GOSYSTEM TAX™

RS QUICK START GUIDE

FOR TAX YEAR 2020

Last Updated: November 05, 2020

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GETTING STARTED WITH GOSYSTEM TAX

Use this *Quick Start Guide* to set up GoSystem Tax so that you can get started with tax preparation activities. Please read all sections carefully before launching this product, so that you are familiar with environment requirements and setup features.

WORKSTATION REQUIREMENTS AND SETUP

Please see *2020 Supported Environments (page 17)*.

MULTI-FACTOR AUTHENTICATION

Multi-factor authentication must be set up for users before they can use the program.

For more information on administrator procedures, please see the information at this URL (click to view): **https://www.riahelp.com/html/2020/rsstart/content/mfa_admin/toc_mfa_admin.htm**.

For information on user setup, please see the information at this URL (click to view): **https://www.riahelp.com/html/2020/rsstart/content/mfa_user/toc_mfa_user.htm**.

LAUNCHING THE PROGRAM

For Tax Year 2020

For this tax year and tax years in the future, you can use the browser of your choice. Internet Explorer is no longer required, as there is no client download.

To access the login screen:

1. Launch your browser.

2. Enter **https://gosystemrs.fasttax.com** in the **Address** field.

3. Enter your login ID, firm, location, and password as identified in the e-mail correspondence sent with this document, or as provided by your Administrator.

> Thomson Reuters provides your Firm Administrator with a login ID, firm, location, and password. All other Administrators and users must be set up by your Firm Administrator, or an Administrator within your firm with the appropriate rights.

For Tax Year 2019 and Prior Tax Years

To access the login screen, launch Internet Explorer and enter the address identified in Step 2 below. The first time you attempt to login, and periodically when we update the system, a small download or footprint is downloaded to your computer. This is called the RS Client, and it enables communication between your desktop and our systems.

To access the login screen and download the client, follow the steps below.

1. Launch Internet Explorer. Select the Internet Explorer icon from the Windows task bar and select *Run as administrator*.

2. Enter **https://gosystemrs.fasttax.com** in the **Address** field.

3. Enter your login ID, firm, location, and password as identified in the e-mail correspondence sent with this document, or as provided by your Administrator.

> Thomson Reuters provides your Firm Administrator with a login ID, firm, location, and password. All other Administrators and users must be set up by your Firm Administrator, or an Administrator within your firm with the appropriate rights.

4. When you log in for the **first time**, a security prompt appears, asking if you wish to install and run the ActiveX Control. Select **Install** or **Run** to install the various add-ons. You may need to repeat this step several times until you have installed all add-ons.

