



How to Use GrandMaster Suite  
**Backup and Restore**



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## How to Use GrandMaster Suite - Payroll Backup and Restore

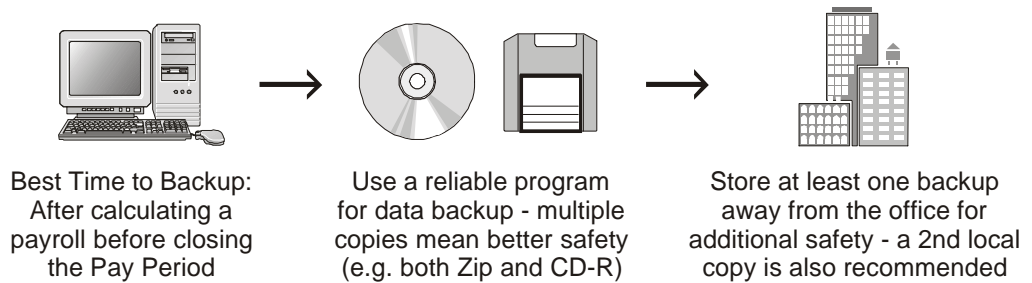
### Overview

Virtually every computer user will experience data loss due to a hard drive problem sometime in their life. As such, it makes good common sense to save copies of important data in case of computer failure. This process is commonly referred to as *backing up* the data.

Companies perform this process to protect their data in the event that the original copy of the data is lost or destroyed. "Backups" generally refer to a collection of data stored on non-volatile storage media for purposes of recovery in case the original copy of data is lost or becomes inaccessible.

Backups are usually performed on removable media that can be moved off-site. This copy is referred to as a *backup* copy. To be useful for recovery, a backup must be made by copying the source data image when it is in a consistent state -- in the case of payroll, after a payroll run is complete, as opposed to the middle of a pay run.

*Restoring* refers to the act of reestablishing your payroll data back to the point of usability, up to the time that the payroll was lost.



Many companies store their payroll data on a network drive that is backed up each evening. For easier accessibility, you may wish to keep a backup copy that is independent of the network backup.

#### Backup and Restore

You can use almost any media type to backup your GrandMaster Suite data (many companies backup to multiple types such as CD-R and Zip)

If you need to restore, you can use any media you wish as long as the backup files are present.



### How Often?

Frequent and regular payroll backups are essential for any recovery scheme. Many companies base their frequency of backups on the rate or frequency of changes to their payroll data. Along with routine payroll functions such as entering payroll hours and processing pay cheques, it can include such changes as insertions, updates, and deletions of various payroll items, the addition of new employees, etc.

If your payroll data is changed at a high rate, backup frequency should be proportionally high. Alternatively, if your payroll is updated only once every pay period, the payroll can be backed up less frequently.

## When should I Backup my Payroll?

- As important changes occur. For example, if you make a simple change (e.g. updating an employee's photo), you may not wish to perform a complete backup.
- When the computer that stores the payroll data is performing oddly. If you notice your computer beginning to halt unexpectedly or if it begins crashing often, it is a good idea to backup your payroll data -- a serious hardware failure may be imminent.
- During periods of low network access. If your payroll data exists on a network drive, try to schedule the backup during slow production periods to ensure a speedier process.
- When the payroll is complete and prior to the pay period is closed (the time when data corruption is likely to occur). Backups performed in the middle of a pay run will not serve you very well if you need to restore the files back to the last saved state (i.e. you will only have saved half of your previous pay run).

## How does it work in GrandMaster Suite?

GrandMaster Suite stores your payroll data in a series of subdirectories in the location where you install the program. These directories are created during the installation process. In order to safely backup your data at any given point in time, this specific set of directories must be backed up *as a complete set*.

