

Product Release 2016

This release affects the Corptax suite of products listed below:

Calendar	Insurance	Sales and Use Tax
Compliance	International Compliance	State Planner
Data Collect	Office	State Provision
Data Exchange	Partnership	Tax Contingency
e-File	Premium Tax	WorkSpace*
Entity Management	Provision	Web Parts*
IFRS	S Corp	

**See the accompanying section for additional web server requirements.*

Important Notes

- Versions of Corptax 2016 require .NET 4.6. (see [Workstation Requirements](#) below for more information).
- Corptax supports Internet Explorer (IE) versions 10 and higher.
- If you are a Software as a Service customer (Corptax hosts your data), you must comply with requirements for workstation hardware and software.
- These specifications serve as a guideline. Your needs may vary depending on the number of simultaneous users, the number of tax years, the size and variety of general ledger charts, network capacity, and the number of consolidations and combinations.
- Software requirements may change during a product year based on the specifications of third-party vendors. You should update to the latest service packs and apply other software updates as they are released. The Corptax policy is to support new service packs within three months of their official release.
- Corptax will support at least the current two major versions of Microsoft products.
- Corptax requires WebSocket protocol.
- We encourage you to evaluate your computer system before you install Corptax products. Ensure that your system meets or exceeds the minimum requirements. You may not be able to perform some functions within the system if you are not operating on the minimum requirements.
- Internet service (port 443) is required for Corptax to function properly.
- For Corptax Office, the web version of Office 365 does not work with Excel add-ins. You must use the desktop version of Excel.
- If you need help determining your needs, please create a support case on [Corptax Connect](#).

Visit [Corptax Connect](#) for immediate access to our comprehensive customer support resources: Knowledge Base, Training Center, Wall of Feedback, case management, frequently asked questions, and product downloads. Connect with the Corptax community to learn from your peers and contribute your own best practices as you leverage the power of Corptax Connect.

Changes from 2015 to 2016 System

Workstation

- Browser: IE 10 and up or Windows Edge
- Operating system: Microsoft Windows 8.1 or 10, in addition to Windows 7
- Microsoft .NET Framework 4.6
- Monitor resolution: 1280 x 768 resolution (or better)

Server

- Microsoft .NET Framework 4.6.1
- Memory (RAM): 128 GB Recommended/96 GB Minimum
- Corptax requires internet access to the corptax.com domain from the application servers. Without this access, features such as collateral updates and activation will not work. Specific sites that access needs to be allowed include: update services, support services, licensing services and Corptax Help. Port 443 should be open to allow access for the functions supporting activation, collateral update and Corptax Help. Port 80 should be open to support RSS feeds for the Start Page.
- Corptax requires WebSocket protocol.

Workstation Requirements

Physical workstations are recommended. See [Service & Support](#) on the Corptax website for more information.

Component	Suggested	Notes
Processor and Speed	2.0 GHz Dual Core	
Memory (RAM)	8 GB Recommended 4 GB Minimum	The amount of RAM installed on a workstation affects performance, especially when viewing comprehensive calculations (large consolidations) and running several programs simultaneously. Corptax will use more RAM as needed.
Available Hard Disk Space	2 GB	Free disk space should be monitored following standard guidelines suggested by Microsoft for maintaining a healthy system.
Monitor	1280 x 768 resolution (or better)	
Operating System (32- or 64-bit)	Microsoft Windows 10	Also supported: Microsoft Windows 8.1 Microsoft Windows 7 SP1
Microsoft .NET Framework	4.6 or higher	
Browser	Microsoft Edge Microsoft Internet Explorer 11	Also supported: Microsoft Internet Explorer 10 NOTE: If you use Active Directory authentication, you must use Internet Explorer.
Microsoft Office	Microsoft Office 2016 The Corptax Office add-in is compatible with both the 32-bit and 64-bit versions of Microsoft Excel.	Also supported: Microsoft Office 2013 Microsoft Office 2010
Internet Access	Internet access is required.	

Server Requirements

Application servers

Corptax may operate in a virtualized environment for application servers. The virtual environments resources allocated to Corptax must be equivalent to the system requirements set forth for physical servers. Refer to [Support for Virtualized Environments](#) for details.