5. The **Install RS Client Software** page appears. Click **Install**.
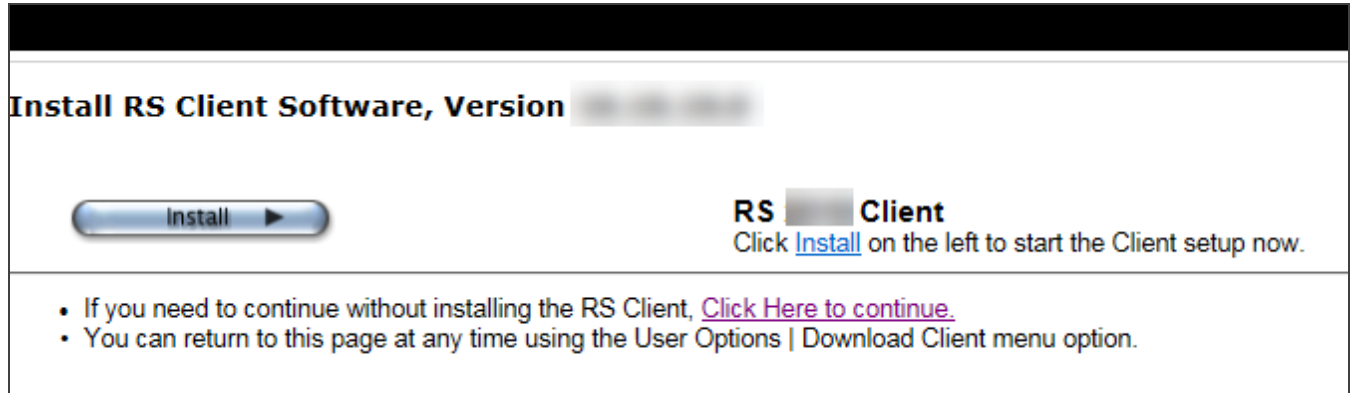
Figure 1

6. A security warning will appear, asking if you want to **Run** or **Save** the **setup.exe** file to your hard drive. You must click **Save** so that you can install the RS Client later. If you do not click **Save**, the RS Client will not register properly. Browse to the desired folder on your workstation where you want to save the **setup.exe** file, and click **Save** again. You may also choose the **Save As** option to point to your desired destination drive and path. The **Save As** option allows you to rename the **setup.exe** file when it is downloaded.
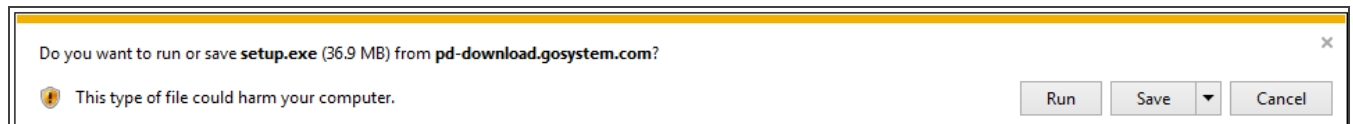
Figure 2

7. To install later, browse to the folder where you downloaded the Client file, and right-click **setup.exe** to run the installation. Select the option to *Run as administrator*.
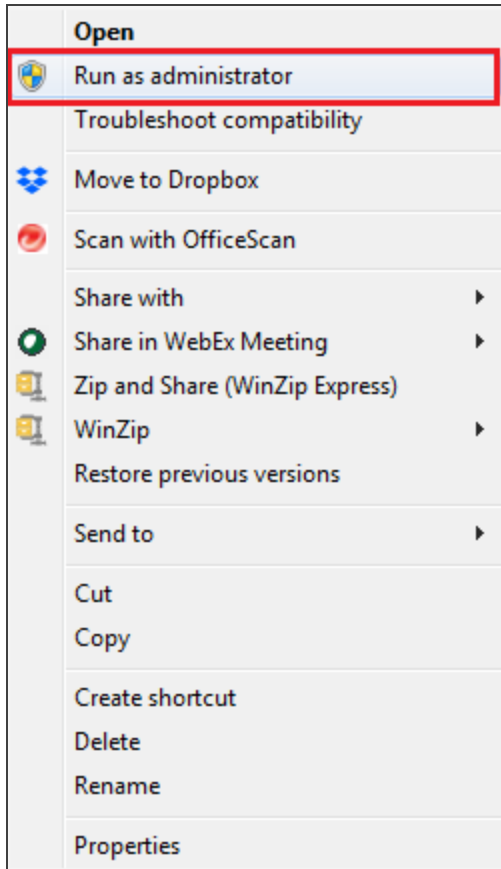
Figure 3

8. The User Account Control (UAC) screen appears, asking your permission to continue with the installation. Select *Yes*.

9. If required components are not already installed on the workstation, you will be prompted to download and install those components.
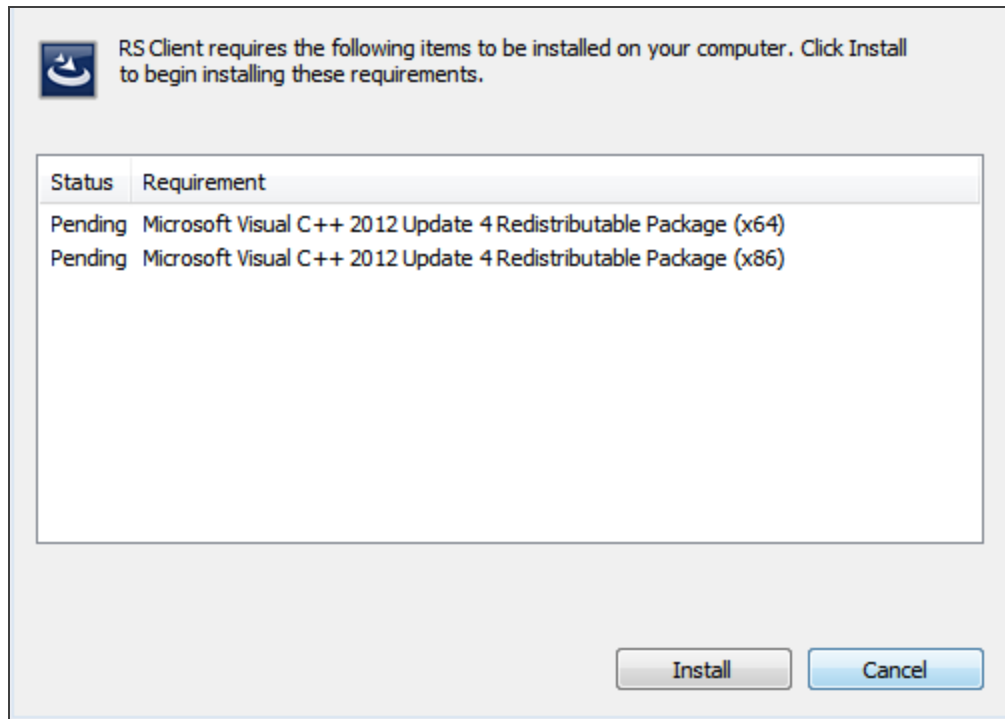
Figure 4

10. Depending on which required components are already present on your workstation, the list of pending requirements may change. Required components include the following: .NET 4.6 Framework, Microsoft Visual Studio 2012 C++ runtime, Microsoft Visual Studio 2015 C++ runtime, Microsoft Access database engine 2010.