This following set of subdirectories constitutes a complete backup set:

• ADMIN Directory	• ORGCHART Directory
• PAYROLL Directory and Sub Directories	• JOBCOST Directory
• HR Directory	• EFT Directory
• SCHEDULE Directory	• COMMON Directory
• TIMEKEEP Directory	

It is important to consider that these files may reside in alternate directories if you have specified such in the *Initialization File Settings* dialog box (in the *Administration Module*). GrandMaster Suite allows these files to be located anywhere on your local hard drives or network. As such, these files may exist in locations other than the payroll directory and its sub directories and should be specifically included in the backup.

With the exception of the `\gmsuite\runtime` directory (which contains the executable programs) these aforementioned directories *must* be backed up as a complete set and/or restored as a complete set.

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**Warning:** Data files must always be backed up **as a complete set**. Partial restoration of the data files will compromise the integrity of the system database. If the integrity of the database is not maintained you may find it necessary to re-enter all affected data.

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### Location is important

Many payroll professionals rely on the assistance of their network administrators for initial placement of their payroll data. If you store your payroll data on a network drive in this manner, we recommend that you be aware of the data's location (should you require it when a network person is not available).

### Other Files to Consider for Backup

Along with your company's payroll data directories (as outlined in the previous section), you may also have other files that are associated with your payroll. These can include employee photos, supporting documents for WCB claims, health or dental claim documents, etc. If these extra files are used for your payroll tasks, ensure that they are included in your backup set as well.

### Third-Party Backup Required

GrandMaster Suite does not provide a built-in backup utility program. It is recommended that you obtain and implement a reliable third-party backup system. This guide will suggest several methods, but ultimately, your choice should be based on the methods and frequency by which you will perform your backups.

## Creating a Backup Strategy

Before you create a payroll backup, you should decide how you plan to protect your payroll against potential failures. Following are several basic questions you can ask when developing your backup strategy:

- **Is it acceptable to lose any changes if a disk failure damages some of the payroll files?** If it is not acceptable to lose any data, the payroll should be backed up after performing any change, no matter how small. If it is acceptable to lose minor data changes (e.g. employee photo update, report logs, etc.), you can backup less frequently and redo the changes as required (assuming you have them written down for future reference).
- **Will you ever need to recover to arbitrary past points in time?** If you need to recover to a past point in time to correct a payroll change, you must ensure that all subsequent changes (i.e. changes that have occurred since the backup) are reapplied to the payroll. In some cases, it may be easier to use some of GrandMaster Suite's automated features to correct a past mistake (e.g. the *Pay Reversal* feature). Note: Recovery to a past point in time always requires that you have a complete payroll backup that reflects the desired payroll at a specific point in time.
- **Is the payroll data located on more than one computer?** If so, you will need to ensure that your backup scheme takes into account multiple data locations and that all required data is accounted for.

## Keep Older Backups

How long you should keep a payroll backup depends on the choices you want for payroll recovery. If you want to recover to a past time, you need a backup that was completed before that time. If disk space or storage is at a premium, you may only wish to store backups from a period of two months or earlier.

For added protection, consider keeping two or more backups (and all archive logs that go with these backups) previous to the current backup. Thus, if your most recent backups are not usable (for example, the tape drive or CDR used for backups becomes functional), you will not lose all of your data.

## Test Backup and Recovery Strategies

It is a good idea to verify your backup and recovery scheme in a test environment before settling on a given method. By doing so, you can test the thoroughness of your methods and minimize problems before they occur in a real situation.

Performing a complete recovery will ensure that your archiving, backup and recovery procedures work effectively. Many companies perform the recovery process at least twice a year. This helps them to stay familiar with recovery procedures, so they are less likely to make a mistake in a crisis.

## Working at the Payroll Level

Data backup and restore does not relate specifically to either the Payroll level or the Employee level. That is, you backup your data independently of the program.

## Common Backup Methods

The following lists some of the most popular methods of performing backup. Use the sections that follows to learn read basic information about each method.

