, and audit scrutiny an organization may face as they grow.



## The Role of Vertex Cloud and the Vertex Accelerator for Oracle Cloud ERP

A powerful user interface makes it possible to streamline manual steps and provides a nearly push-button setup of the Vertex tax engine—making it possible for your organization to quickly take advantage of the new functionality. Not to mention, the pre-built connectors and rapid deployment options lead to minimal business disruption during migration.

- **Vertex Cloud for Modern Tax Determination**

Vertex Cloud provides a modern tax determination platform designed to integrate with enterprise ERP systems such as Oracle Cloud ERP. Key capabilities include:

- Automated tax determination across jurisdictions
- Continuous regulatory content updates
- Centralized tax rule management
- Integration with Oracle financial processes

This architecture allows organizations to maintain accurate tax calculations while ensuring compliance with evolving regulatory requirements.

- **Vertex Accelerator for Oracle Cloud ERP**

The Vertex Accelerator simplifies the integration between Vertex Cloud and Oracle Cloud ERP. Key benefits include:

- **Faster Implementation:** Prebuilt integration components reduce configuration complexity and accelerate deployment timelines.
- **Reduced Deployment Risk:** A proven integration architecture helps ensure stable tax functionality during ERP migration.
- **Faster Time to Innovation:** Organizations can quickly establish a cloud-based tax platform capable of supporting analytics, automation, and emerging compliance models.

The Vertex Accelerator for Oracle Cloud ERP also fully automates AR and AP processing, eliminating the need for manual updates for unintegrated tax touchpoints or additional charges for multiple tax calls on a single transaction. In addition, it provides transaction monitoring for improved visibility, troubleshooting, and issue resolution.



## Cloud Migration Best Practices for Oracle and Vertex Customers

Successful migrations require coordination across IT, finance, and tax leadership. That is an important first step, which includes:

- **Align Stakeholders Early**

Ensure that tax leaders are involved in cloud architecture and migration planning from the beginning.

- **Evaluate Current Tax Architecture**

Assess existing tax configurations, integrations, and reporting processes to identify opportunities for modernization.

- **Design an Integrated Finance and Tax Environment**

Ensure that Oracle ERP processes and Vertex tax determination work together to support end-to-end transaction processing.

- **Build a Data Strategy That Supports Analytics and AI**

Organizations should prioritize data quality and accessibility to support advanced analytics and emerging technologies.

- **Prepare for Evolving Compliance Requirements**

Ensure systems can support:

- E-invoicing mandates
- Real-time reporting
- Digital audit capabilities
- New global regulatory frameworks

The second step, for the members on the front lines who are responsible for bringing the solution to life, is having access to the support and expertise, pre- and post-implementation, of Vertex's dedicated global team of Oracle-certified consultants and support specialists.

## Business Outcomes of a Modern Oracle and Vertex Cloud Architecture

Organizations that modernize ERP and tax infrastructure together can unlock several strategic benefits:

- **Stronger Compliance and Risk Management**

- Automated updates for tax rules and regulations
- Consistent tax calculations across global operations

- **Greater Visibility Through Data and Analytics**

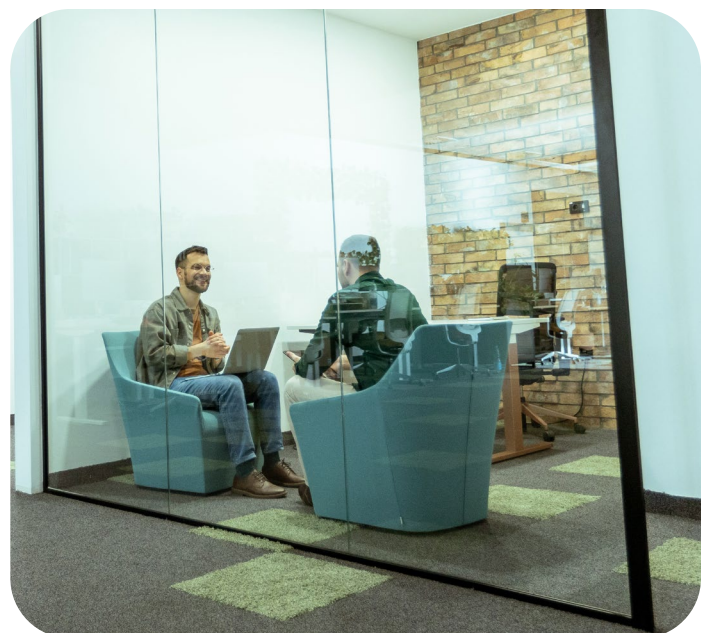
- Access to accurate tax data across enterprise transactions
- Enhanced reporting and audit readiness
- Support for AI and advanced analytics initiatives

- **Operational Efficiency**

- Reduced manual tax maintenance
- Simplified system management and updates

- **A Future-Ready Finance and Tax Platform**

- Supports evolving regulatory requirements
- Enables emerging technologies
- Scales with business growth and global expansion



## Real-World Advantages

It is helpful to consider how these plans and actions manifest in real-world cloud migrations. For [Black & Veatch](#), a global engineering firm managing thousands of supplier invoices across hundreds of countries, an Oracle Cloud migration was part of a comprehensive finance, HR, and procurement transformation that offered a related opportunity: reducing the complexity of calculating precise sales and consumer use tax on every line item of thousands of supplier invoices.

The company's accounts payable requirements are demanding. Intercompany invoices from subsidiaries and project entities can contain thousands of line items, each subject to different tax rates, exemptions, and rules. Managing that complexity accurately—at scale and without disruption—required more than a standard ERP upgrade.

Working with Capgemini and Vertex, Black & Veatch migrated their on-premise Vertex O Series tax engine to the Oracle Cloud Infrastructure (OCI), via the Vertex Accelerator for Oracle Cloud ERP, to unlock a more granular flow of tax and transaction data. Data quality improvements strengthened tax calculations, tightened compliance reporting, and streamlined returns filing. These gains helped produce a more accurate, lower-maintenance tax compliance process that freed tax and IT teams from the burden of manual content updates across 12,000+ U.S. taxing jurisdictions.

Other payoffs also materialized quickly. Within three months of go-live, consumer use tax accrual processes improved significantly, reducing accrual errors and eliminating the manual journal entries and tax recalculations those errors previously triggered.

That timeline demonstrates the upside of including tax automation in the core migration plan.

## Conclusion

Cloud migration represents a critical opportunity to modernize both ERP and tax systems. When Oracle enterprise finance platforms are combined with Vertex Cloud tax determination, organizations gain an integrated architecture that embeds tax directly within financial processes while maintaining access to continuously updated regulatory content.

By aligning Oracle cloud strategies with Vertex Cloud and leveraging the Vertex Accelerator for Oracle Cloud ERP, organizations can reduce migration risk, accelerate implementation, and build a finance and tax platform capable of supporting future regulatory, technological, and business changes.

For tax, finance, and IT leaders, treating tax modernization as a strategic component of cloud transformation ensures that organizations can move to the cloud with confidence while building a foundation for long-term compliance, insight, and innovation.



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