11. The InstallShield wizard appears. Click **Next**.
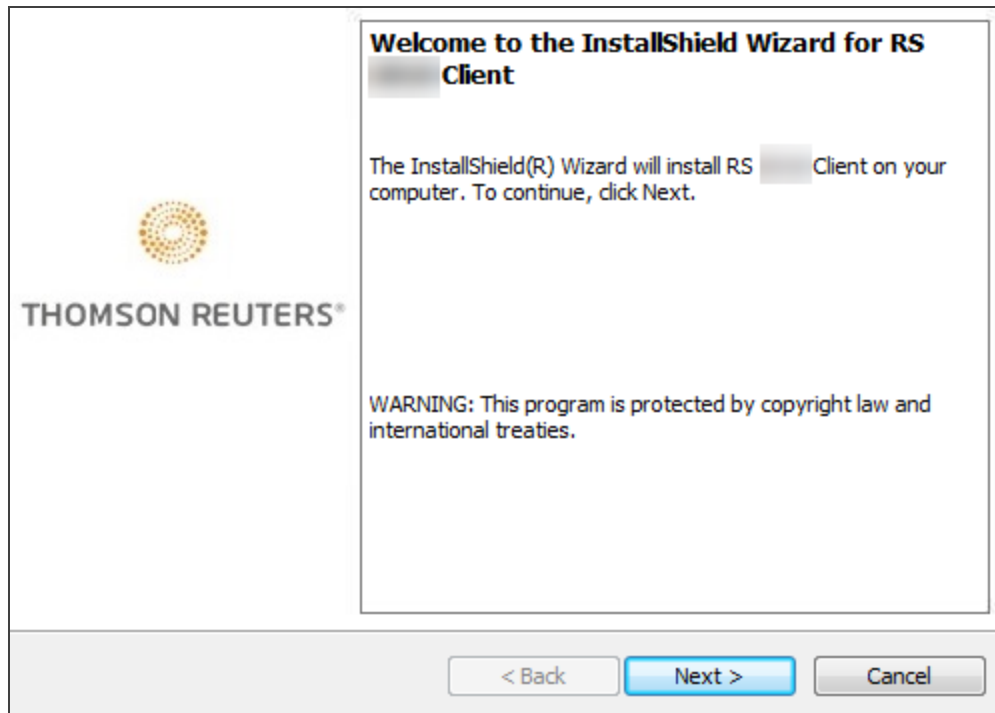
Figure 5

12. A screen appears with the default destination folder. Click **Next**.
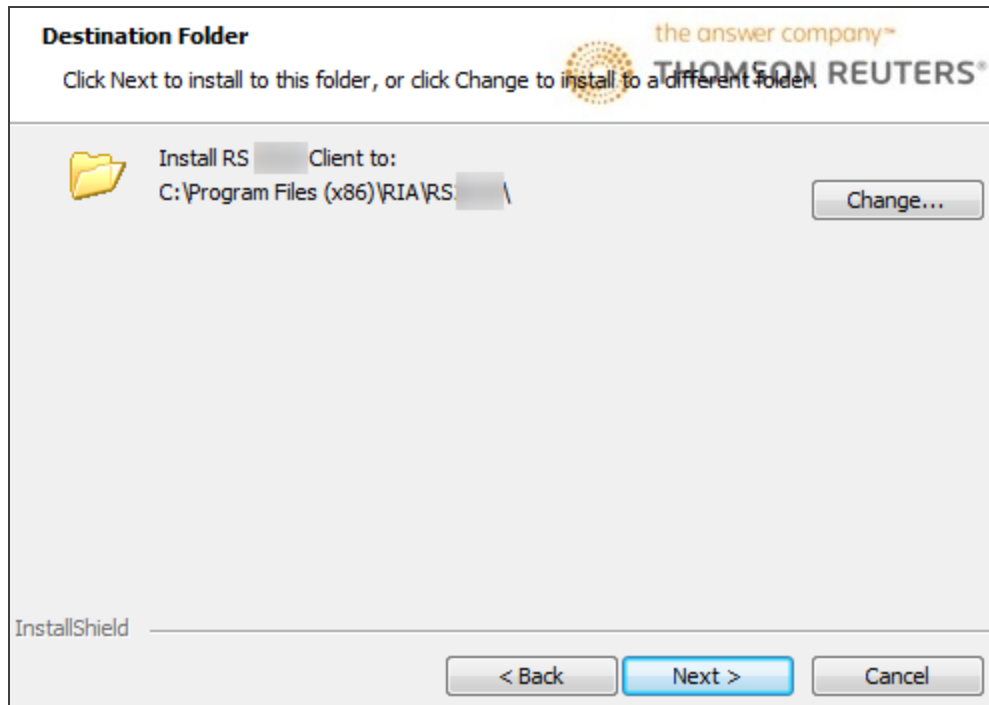
Figure 6