- Floppy disks
- Tape Drives
- Iomega Zip Drives
- Flash Drives
- Recordable and Rewritable CD Media
- Network Backup
- Web-based Internet storage sites
- Backing Up to a Second or Removable Hard Drive

### Floppy Disks

Floppy disks should be used to backup only small amounts of data -- generally no more than a few megabytes. In most cases, GrandMaster Suite payrolls will exceed the practical capacity of a floppy disk. Additionally, if you backup a large amount of data onto floppies and just one floppy goes bad, then the entire backup set can be ruined.

### Tape Backups

Tape drive backups are a good backup medium for most small-to-medium-sized businesses. Some advantages of tape drive backups:

- **Large Capacity** - As hard drives increase in capacity, tape is an economical backup medium that is of a similar size and growing in capacity to match hard drive sizes.

- **Cost Effective** - It is inexpensive, both for the drives and on a per-gigabyte basis for the media. You can purchase a drive and enough media to perform proper, reliable backups of several gigabytes of data, for less than \$300.
- **Reliability** - Tape is a reasonably reliable backup medium, provided that the drive is maintained properly and the media are treated with care.
- **Simplicity and Universality** - There is good software support for tape drives today, and a number of software packages that will support a wide variety of devices. They are relatively simple to set up, even for novice users.
- **Unattended Operation** - You can conduct a completely unattended backup of a large payroll. Once the tape drive is set up, you can generally insert a tape, start the backup process and walk away from the computer and let the backup complete on its own.

Some users report that more expensive tape drive units seem to offer more reliability. Performance on less-expensive units may also be less than ideal in some cases, especially when random access is needed to access specific files on the tape. Higher-end tape drives, such as DLT, offer very good performance but are more expensive.

### Zip Drives

Zip drives are popular because of their relatively low cost and versatility. Not only can a Zip drive be used as a backup unit, but it can also be used as another hard drive. Unlike tape backup units, you can use a Zip drive as though it is another hard drive (e.g. install programs on it, open files and work with them, move, rename, delete, and copy files and folders, etc.). With a few minor exceptions, whatever you can do with a hard drive, you can do with a Zip drive.

Zip drives use special disks, called Zip Disks. These disks look like a floppy disk, but they are thicker and sturdier. Zip drives come in various storage capacities: 100 MB, 250 MB, and larger 750 MB versions.

You can also purchase external USB versions of these drives that are portable, convenient, and easy to install. Just plug them into any USB port and they should be ready to use.

### Flash Drives

Flash Drives (commonly referred to as key drives, thumb drives, jump drives, USB drives and pen drives) are small self-powered devices that connect to a computer directly through a USB port. The process is simple -- just specify the files or folder(s) you wish to backup, and then copy them to the flash drive unit. Since many flash drives come with a security feature, if you ever lose the flash drive, the data will not be accessible by anyone else.

Flash drives are supported on most public machines, although some flash drives require a user to install drivers before use. Flash drives can hold any type of data, including spreadsheets, jpeg, video, and text files.

Flash drives come with varying amounts of memory. You may purchase a flash drive that is approximately the size of a zip disk, or 256MB. Also, you have the option of purchasing several 128MB drives instead of a single 512MB drive.

### Recordable and Rewritable CD Media

Recordable and Rewritable CD's, known as CD-R and CD-RW, let you make your own CD-ROM disks, which you can use to store valuable data permanently, or to backup your hard drive. CD-R discs are sturdy, reliable, and extremely affordable.

One CD-R disk can hold up to 700 MB of data, and are very inexpensive. When purchased in bulk, CD-R disks can cost less than half a dollar. This makes it extremely easy, and highly cost-efficient to store or distribute large quantities of data. CD-R disks store data permanently -- you cannot erase data on them and record over them like you can with a Zip disk or floppy disk.

CD-RW disks, however, can be reused over and over -- as many as 1000 times or more. CD-RW cost a few dollars more than regular CD-R disks, but you can reuse them as often as you want. They hold either 530 or 650 MB of data, depending on the recording method you use.

