

## Case Study

# TaxAct

Tenant Split: TaxAct's Historical Data Solution



**Industry:** Software as a Service



**Employees:** >300

### Company Summary:

TaxAct is a leader in the tax preparation industry, focused on providing affordable solutions for electronically filing taxes. Since its founding in 1998, TaxAct has e-filed more than 90 million tax returns and was the first to provide free filing services. TaxAct was historically operated within a larger corporate framework alongside another entity.

## THE CHALLENGE

TaxAct determined that Workday would still be the right ERP system for their needs after separating from the parent structure. Collaborating closely with Workday's M&A and Kognitiv's teams, TaxAct procured their own Workday tenant which replicated the existing configuration from the parent tenant. But the new tenant did not preserve any historical data. TaxAct's primary concern at the time of contracting with Workday was the preservation of their historical data across the system, both transactional data and attachments such as GL documents, resumes, and offer letters.

TaxAct relied on their Workday and Kognitiv partners to develop several approaches to historical data conversion that would meet TaxAct's needs to preserve seven years of history and associate all attachments

with the correct Workday components. Different solutions were explored including leveraging Prism, however Prism's attachment limitation ruled out that option. After thoroughly understanding TaxAct's true data needs two different solutions were deployed for HCM and Payroll and another for Financials.



**Maintaining Data Integrity During Transition**



**Complexity of Historical Data Preservation**



**Tailoring Solutions to Unique Data Needs**

## THE SOLUTION

Historical data for HCM and Payroll was determined to be needed for audit and reference purposes only. The team foresaw the need to revisit the data ad hoc and they did not have the need to see the data directly in Workday. TaxAct determined that the best solution was to export all historical worker data from the parent company's tenant and save that data in a secure data repository outside of Workday. All worker demographics, organization and pay data was exported and added to cold storage for future use. TaxAct did request that process attachments and other worker documents be preserved and loaded back to Workday where possible. To make this happen, Kognitiv leveraged the same technique for resumes that they were proposing for Financial attachments. [Click Here to learn more about this project.](#)

TaxAct leveraged the same method to extract and load their historical worker documents such as resumes, offer letters, and performance reviews from their parent to their new production tenant. This in-tenant solution for active workers allowed their document records to be complete and easy to reference for TaxAct's HR users.

Very thankful for the innovative minds at Kognitiv for our Workday Financial Implementation. They stepped in and saved the day for our implementation to go live without delays. They were able to bring automation to load years of historical data accurately, with attachments at a critical time in our project ... We are grateful for your amazing skills, hard work, and dedication with our Workday Implementation.

- Julie Scroggins, Workday System Administrator

## THE IMPACT



**Innovative Solution Implementation**

TaxAct collaborated with Kognitiv to create a unique in-tenant solution, incorporated seamlessly into the implementation project and successfully launched on schedule.



**Groundbreaking Historical Data Alignment**

Despite the challenges, TaxAct achieved a groundbreaking feat by aligning seven years of financial data with appropriate attachments in their new Workday instance, demonstrating unprecedented efficiency.



**Cost-Effective Decision-Making**

Opting out of Prism as a partial solution not only streamlined processes but also saved TaxAct a significant annual subscription cost, showcasing strategic and cost-effective decision-making.