13. The RS Client is ready to install. Click **Install**.

Ready to Install the Program

The wizard is ready to begin installation.

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Click Install to begin the installation.

If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.

InstallShield

[< Back]   [**Install**]   [Cancel]
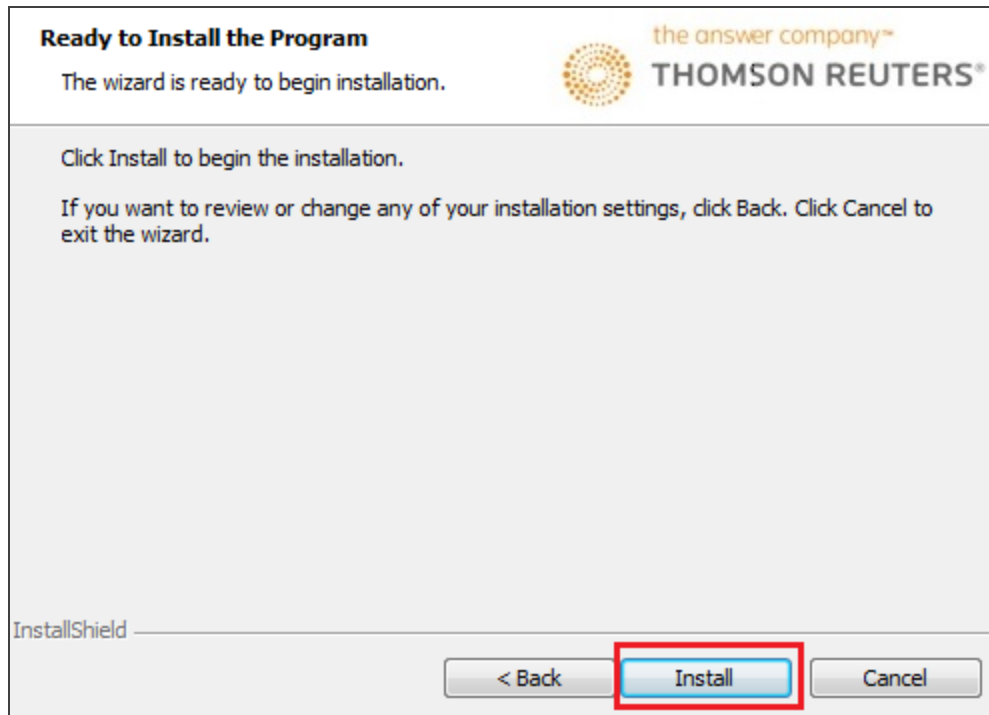
Figure 7

14. During installation, you will see the same screen, along with a progress indicator.

15. Once the installation is complete, the following screen appears to indicate that **Setup** is complete. Click **Finish** to enter the RS Browser.
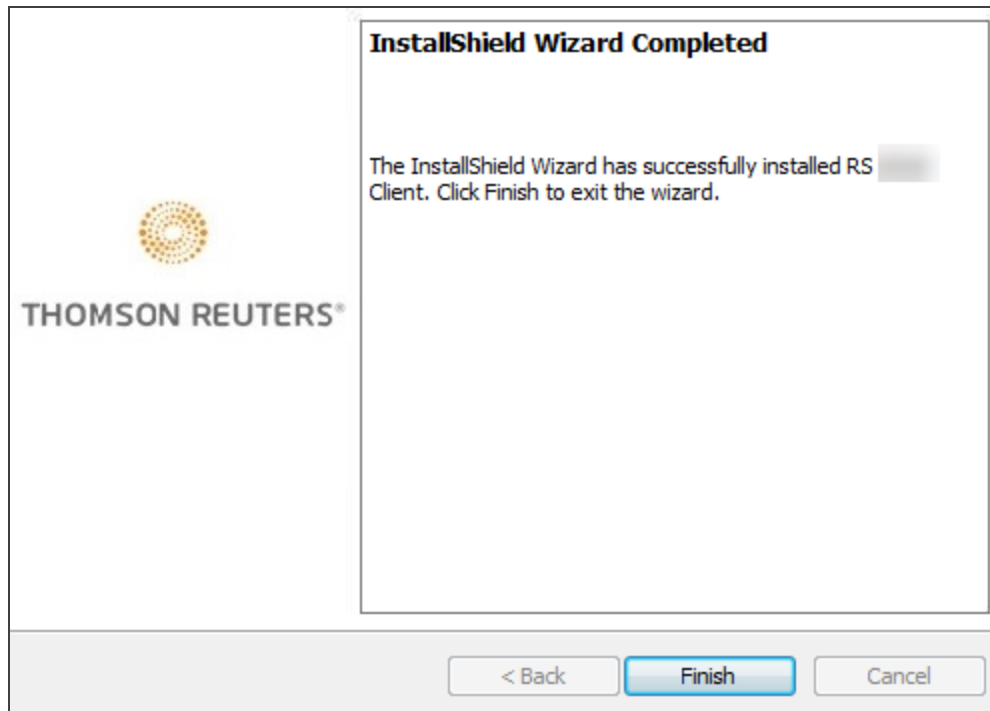
Figure 8