The actual CD-R and CD-RW drives themselves are very affordable. A fast, high-quality unit can cost less than \$100.00. Many on-line computer hardware stores sell good-quality CD-R and CD-RW units for even less.

### **Network Backup**

For network PCs, backup over the network is a viable alternative to using removable drives. This method is commonly used in smaller to mid-size businesses as a way of protecting data without the expense of tape drives or removable storage. The idea is fairly simple: copy data from the PC to a network directory. This method assumes that the network data is being backed up using a reliable method, otherwise the PC backup would be lost if the network drive ever failed.

### **Web-based Storage Sites**

Some organizations wish to forego the task of buying, connecting, and supporting (and sometimes, repairing) a personal backup system and instead, subscribe to a web-based service. With these sites, you upload whatever files you want to store, and they are housed permanently on these sites.

Using one of these sites can be advantageous if you need to modify your payroll and from a remote site. If you need a file, and forgot to bring it with you on a floppy or some other form of backup, you can simply access your storage space via the web and retrieve it. You can also use the space to create a community pool where payroll files can be shared among several administrators.

A drawback that concerns some is the idea that a complete copy of your company's payroll data resides elsewhere in fully readable form. If this is a concern, you may wish to verify the policies and credentials of the web-based service you are considering.

### **Backing Up to a Second Hard Drive**

Another method that some companies use is to backup data to a second hard drive on the same computer. Although fast and efficient, this may not be the most advisable method. The purpose of backing up data is to protect your company against data loss, in the event of a computer or hard drive failure. If your computer fails, and your only backup is on a second hard drive, you will not be able to access the data. Furthermore, if your computer fails due to a lightning strike or power surge, then it's likely your second hard drive is damaged, along with everything else -- in such a case the data will probably be lost forever.

For valuable payroll data, backing up to external media such as tape, Zip disks, or CD-R/CD-RW is always the best suggestion. No matter what happens to your computer, you can always rely on the external backup as and restore it to a new computer if required.

## **Which Format?**

Ultimately, the media format you use should be based on several criteria:

- The overall size of your payroll, with considerations for size increases as your employee base grows

- Cost of the backup method (e.g. Expensive Tape Drives vs. Inexpensive CDRs)
- Ease of use (especially for more frequent backup requirements)

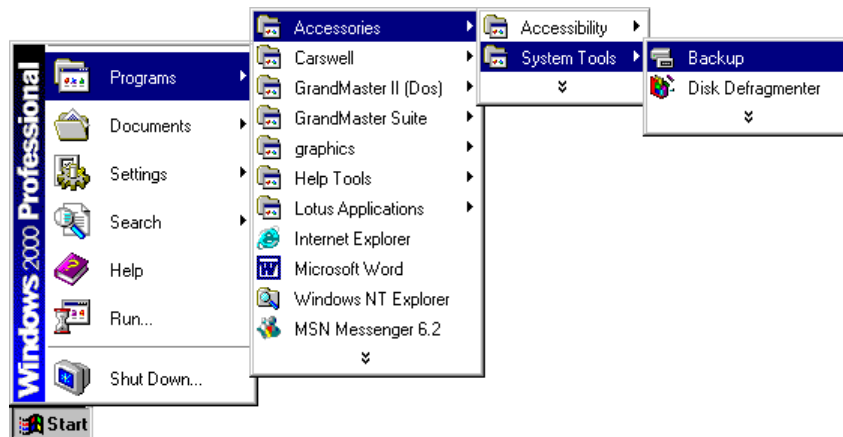
## A Sample Backup

This section describes a complete payroll backup using the utility that comes with Windows 2000. All versions of Windows include a backup utility and are quite reliable.

**Ease of Use:** Although Microsoft Backup is included as part of your Windows operating system, the simplest method is still one whereby you select a group of folders and drag them to and from your required media. Regardless of the program you use, the method is the same: backup the GrandMaster Suite data folders **as a complete set**.

