



Migration of Thomson Reuters CS Suite with UltraTax from TR Virtual Office to Apps4Rent Citrix Desktop

Background:

A New-York based CPA firm was looking for an alternate hosting provider to migrate from Thomson and Reuters CS Citrix environment due to occasional technical issues and service disruptions they were facing. The client needed to move ten years' worth data along with their applications including UltraTax CS (2010-2019), Practice CS, FileCabinet CS, and MS Office Suite to a different hosting service that supported these applications with minimum possible disruption. The Client preferred hosting on the Citrix platform as their users were comfortable with their software suite. They approached Apps4Rent for moving the applications and the associated data to virtual desktops hosted by Apps4Rent.

Apps4Rent's Solution:

Apps4Rent offered the client a choice of plans from two virtualization technologies. Between Microsoft Virtual Desktop and Citrix Virtual Desktop, the client chose the latter as their users had previous experience with that interface. Apps4Rent migrated the client's entire workload from the Thomson and Reuters Citrix environment to Citrix Virtual Desktop hosted by Apps4Rent. The migration process was laborious and challenging but was meticulously managed by Apps4Rent



Company

New York Based CPA firm

Industry

Accounting and Tax
Preparation Services

engineers. In addition to the applications that the client was already using, Apps4Rent also helped the client adopt Office 365 ProPlus on their new virtual machines.

Result

Apps4Rent was able to successfully migrate the client's workloads from their Thomson and Reuters Citrix environment to Apps4Rent hosted Citrix Virtual Desktop. All applications including UltraTax CS (2010-2019), Practice CS, and FileCabinet CS were operational with their Dedicated Gold Citrix Virtual Desktop Plans with Office 365 ProPlus by Apps4Rent. The legacy MS Office Suite data was transferred to the cloud-based Office 365 ProPlus suite. Backup and configuration issues with some of the applications were resolved. The whole project was completed in a small window of 1 week without any downtimes or loss of data. The client was delighted with the outcome as they got better service at about half the price they were paying previously.

Background:

A New York-based certified public accounting (CPA) firm offering tax and audit services to companies was looking for assistance to migrate their content, data, and CS Applications from their Thomson and Reuters CS Virtual Office environment. Around January 2020, there was some instability in TS Virtual Office environment which was reported in forum discussions as well as Accounting Today. Besides slowness issues, the customer was facing particular issues related to saving Excel files in "File Cabinet CS" that had not been resolved. These frustrations forced the Client to hunt for an alternate virtual hosting provider with experience hosting TS CS Suite of products. The Client screened several vendors and selected Apps4Rent based on their strength in hosting accounting and tax applications including UltraTax CS and other modules of the TS CS Suite. The client was also comforted by the fact that Apps4Rent was a Citrix partner as Citrix was their choice of virtualization technology. Savings of about 50 percent over existing costs were also an added benefit.

What Apps4Rent Offered

Apps4Rent has deep expertise in providing hosting services and offers solutions from leading virtualization solutions providers like Microsoft and Citrix. The client had a requirement to move all the applications including UltraTax CS, Practice CS, FileCabinet CS, and MS Office Suite to a reliable managed virtual desktop. Based on a careful assessment of the client's needs, Apps4Rent consultants inferred that Microsoft Virtual Desktop and Citrix Virtual Desktop plans had the capability and necessary technology to accommodate the client's requirements. While the former solution had additional features such as the support for peripherals like scanners, the latter was a familiar solution to the client. In both cases, Apps4Rent provides round-the-clock technical assistance and migration services through phone, chat, and email support.

Migration to Citrix Virtual Desktop Dedicated Gold Plan

The client decided to opt for the Citrix Virtual Desktop Dedicated Gold Plan by Apps4Rent. This plan is the top-of-the-line offering by Apps4Rent with robust resources such as 100 GB disk space, 8 GB RAM, additional sharable space of 5 GB, 4 vGPUs along with the option to add Office 365 ProPlus and the flexibility of installing custom applications. These features backed by the reliability and affordability of Apps4Rent services and perhaps the familiarity with the Citrix environment helped the client in deciding that Citrix Virtual Desktop Dedicated Gold Plan was the right choice for them.

Challenges of Implementation

The migration from the Thomson and Reuters Citrix environment to Apps4Rent hosted Citrix Virtual Desktop was anything but straightforward. The range of applications and their contents that the client had accumulated increased the complexity of the operations.

Backup Problems

Apps4Rent engineers initiated the process of migration by taking backups for Accounting CS, FileCabinet CS, Practice CS, and Ultra Tax CS (years 2010 - 2019) as is the norm with all migrations. While some of these applications behaved as expected, backing up Accounting CS were taking an unusually long time and resulted in only 46 files being backed up initially.

Licensing Issues

The client was using several versions of UltraTax CS from 2010 through 2019. Each version had to be backed up and installed separately. Apps4Rent engineers created backups of UltraTax CS for different versions including 2011, 2012, and 2013 on the client's local desktop. However, while installing UltraTax versions 2017, 2018, and 2019, license errors were observed. Additionally, the team observed issues while launching UltraTax CS 2010 and 2015.

Data Migration Issues

Applications were installed on the client's virtual machines one after the other. After their installation, data had to be restored in their respective applications. While the client managed to restore their data for most applications, they singled out Practice CS for which they required migration assistance. On further inspection, the team found that the support article by Thomson Reuters to migrate Practice CS data to another server could not be of much assistance in resolving the issue.

More Errors

After the applications were installed, the client was asked to verify and test; as is the norm before the cutover to the new environment. They noticed some errors on the applications installed on their newly acquired virtual machines. Users were unable to create empty documents on the FileCabinet CS application. Moreover, they observed that all UltraTax versions except UltraTax 2019 were throwing errors on launch. If it were any consolation, these were non-fatal errors and the users could continue to work with data on the application.

Troubleshooting Implementation Challenges

Apps4Rent engineers were successful in overcoming each of these challenges with skill and collaboration efforts with the client and other stakeholders. All requirements ranging from minor configuration requests such as creating shortcuts for Office applications on desktops to ensuring that all the data generated throughout the history of the client with the earlier provider was available on Apps4Rent hosted Citrix virtual desktops were fulfilled by the engineers. The team discovered that some errors like the one on FileCabinet CS could be resolved by granting appropriate permissions or making minor configuration changes, while other issues such as the inability to create backups for Practice CS required collaboration with an appropriate support team. Apps4Rent engineers did not rest till they had resolved any outstanding issues. Thus, Apps4Rent managed to onboard the client in a short duration.

Conclusion

The client continues to use Apps4Rent services. They have joined a growing list of over 10,000 happy customers whom Apps4Rent has served in its 17+ years of operations. The client uses all their applications they were earlier using on their new Apps4Rent hosted virtual desktops. In addition to that, they now have Office 365 ProPlus subscriptions for their users for enhanced productivity and collaboration. Overall, Apps4Rent has provided the client with a much more reliable virtualization solution that is backed with 24/7 support over the phone, chat. And to top it off, the client saved over 50 percent in their hosting costs.