16. You may receive a prompt to install the RS Documentation Integration ActiveX Control. If so, select **Install**. If you have installed this previously, you will not receive a prompt.

TYPES OF USERS AND THEIR RIGHTS

Four types of users are distinguished by the level of rights they have:

FIRM ADMINISTRATORS	• Initiates first login for the firm • Has access to all accounts for the firm • Has access to all users in all groups within the firm • Sets up groups and group access • Sets up the location names used on the login screen • Assigns account numbers to groups • Assigns location administrators to groups • Assigns Tax Defaults to locations
LOCATION ADMINISTRATORS	• Sets up users for their location • Sets user access • Sets user login IDs and passwords • Sets up Administrators within their location • Assigns account numbers for users • Assigns returns to groups or users • Updates Tax Defaults assigned to their locations
REGIONAL ADMINISTRATORS	• Same rights as Location Administrator, but can also setup Administrators in authorized locations.
USERS	• Accesses accounts assigned by Location Administrators • May belong to more than one group if authorized by a Location Administrator • May allow Support to access returns assigned to them

ADMINISTRATOR RIGHTS AND ACTIVITIES

SETTING UP USERS

1. To add a user, select **Admin > Access Control > Users** tab.

2. Click the **New** button.

3. Enter user information, and then add the user to one or more groups.

SETTING UP GROUPS

You may create groups to grant different levels of access to different users.

1. To create a group, select **Admin > Access Control > Groups** tab.

2. Click the **New** button.

3. Enter the name of the **Group** in the **Name** field.

4. Enter the location (for example, *Atlanta Office*) in the **Location** field.

5. Indicate the rights for the members of the group by checking the boxes to indicate their rights to

    - **Add Returns**

    - **Delete Returns**

    - **Assign Returns**

    - **Set Passwords**

    - **Rollover without Delete Rights**

    - **Bypass return passwords for batch print**

    - **Mask Certain Personally Identifiable Information**.

6. Click the **Accounts** tab, and assign the **Account(s)** that you wish to allow the group to access.

7. Click the **Users** tab and select the users you wish to assign to the **Group**.

VIEWING A USER'S RIGHTS

1. Select **Admin > Access Control > Users** tab.

2. Select the user from the list.

3. Click **Rights**, or click **Edit**, and then click **Rights**.

4. The user's rights appear.

CHANGING A LOGIN PASSWORD

1. Select **User Options > Password**.

2. Enter the old password in the **Old Password** box.

3. Enter the new password in the **New Password** box and in the **Confirm Password** box.

4. Click **Update** to save the new password.

SETTING UP TAX DEFAULTS

1. Select **Admin > Tax Defaults**.

2. Select the appropriate account number and year to edit.

3. Click **Open** to open tax defaults for that account.

4. To assign tax defaults to a specific user location, click **Assign**, and select the location from the drop-down box. Click **Update** to save your changes.

5. To rebuild tax defaults, click **Rebuild**. A message appears indicating the tax defaults for the specified account and year have been queued for rebuild at the server. Click **OK** to indicate that the defaults should be rebuilt. Choose **History** to verify that **Rebuild** has finished successfully.

6. Click **Rollover** to roll over your tax defaults from one tax year to the next. The rollover process completes within a few minutes. View **History** to verify that **Rollover** has finished successfully.

SETTING UP MILESTONES (FOR USERS OF GOTRACKER ONLY)

1. Select **Admin > Milestones**.

2. Select the entity for which you are adding a milestone: *Firm* or *Location*. If you select *Location*, a drop-down list appears. Select the appropriate location from that list.