### TO PERFORM A BACKUP USING MS BACKUP:

1. Run the Backup program by choosing the corresponding option from your operating system's *Accessories* menu.



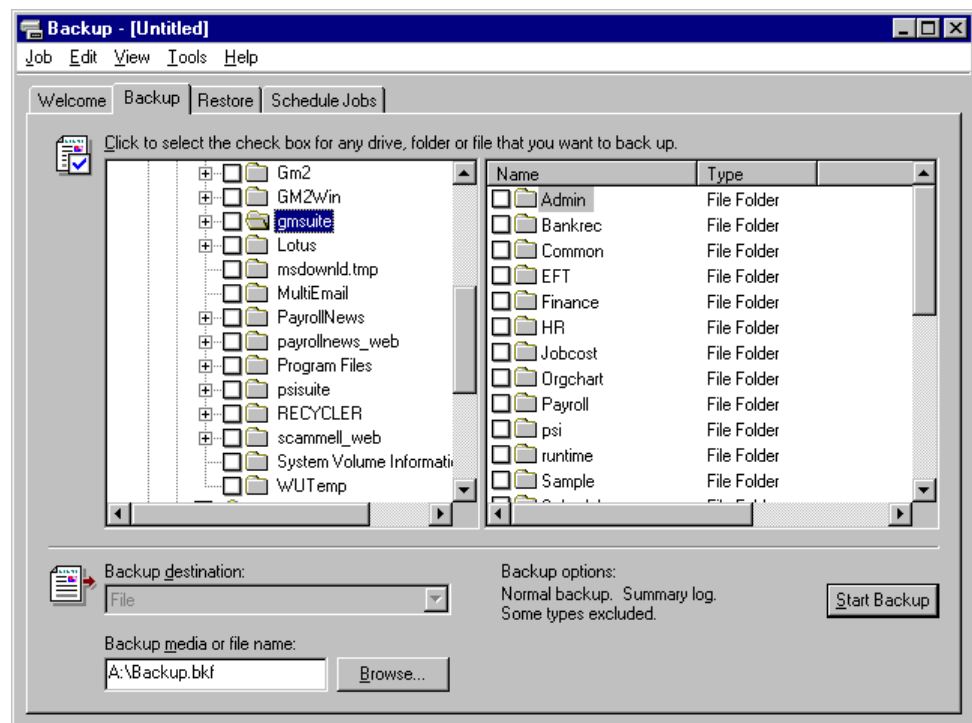
**Fig. 1**  
*Starting the Backup Program from Windows 2000*

The Microsoft Windows *Backup* dialog box appears.



**Fig. 2**  
*The Backup Dialog Box*

2. Choose the *Backup* tab and navigate to the location where you installed GrandMaster Suite. In our example, we installed the program in **d:\gmsuite**.

