ONESOURCE®

TRUST & ESTATE ADMINISTRATION

System Requirements



**Proprietary Materials**

No use of these Proprietary materials is permitted without the express written consent of or license from ©1999-2018, Thomson Reuters/ONESOURCE. Altering, copying, distributing, or reproducing any of these proprietary materials in any manner is expressly prohibited.

**Software License Agreement**

The right to use the software product described in this workbook is specifically conditioned upon your execution of and compliance with the Tax License Agreement with ©1999-2018, Thomson Reuters/ONESOURCE.

All contents copyright ©1999-2018, Thomson Reuters/ONESOURCE.

Contents

Introduction 1

System Requirements 2

Frequently Asked Questions 3

Introduction

The ONESOURCE Trust & Estate Administration programs (formerly Fast-Tax FPS) may be installed on either a workstation or network server.

Please review the following system requirements to determine if your computer equipment meets the recommended systems requirements.

If you require additional information or assistance please consult with our Sales department at 800.331.2533. M-F 8am-5pm Eastern.

For more information about any of the listed system requirements, contact our Support group at 800-327-8829 option 1, 2, 8a-7p Eastern Monday-Friday.

System Requirements

| **Component** | **Requirement** |
| --- | --- |
| **Computer and processor** | Minimum Intel Pentium IV 1.8 GHz processor or faster is recommended.  Applications are 32-bit and are tested and compatible with 64-bit Operating Systems. |
| **Memory** | Minimum 2GB (2048MB) of RAM, 4GB+ RAM recommended. |
| **Hard disk** | Minimum 50MB hard-disk space per application per year and 1MB per Client. |
| **Display** | 1024 × 768 or higher-resolution monitor, 96DPI (Normal/100%) Font Size. Custom font sizes as high as 115% have been reported to function but anything above 96DPI/100% is NOT supported. 1041 2012 and later REQUIRES 96DPI/Normal/100% Font Sizes. Minimum 64MB video RAM per monitor, 512MB video RAM per monitor recommended for best performance. HD Aspect Ratio Resolutions (720i, 720p, 1080i, 1080p) are not supported (FAQ 6). |
| **Office Suite** | Office 2010-2016 and Office 365 32-bit required for zCalc (Tool Box/Estate Planner and/or Presentations) (FAQ 10). Office for Mac and 64-bit versions of Office are not compatible or supported. Document Management systems may interfere with zCalc functionality. |
| **Operating system**  **(desktop)** | Microsoft Windows 7, 8.1, and 10 are tested and function, but some features may require elevated permissions via Run As Administrator (FAQ 5). Virtualized Windows Desktop Environments function and require Advantage Database Server license. Microsoft .NET Framework v4.5.2 required for certain applications including 1041 e-Filing and 1041 Printing.  Windows XP and Vista are no longer supported and Windows 8 is no longer tested. (FAQ 7, 8) We DO NOT support running on Mac hardware using Windows, nor in a Linux OS. |
| **Network OS (Server)** | Windows Server OS versions 2008-2012 tested and functional. Server 2016 is untested, but functions. Remote Desktop, Citrix and Terminal server require an Advantage Database Server license. Remote environments based on Server 2012 strongly recommended to use ADS 11. We do not support use of our applications within Novell networks, Peer-to-Peer desktop, DFS, FQDN, Apple/Mac, Linux server, or SAN/NAS. UNC path shortcuts are NOT supported; drive letter mappings are REQUIRED. |
| **Printer** | Laser printer with 4MB (minimum) or 8MB (recommended) memory, PCL5 or PCL5e driver, HP driver rated. |
| **Internet Connection** | A broadband Internet connection is required to download and register the software from our website, for operation of the program, and for 1041 E-filing.  The 1041 2014-year requires Microsoft Internet Explorer 11 (FAQ 9); ActiveX controls must be allowed to download or be manually installed for functionality. Compatibility View settings may be required. |
| **Data Backups** | Each firm is responsible for their own data backups. We DO NOT support installing and running the programs from an external backup device. We do not provide for automated data backups. Integrated backup services (Carbonite, Dropbox, Memeo, etc) used as the installation location for the program install may negatively impact usage of the program. |

Frequently Asked Questions

**Q1:** Will the ONESOURCE Trust & Estate Administration software run on a Netbook or Tablet?

**A:** The ONESOURCE Trust & Estate Administration software will run on a Netbook or Tablet running Windows OS (Win7 or newer) however keep in mind that those devices are typically slower than a “full featured” laptop or desktop. Additionally, the applications are NOT optimized for touchscreen input or for the screens smaller than those which are typically available on standard laptops or desktop computers.

**Q2:** We use a Document Management System (DMS). How will that affect the ONESOURCE Trust & Estate Administration software?

**A:** zCalc is the only application directly affected by DMS. Since that application utilizes various XLS and XLSM files for its functionality, most DMS attempt to “save” or otherwise “relocate” those files as zCalc tries to use them, but they must remain in their original locations. It is recommended to set up some sort of exception or otherwise prevent the DMS from interfering with zCalc’s normal functionality.