3. Click **Add** to the right of the milestone list.

4. A new dialog box appears in the middle of the screen. Add the milestone, and click **OK** to add it.

5. The milestone now appears in the list of milestones.

SETTING UP TASKS (FOR USERS OF GOTRACKER ONLY)

1. Select **Admin > Tasks**.

2. Select the entity for which you are adding a task: *Firm* or *Location*. If you select *Location*, a drop-down list appears. Select the appropriate location from that list.

3. Click **Add** to the right of the task list.

4. A new dialog box appears in the middle of the screen. Add the task, and click **OK** to add it.

5. The task now appears in the list of tasks.

SETTING UP PREFERENCES

1. From the main menu, select **User Options > Preferences**.

2. Select the applicable option(s) to indicate if you wish to show any of the preference details for each return.

3. Certain details are automatically selected, including return, year, account, type, and subtype.

4. Click **Update** to save your changes.

5. Click **Close** to return to the main screen.

CREATING AND FINDING RETURNS

CREATING A RETURN

1. Select **Returns**.

2. Select an account and tax year.

3. Click the **Create** option.
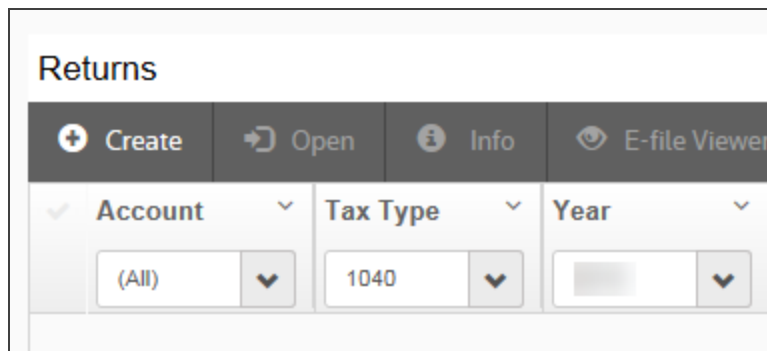
4. Enter other return information on the **New Return** screen.

5. To open the new return automatically, check the box to open the return in a new window after creating.

6. Click **Create** when you are finished.

Figure 10

SELECTING AN EXISTING RETURN FOR EDITING, PRINTING, OR OTHER ACTIVITY

1. Select **Returns**.

2. Specify criteria to limit your search.

3. A list of returns displays based on the criteria you selected.

4. To access returns you have recently created or opened, click the **Recent Returns** accordion column on the right side of your screen. You can open any returns listed there.

Figure 11

2020 SUPPORTED ENVIRONMENTS

The information in this document is based on information available from Product Development and from Microsoft as of June 2020 and is subject to change. All changes will be posted to our Customer Center web site as they become known.

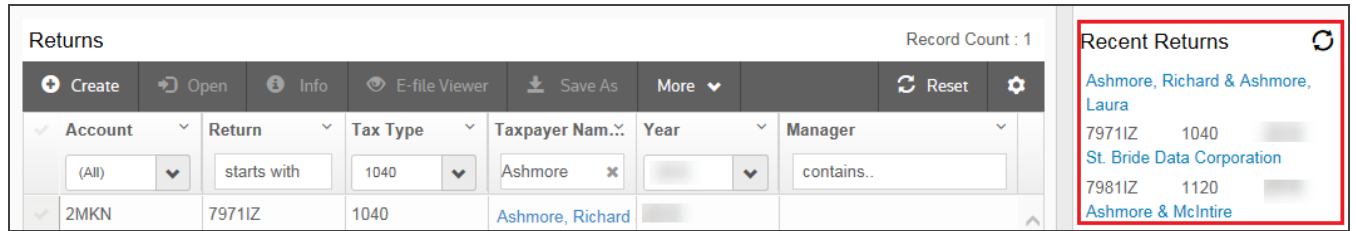Thomson Reuters provides minimum operating guidelines used to process tax returns. This document contains information to be used to plan your operating environments for the 2020 tax processing season, but this information is subject to change as third-party providers may change dates affecting retirement of items shown in this document.

We also recommend that you review the Microsoft Product Lifecycle Information found at **http://support.microsoft.com/select/?target=lifecycle**.

WORKSTATION

COMPONENT	CURRENT SUPPORT	NOTES
Processor	2 GHz AMD or Intel® processor	
Operating System	Windows 8.1 (32-bit and 64-bit) Windows 10 (32-bit and 64-bit)	We support 64-bit operating systems for Windows 8.1 for Tax Year 2007 and all subsequent years. Local machine administrator rights are required for the initial installation of each year's application.
Operating System Add-ons	.NET 4.6 Framework Microsoft Visual Studio 2012 C++ runtime and Visual Studio 2015 C++ runtime Microsoft Access database engine 2010	Missing prerequisites are automatically installed during installation. Full and complete .Net 4.6 or later must be installed on Windows 10 machines.
Memory	4 GB of RAM (minimum)	Additional memory, page file, and/or available free hard drive space will be necessary for processing large returns and reports. Depending on the level of chart detail, number of states, entities, partners, and so forth, several hundred MB of temporary free disk space may be required.

