

## SAP Vertex Implementation Case Study

**Project:** SAP ECC 6.0 Implementation with Vertex O-Series External Tax

**Industry:** Energy / Manufacturing

### **Business Challenges:**

Global SAP Implementation with ECC 6.0 and Vertex required all tax decisions be moved into the Vertex system rather than the SAP system and maintained by the corporate tax department. The consolidation of two SAP systems required migrating exemptions into the Vertex system and automating these decisions from a SD perspective. Automation of the tax decisions for the procure-to-pay process was included.

### **High Level Business Solution:**

Provided overall project management of SAP Vertex Implementation which included planning, scoping, design, data modeling, testing and delivery. Implemented the Vertex External tax system for the US and Canadian transactional taxes into a single source of information for all reporting of country, state, and local sales and use tax returns. Configured SAP system for external taxing and worked closely with team leaders to ensure master data was configured in the manner required for usage of the Vertex system.

### **Business/Technical Solution Details:**

- Gathered the reporting requirements during the blue print phase of the project to determine the scope of the project by interacting with the stake holders and business process owners.
- Worked closely with the SAP business analyst and power users to finalize the functional specification for converting the existing applications that included Vertex O-Series 4.1.
- Defined the architectural design and data model for the Vertex configuration for five separate filing entities.
- Conducted collaboration session with the users and analyst to finalize the design for all the reporting requirements.
- Assisted with the development and performed all testing of User Exits required to pass additional data elements from the host system to Vertex.
- Configured all the back end and front end manual configuration in both ECC and Vertex system related to system performance.
- Created and maintained all technical and functional specifications for both ECC and Vertex.
- Developed the testing strategy and conducted integration testing and acceptance testing with the SAP analyst and business users to make sure the requirements were satisfied.
- Trained all the power users and SAP analyst on how to execute the BI reports via portal and educate them about the functionality of BI Reporting.
- Designed the data flow sequence for loading transaction and master data from ECC and external application with all the inter dependencies into account.
- Prepared the pre go-live check list for system configuration, development objects, data loading and reports.