

Product Release 2017

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	
Entity Management	Provision	
IFRS	S Corp	

Important Notes

- Versions of Corptax will require self-hosted customers to have Microsoft .NET Framework 4.7 installed on their servers as soon as it is released.
- Versions of Corptax 2018 will require customers to have Microsoft .NET Framework 4.7 installed on their workstations. (See [Workstation Requirements](#) below for more information).
- Corptax supports Internet Explorer (IE) version 11, Windows Edge, and Google Chrome. (See [Workstation Requirements](#) below for more information about browser requirements for Corptax Office). **Note:** The Support link in Corptax opens using Internet Explorer 11 regardless of your default browser setting.
- 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 are a Software as a Service customer (Corptax hosts your data), you must comply with requirements for workstation hardware and software. **Note:** This does not apply if you are using Application Hosting.
- Internet service (port 443) is required for Corptax to function properly.
- Corptax utilizes TLS (Transport Layer Security) for secure encrypted communications via the internet.
- Corptax requires WebSocket protocol.
- Corptax will support at least the current two major versions of Microsoft products.
- Software requirements may change during a product year based on the specifications of third-party vendors. The Corptax policy is to support new service packs within three months of their official release. You should update to the latest service packs and apply other software updates as they are released.
- 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. 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.
- 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 2016 to 2017 System

Workstation

- Browser: IE 11, Windows Edge, or Google Chrome
- Microsoft .NET Framework 4.6.2
- Monitor resolution: 1920 x 1080 resolution (or better)

Authentication

- Claims-based authentication requires SHA-256 certificates for both certificate and federation metadata algorithms. For more information, refer to *Configuring Claims Provider Information for Corptax SaaS* in Corptax Help.

Active Directory

- Active Directory authentication is no longer being offered as an authentication option for Corptax

Server

- Microsoft .NET Framework 4.6.2
- Operating System: Added support for Microsoft Windows Server 2016 Datacenter or Standard

Workstation Requirements

Physical workstations are recommended. 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	2.0 GHz Dual Core	
Memory (RAM)	8 GB	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	1920 x 1080 resolution (or better)	Also supported: 1280 x 1024
Operating System (32- or 64-bit)	Microsoft Windows 10	Also supported: Microsoft Windows 8.1 Microsoft Windows 7 SP1
Microsoft .NET Framework	4.6.2 or higher Note: Versions of Corptax 2018 will require customers to have Microsoft .NET Framework 4.7 installed on their workstations.	
Browser	Microsoft Edge Google Chrome Microsoft Internet Explorer 11	Microsoft Edge or Microsoft Internet Explorer is required for Corptax Office. The Support link in Corptax opens using Internet Explorer 11 regardless of your default browser setting.

Component	Suggested	Notes
Microsoft Office	<p>Microsoft Office 2016</p> <p>The Corptax Office add-in is compatible with both the 32-bit and 64-bit versions of Microsoft Excel.</p>	<p>Microsoft Office is not a requirement unless you are using Corptax Office.</p> <p>Also supported:</p> <p>Microsoft Office 2013 Microsoft Office 2010</p> <p>For Corptax Office, the web version of Office 365 does not work with Excel add-ins. You must use the desktop version of Excel.</p>
Internet Access	Internet access is required.	<p>Log in to Corptax Connect first, then access this document: What IP Address Range Can *.corptax be Hosted by to Configure Firewall Rules, for more information.</p>

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	Memory affects Corptax performance. 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 2016, Standard or Datacenter	Also supported: Microsoft Windows Server 2012 R2 , Standard or Datacenter Microsoft Windows Server 2012 Microsoft Windows Server 2008 R2 SP1
Internet Information Services (IIS)	IIS 10.0	Also supported: IIS 8.5
Microsoft .NET Framework	4.6.2 Note: Versions of Corptax will require self-hosted customers to have Microsoft .NET Framework 4.7 installed on their servers as soon as it is released.	
Microsoft SQL Server Management Objects	16	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.	Log in to Corptax Connect first, then access this document: What IP Address Range Can *.corptax be Hosted by to Configure Firewall Rules , for more information.
WebSocket Protocol	Corptax requires WebSocket protocol.	

Note: Log in to Corptax Connect first, then review [What needs to be considered when sizing servers for hosting Corptax?](#) 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	<ul style="list-style-type: none">• Memory affects Corptax performance. Increase RAM if you have many users or entities.• 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 2016, Standard or Enterprise	Also supported: Microsoft SQL Server 2014 or 2012, Standard or Enterprise
Collation	SQL_Latin1_General_CP1_CI_AS	

Data Exchange Web Services SDK

Data Exchange Web Services SDK 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	4.6.2	