COMPONENT	CURRENT SUPPORT	NOTES
Internet Browser	Internet Explorer 10.0, 11.0 Chrome version 71.0.3578 or higher	The Compatibility view is no longer supported. Please remove *.fasttax.com from your list of sites. Under **Options > Preferences**, you can select how you would like returns opened (last selection). There are three selections: open in Chrome, open in Internet Explorer (default), or ask your preference. After the first open of a return, Chrome has been found to be faster in subsequent opens.
Display	1024 × 768 or higher-resolution monitor	

PRINTERS

PRINTERS	SUPPORTED DRIVERS	NOTES
HP Laser Printers	HP Universal Print Driver for Windows [PCL 5 or 6]	Consult manufacturer guidelines. Additional memory may be required to print large returns or reports.
Non-HP Laser Printers	Native PCL 6 Driver	Consult manufacturer guidelines. Additional memory may be required to print large returns or reports.

RS CONNECTIVITY

COMPONENT	REQUIREMENT
Internet Connectivity	Broadband connection required through: • Internet Service Provider (recommend Tier 1 provider) OR • Dedicated connection to our facility (requires registered Transaction Control Protocol/Internet Protocol (TCP/IP) addresses).
Firewall Requirements	Security policies, firewall rules, proxy rules, and router packet filters must allow outbound connections (and inbound replies) on destination ports 80 and 443 to the Class "B" network address 164.57.0.0. The source port selection uses standard port numbers 1024 and above.
Proxy Server Access	Proxy server access to the Web servers is supported. However, caching of page content is not supported and must be disabled. Proxy Server access to the application servers is supported ONLY in transparent mode. The proxy server must not translate the TCP/IP address of the application server. The client PC must be able to establish a connection using the actual TCP/IP address and port numbers of the application server with no application "awareness" of a proxy server.
Protocols	HTTP (TCP/IP port 80) and HTTPS (TCP/IP port 443) protocols are required.

TRUSTED SITES

For Internet Explorer users only

We recommend that you use the Trusted Sites Zone in Internet Explorer for Thomson Reuters's applications instead of the Internet Zone so that you do not remove useful security messages for other non-Thomson Reuters Internet sites.

The following sites should be marked as trusted sites:

- ***.fasttax.com**

- ***.ThomsonReuters.com**

- **www.riahelp.com**

If you have purchased e-Form RS, also add **eFormRS.com**.

TECHNICAL REQUIREMENTS AND SETUP

Please see *2020 Supported Environments (page 17)*.

CONNECTIVITY

You can select one of the following methods of connecting to :

- Internet connection

- dedicated connection to our facility.

In all cases, the user is responsible for the cost of establishing and maintaining connectivity.

Internet Connection

You can connect to directly through an Internet Service Provider (ISP). This includes access to the Internet from a workstation on your LAN, or using dial-up.

Dedicated Connection

You can connect to through a dedicated connection, which requires registered Transaction Control Protocol/Internet Protocol (TCP/IP) addresses. Contact your Account Representative to obtain additional information about establishing this type of connectivity.

Using a dedicated connection requires registered TCP/IP addresses when communicating with servers. Other requirements may be necessary to establish a dedicated connection.

Supported Internet Service Providers

You can connect to through any ISP, though we recommend that you use a reputable Tier 1 provider.

SECURITY

Firewall Information

The following information defines the requirements for TCP/IP communications from any client network to the Network. This information is specifically designed to help you set up security policies in your Firewall, Proxy Server, or router to allow communications from your client PCs to the Network. Connectivity between the client network and the Network is assumed to exist either through the Internet or through some other previously established connectivity.

Network Address

We use a registered Class "B" TCP/IP address of 164.57.0.0. exists within that address space. The architecture of uses a large number of Application Servers; the number of these servers can change at any time, as well as the TCP/IP addresses. Because of this architecture, the entire Class "B" address space must be used in any security policies, Firewall or Proxy Server rules, or router packet filters.

Routing within the client network must be configured to allow the client PCs using to access the Network. This may be done using standard "default" routing, or it may require specific routes to be set up within the client network. The client's network administrator will have to establish the appropriate routing to meet this requirement.

Web Servers

The Web servers use industry standard HTTP and Secure HTTP protocols. The requirements for communications with the Web servers are itemized below:

- DNS Name Resolution is not used for the Application Servers.

- Proxy server access to the Web servers is supported. However, caching of page content is not supported and must be disabled.

- Network Address Translation (NAT) is supported for both client addresses and Web server addresses.