**Q3:** A Peer-to-Peer Network is basically “host/workstation” environment. Why isn’t it supported?

**A:** Peer-to-Peer networks rely on the permissions and stability of the host computer. The permissions, provided by the computer’s operating system, often require too much fine-tuning (compared to an actual server OS) for correct functionality. Additionally, Anti-virus present on both host and secondary systems combined can impact functionality of the programs as they are designed for “workstation-specific” scanning and aren’t usually intended to function as a “server” of files or programs. Last, if the host computer gets shut down, restarts, etc while the programs are in use, this can cause problems for the secondary systems’ access of any installed applications.

**Q4:** The hard disk requirement states “Minimum 50MB hard-disk space per application per year and 1MB per Client.” What is the maximum requirement?

**A:** There is no foreseeable maximum requirement due to the fluid nature of the client data files being created and edited during use of the programs. Below is a table with some examples of client usage, but keep in mind these figures are estimations and may differ based on other data inputs.

*Transaction versus file size note*: File size increases versus the number of transactions entered is NOT directly proportional. Numbers listed are estimated examples.

|  |  |  |  |
| --- | --- | --- | --- |
| **Application** | **New Client** | **Active Client** | **Notes** |
| FAS Accounting | 225KB | 2MB | 550KB client has 100 transactions. 2MB client has 1000 transactions. 6MB client has 3000 transactions. See Transaction note above. |
| Federal 706 (Estate Tax) | 404KB | 1.12MB | Different state estate selections can also add minimal size due to differing processing requirements. See also transaction notes. |
| Federal 709 (Gift Tax) | 80KB | 83KB | Approximate per Filing Year. Additional years will increase overall client folder size. |
| Federal 1041 (Fiduciary Income Tax) | 289KB | 1.36MB | Approximate per Filing Year. Additional years, state returns, and e-filing (including PDF attachments) will increase overall client folder size. |
| zCalc Tool Box | 11KB | 45KB | Additional planners populated with entries will increase the client size. |

As an extreme example, the full install of all ONESOURCE Trust & Estate Administration programs, including all years, all state modules, all Sample client data files for respective years (approximately 98 samples) and all utility applications (Archive Manager, Evaluations Interface, and Common Assets) from 2004 to December 2016 weighs in around 3.1GB.

**Q5:** What does the statement “Windows 7, 8.1, Windows 10, are tested and function, but some features may require elevated permissions via Run As Administrator” entail?

**A:** Windows 7 (and newer versions of Windows) have special requirements (due to their heightened security settings) when activating certain features in our programs.

Registering (only needs to be done once per program, generally), Checking for Updates, most processes that require the program to communicate with the internet (including getting Securities Pricing through our Evaluations Interface and 1041 E-Filing) will all trigger the User Account Control.

This means you will get a box that says "Are you sure you want to allow this program to make changes to your computer?" and you would want to say "Yes."

In some instances (most often Registration and Check for Updates) it's also necessary to run the program with "elevated permissions" by right-clicking on the program icon and choosing "Run As Administrator."

We have no other method by which to bypass these security checks.

**Q6**: Why are displays with HD Aspect Ratio not supported?

**A**: At this time, our tax form (706 Federal and State Estate and Inheritance Tax, 1041 Fiduciary Tax, and 709 Gift Tax) products cannot support wide aspect ratio resolution on computer systems whose native display resolution is an HD resolution. The font size will be out of proportion to the rest of the form image on screen. Typically laptops will be shipped with HD screen capability. In some cases, using an external monitor set to a resolution that is NOT an HD aspect ratio resolution may alleviate the issue.

**Q7:** Why are Windows XP and Windows Vista no longer supported?

**A:** Windows XP is no longer supported by Microsoft as of April 8th, 2014.   
Microsoft ceased security updates for Windows Vista on April 11, 2017. ONESOURCE will no longer be testing our products on either operating system.

**Q8:** Why is Windows 8 no longer being tested?

**A:** Microsoft ceased security updates for Windows 8 on January 12, 2016. Their recommendation is for Windows 8 users to update to Windows 8.1 or 10. ONESOURCE will no longer be testing our products on the Windows 8 operating system.

**Q9:** Why is Internet Explorer 11 now required?

**A:** Microsoft ceased supporting older versions of Internet Explorer on their “currently active” operating systems. Windows 7 and 8.1 will require Internet Explorer 11. Windows Vista will only support Internet Explorer 9. IE 9 under Vista is sufficient for e-filing for 1041 tax year 2014 however will no longer be tested or supported by ONESOURCE. Please see this link for more details: <https://support.microsoft.com/en-us/lifecycle#gp/Microsoft-Internet-Explorer>

**Q10**: [Office 2007 has reached End of Life](https://support.office.com/en-us/article/Office-2007-End-of-Life-roadmap-416c54d8-823c-4def-bb7a-6a9b14ef2745?ui=en-US&rs=en-US&ad=US) and is no longer supported by Microsoft. How can ONESOURCE continue to support Office 2007?

**A**: The zCalc Tool Box / Estate Planner Product was developed with Office 2007 compatibility and is still expected to function. However with Microsoft no longer supporting Office 2007, the 2018 release of zCalc will no longer be tested or supported to be used with Office 2007.