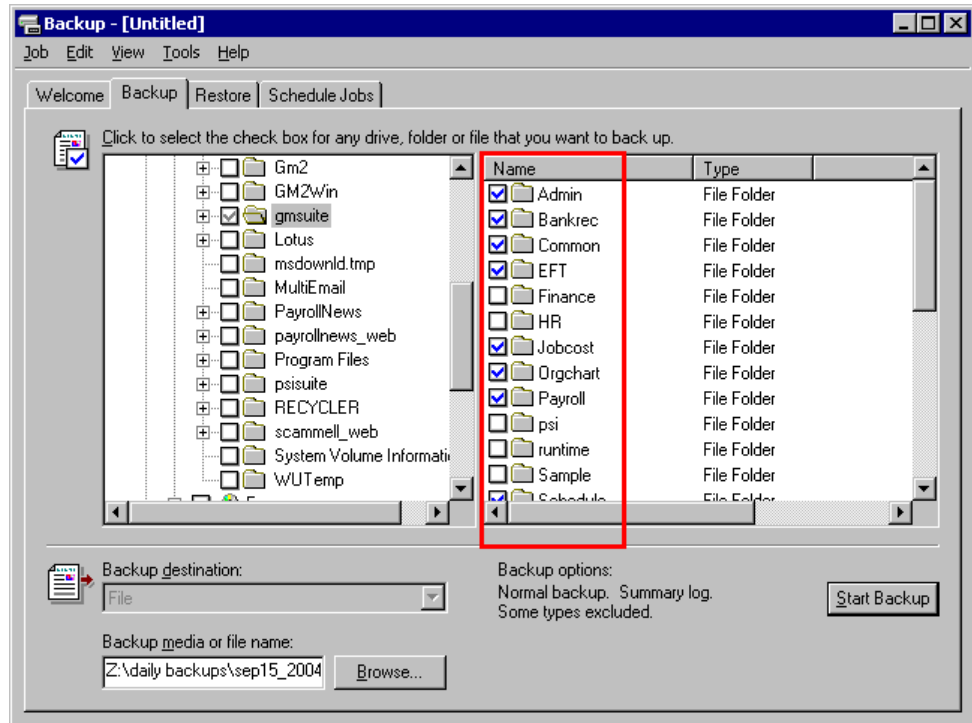


**Fig. 3**  
*The Programs Installation Folder*

3. Click on the program's root folder (**gmsuite** in our example) to display the program's subfolders in the right pane.

- Using the folders in the right pane, place a check in the box beside each folder you wish to include in the backup. As mentioned earlier, the folders to be include are: **admin, orgchart, payroll, jobcost, hr, eft, schedule, common** and **timekeep**.

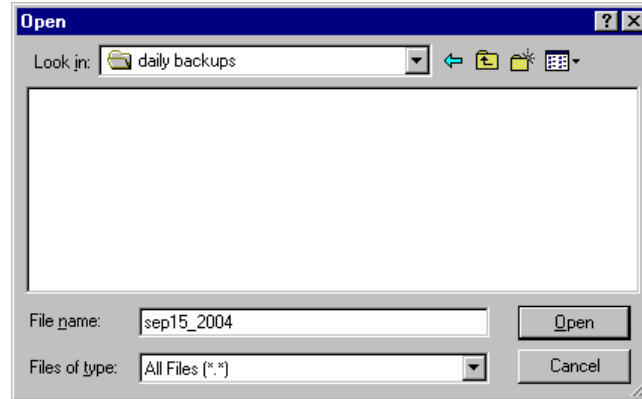
**Note:** The above folders are the **minimum requirements**. If you have data stored in other folders, you should select them at this time.