- HTTP (TCP/IP port 80) and HTTPS (TCP/IP port 443) protocols are required.

- Connections are outbound only from the client to the server.

- Security policies, firewall rules, proxy rules, and router packet filters must allow outbound connections (and inbound replies) on destination ports 80 and 443 to the Class "B" network address 164.57.0.0. The source port selection uses standard port numbers 1024 and above.

- We require you to configure any security scanning appliance monitoring ports 80 and 443 so that it ignores traffic to the 164.57.0.0 subnet. The decompress-scan-recompress cycle introduces a significant delay into the communication network; this delay can cause communication timeouts that manifest themselves as Remote Server Error dialog boxes. Because traffic to the 164.57.0.0 subnet is encrypted, the web scanner appliance will never see a suspicious result.

Application Servers

The Application Servers use TCP/IP communications from the client PC to the Server. The requirements for communications with the Application Servers are itemized below:

- DNS Name Resolution is not used for the Application Servers.

- Proxy Server access to the application servers is supported ONLY in transparent mode. The proxy server must not translate the TCP/IP address of the application server. The client PC must be able to establish a connection using the actual TCP/IP address and port numbers of the application server with no application "awareness" of a proxy server.

- Network Address Translation (NAT) is supported for the client addresses but is NOT supported for the application server addresses.

- Connections are outbound only from the client to the server.

TRUSTED SITES

For Internet Explorer users only

We recommend that you use the Trusted Sites Zone for Thomson Reuters applications instead of the Internet Zone so that you do not remove useful security messages for other non-Thomson Reuters Internet sites.

If you are using Internet Explorer, please note that GoSystem Tax requires Internet Explorer (IE) version 10.0 or 11.0. To verify the version, click **About Internet Explorer** on the browser's Help menu and view the **Version** and **Update Versions**. Verify that page caching and security options are set as follows:

1. From the Internet browser toolbar, select **Tools > Internet Options**.

2. Click the **General** tab, and then, under **Browsing History**, click **Settings**.

3. Under **Check for newer version of stored pages**, select **Every time I visit the web page**.

4. Click the **Security** tab.

5. Click **Trusted Sites**, and then click **Sites**.

6. Clear the check box for Require server verification.

7. In the **Add this Web site to the zone** field, enter the following value and then click **Add**:

   - gosystemtaxrs.fasttax.com

   - *.ThomsonReuters.com

   - www.riahelp.com

   - If you have purchased e-Form RS, also add eFormRS.com.

8. Click **Close** to close the **Trusted Sites** dialog box.

9. Click **Custom Level**. Scroll down through the list of settings to find the **Miscellaneous** section.

10. Find the setting to **Display mixed content**, and then select **Enable**.

11. Click **OK** to close the **Security Settings** dialog box.

ENABLING POP-UPS

In order for milestone pop-ups to appear, you must enable pop-ups for the RS site, as follows:

For Internet Explorer users only

1. In the Internet Explorer application, select **Tools > Internet Options**.

2. Select the **Privacy** tab.

3. Go to the **Pop-up Blocker** section. If the box is not checked, you are finished. If it is checked, go to the next step.

4. Click the **Settings** button.

5. In the **Address of web site to allow** text box, enter *gosystemtaxrs.fasttax.com*.

6. Click **Add** The site is now added to allow pop-ups.

7. Click **Close**.

📝 *For Microsoft Edge users only*

1. In the Microsoft Edge application, select the three dots for **Settings and more** in the upper right of the browser application.

2. Select **Settings > Site permissions**.

3. Go to the **Pop-ups and redirects** section, and click the arrow to the right.

4. If **Block** is on (default), go to the next step.

5. To add a site to allow pop-ups, under **Allow**, click **Add**.

6. In the **Add a site** text box, enter *gosystemtaxrs.fasttax.com*.

7. Click **Add** The site is now added to allow pop-ups.

8. Close **Settings**.

📝 *For Google Chrome users only*

1. In the Google Chrome application, select the three vertical dots to **Customize and control Google Chrome** in the upper right of the browser application.

2. Select **Settings > Privacy and security**.

3. Go to the **Site settings** section, and click the arrow to the right.

4. Scroll down to the **Content** section, and click the arrow to the right of **Pop-ups and redirects**.

5. Turn **Block** to *Allowed*.

6. If you do not wish to globally allow pop-ups and redirects, go to the next step.

7. To add a site to allow pop-ups, under **Allow**, click **Add**.

8. In the **Add a site** text box, enter *gosystemtaxrs.fasttax.com*.

9. Click **Add** The site is now added to allow pop-ups.

10. Close **Settings**.

RESOURCES

The *Administrator's Guide* provides important information about Access Control including procedures for setting up groups, users, and assigning rights.