See [Service & Support](#) on the Corptax website for more information.

Component	Suggested	Notes
Processor and Speed	Intel Xeon E5/E7 v2 or better, 2.2Ghz or better, 8 core or better (or equivalent)	
Memory (RAM)	128 GB Recommended 96 GB Minimum	Memory affects Corptax performance. Minimum RAM is appropriate for smaller companies. Increase RAM if you have many users or entities.
Available Hard Disk Space	32 GB	Free disk space should be monitored following standard guidelines suggested by Microsoft for maintaining a healthy system.
Operating System	Microsoft Windows Server 2012 R2, Standard or Datacenter	Also supported: Microsoft Windows Server 2012, Standard or Datacenter
Internet Information Services (IIS)	IIS 8.5	Also supported: IIS 8.0
Microsoft .NET Framework	4.6.1	
Microsoft SQL Server Management Objects	12	Included with the installation media at <i>CorpTax20yy\redist\smo</i>
Internet Access	Corptax requires internet access to the corptax.com domain from the application servers. Without this access, features such as collateral updates and activation will not work. Specific sites that access needs to be allowed include: update services, support services, licensing services and Corptax Help. Port 443 should be open to allow access for the functions supporting activation, collateral update and Corptax Help. Port 80 should be open to support RSS feeds for the Start Page.	Internet access is required for the application server for any sites on corptax.com. Access is required for product activation and FBAR transmissions. Future Corptax releases may add additional functionality that will also require the server to have internet access.
WebSocket Protocol	Corptax requires WebSocket protocol.	

Note: Review [What needs to be considered when sizing servers for hosting Corptax?](#) in Corptax Connect for information on self-hosting.

Database servers

Corptax recommends using dedicated, physical database servers. You should not use a virtualized environment for database servers. See [Service & Support](#) on the Corptax website for more information.

Component	Suggested	Notes
Processor and Speed	Intel Xeon E5/E7 v2 or better, 2.2Ghz or better, 8 core or better (or equivalent)	Server processor and speed affect Corptax performance.
Memory (RAM)	128 GB Recommended 96 GB Minimum	<ul style="list-style-type: none">• Memory affects Corptax performance. Minimum RAM is appropriate for smaller companies. Increase RAM if you have many users or entities.• 96 GB minimum should be allocated to the database instance hosting Corptax databases.• Larger databases may need additional allocated memory for the database instance.• Follow Microsoft best practices for reserving enough memory for OS resources when allocating memory for database instances.
Available Hard Disk Space	60 GB	Free disk space should be monitored following standard guidelines suggested by Microsoft for maintaining a healthy system.
Database	Microsoft SQL Server 2014, Standard or Enterprise	Also supported: Microsoft SQL Server 2012, Standard or Enterprise
Collation	SQL_Latin1_General_CP1_CI_AS	

Data Exchange Web Services SDK

Data Exchange Web Services requirements include those listed above for workstation and server, plus the following:

Component	Suggested	Notes
Microsoft Visual Studio	Microsoft Visual Studio 2013, Update 5 or higher	
Claims Authentication with ADFS		
Microsoft .NET Framework	4.6	

Corptax WorkSpace and Web Parts System Requirements

Web Server Requirements

Corptax may operate in a virtualized environment for application servers. The virtual environments resources allocated to Corptax must be equivalent to the system requirements set forth for physical servers. Refer to [Support for Virtualized Environments](#) for details.

See [Service & Support](#) on the Corptax website for more information.

These are additional system requirements. Please confirm you meet the requirements for Workstation, Database and Application servers.

Component	Suggested	Notes
Processor, Processor Speed, and Available Hard Disk Space	Must meet Microsoft requirements for SharePoint Server 2010 at http://technet.microsoft.com/en-us/library/cc262485%28v=office.14%29.aspx	
Microsoft SharePoint Server	SharePoint 2010, Enterprise, SP1	
Microsoft SQL Server Management Objects	12	Included with the installation media at <i>WorkSpace 20yy\redist\smo</i>