



Tax Wizard Application



BizTalk Server 2006 / SQL Reporting Services 2005 - Case Study

The Summary

Client had their existing software application "Tax-Wizard" designed for Tax calculations. This software automated computation of Taxation and generation of various forms required by IT-Department for employees of its clients. The client wanted to enhance existing Tax Application by incorporating more features and functionalities. The client had forwarded a set of enhancements /modifications list to AG Technologies to seek their support in incorporating these modifications in their existing application.

The Client

Our client is one of the world's largest accounting firm, and also one of the oldest practitioners offering auditing and accounting services around the globe. The firm also provides legal services and services relating to emerging growth companies, human resources issues, and corporate transactions (mergers and acquisitions, IPOs, and the like). It has one of the world's largest tax practices, serving multinational clients that have to comply with multiple local tax laws.

The Business Requirement

- To have a "Tax-Wizard" application, which automates computation, keeps record of Taxation and generates various forms required by IT- Department for employees of its Clients.
- Increase the flexibility of the application for sustaining a Dynamic Tax Treatment environment.
- Set up robust scalable solution architecture in place that will serve client's requirements.
- Provide a manageable solution meeting performance requirements for 250 distributed peak simultaneous users and potentially 200 external users as well on a scale-up/out model.
- The application should also keep track of the TDS returns submitted by the clients and their employees.

Project Summary

Industry: Consulting

Client Profile: The client is a world's largest accounting firm

Business Requirements:
Client wanted to have a Tax Wizard Application

Solution:
Enterprise Application Integration (EAI) with Taxation rules in rule engine using BizTalk Server 2006 and effective reporting using SQL Reporting Services 2005.

Solution Benefit:

- Track communications between the client, consultants and the end users
- Close integration with Active Directory
- Audit trail in tracking and reverting to a previous state.
- Effective Reporting generated using SQL reporting.



AG Technologies

- With modifications / addition in the features and functionalities of the application they were looking for enhancements in the existing application.
- Application should incorporate new rule changes in taxation with ease.
- Application should integrate with other existing applications with ease.

The Solution

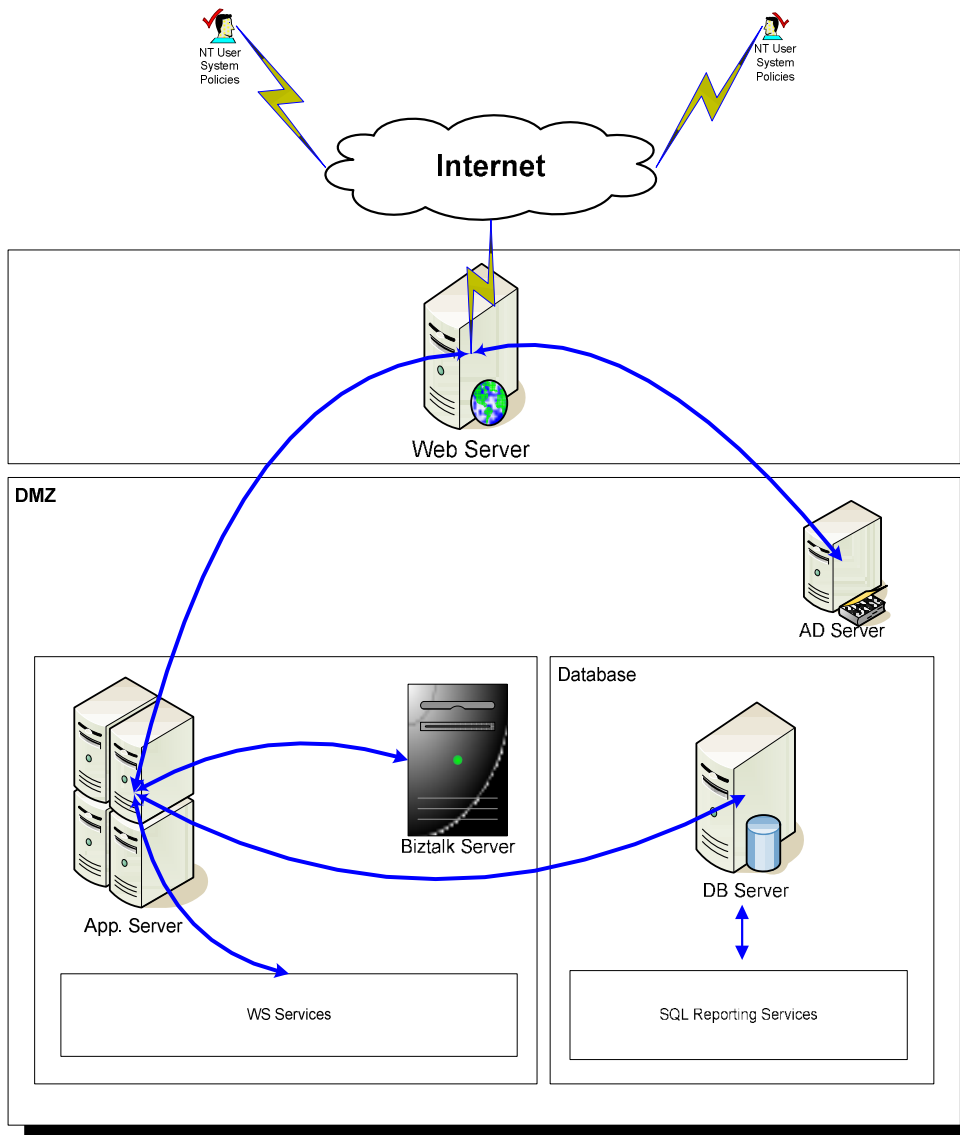
AG Technologies functional consultant rolled the whole project by:

- Developing framework/s that would render generic services. The framework/s would provide functionality that would be required by various Income Streams, forms and reports.
- Taxation rules as per 2005-06 included according to Indian scenarios.
- Full tax calculation automation with workflow using orchestration feature of "BIZTALK 2006".
- Normalization and migration of old database to "SQL Server 2005".
- The reports were generated using SQL Server 2005 Reporting Services. Reports authored, managed, delivered and secured easily using the inherent capabilities of SQL Server 2005 Reporting Services. The various Income Tax forms were designed and implemented in SQL Server 2005 Reporting Services. Ad-hoc reporting, a key feature of SQL Server 2005 Reporting Services was used to leverage the reporting experience of the users.
- All reports were made available over the internet so that any authorized user could view the reports at any point of time. The users could use multiple formats like excel, pdf, word to save the reports.
- Provide Enterprise Application Integration (EAI) with their other existing applications.



Conceptual Architecture Overview Diagram

Conceptual Architectural Overview Diagram





AG Technologies

Technology and Tools:

The Solution was built on following Technologies:

- Microsoft Windows Server 2003 Enterprise Edition
- Microsoft BizTalk Server 2006
- Office 2003 on all client machines
- Microsoft Visual Studio .NET 2005
- Visual Studio Tools for Office
- Microsoft SQL Server 2005 Enterprise Edition with Service

The Solution Benefit

- Modifying a tax rule or defining new tax rule can be done easily. The changes can be reflected in the IT forms instantaneously.
- Close integration with Active Directory builds up on the security.
- Keeping track of communications between the client consultants and the end users.
- Audit trail helps in tracking and reverting to a previous state.
- Workflow ensures that none of the rules are applicable unless they are authorized.
- Data updated by the end user is made available to the Client consultant instantaneously.
- Use of SQL Reporting Services facilitated in knowing the status of the various IT returns appeals etc for a particular user.