**Fig. 4**  
*The Selected Folder Set*

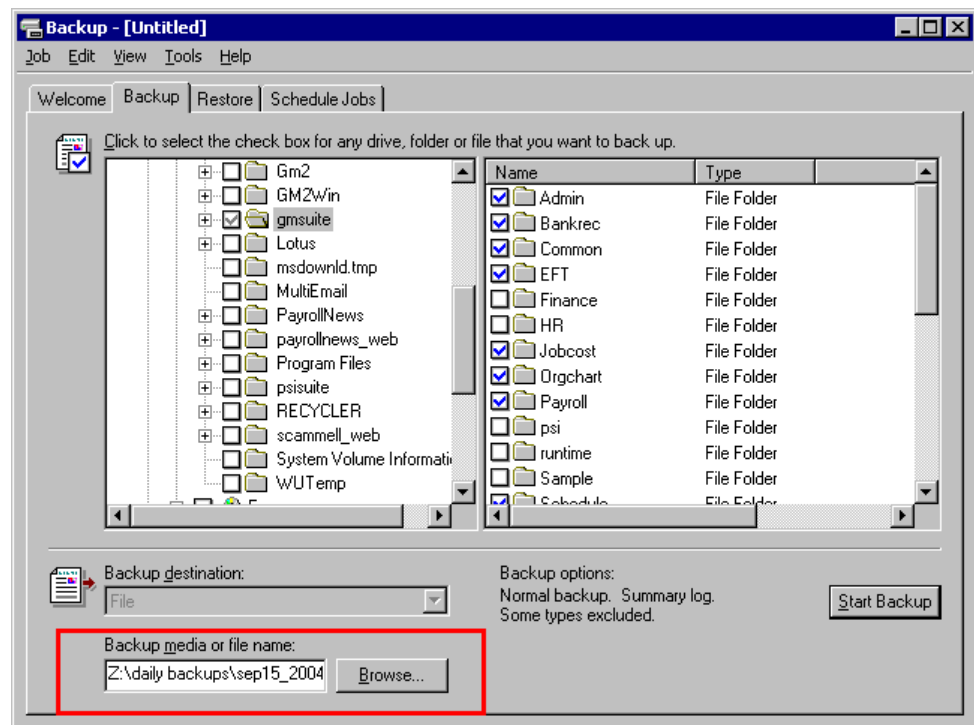
Now we need to define the location where the backup files will be stored along with the name of the backup file. In our example, we will be storing the backup on a network volume. This will ensure that the backup data will be stored in a safe manner since the network is backed up nightly.

- Choose the *Browse* button located to the right of the *Backup media or file name* field. This displays a dialog box that you can use to specify the file name and location.
- Navigate to the location where you wish to store the backup files. In our example, we will store the backup files on drive **F:** in the **\daily backups** folder.
- Enter a name for the backup file. In our case, we will name the file according to the date that it was backed up -- **sep15\_2004**.



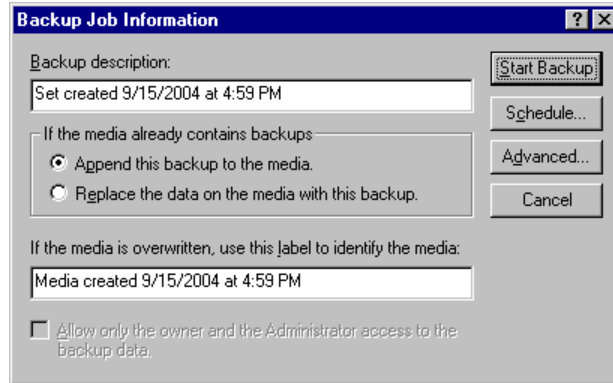
**Fig. 5**  
*The Backup File Name and Location*

8. Choose the *Open* button to close the dialog box and return to the *Backup* window. The full name and path is now displayed in the *Backup media or file name* field.



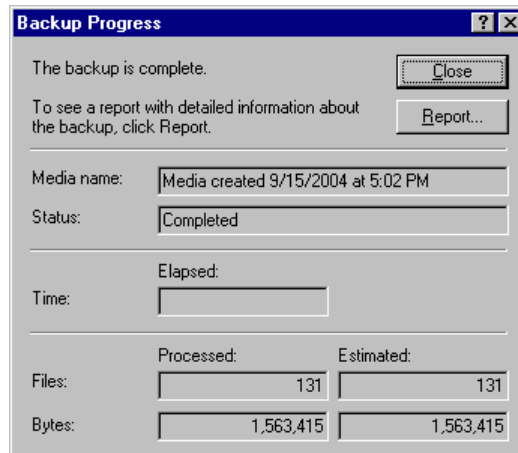
**Fig. 6**  
*The Backup File Name and Location is Specified*

9. Choose the *Start Backup* button to begin the procedure. This displays the *Backup Job Information* dialog box that allows you to set or change advanced backup options and backup information.



**Fig. 7**  
*The Backup Job Information Dialog Box*

10. Once your options are suitable, choose the *Start Backup* button. This displays a progress indicator as the files are copied. Once the backup is complete, the *Backup Progress* dialog box appears displaying backup results.



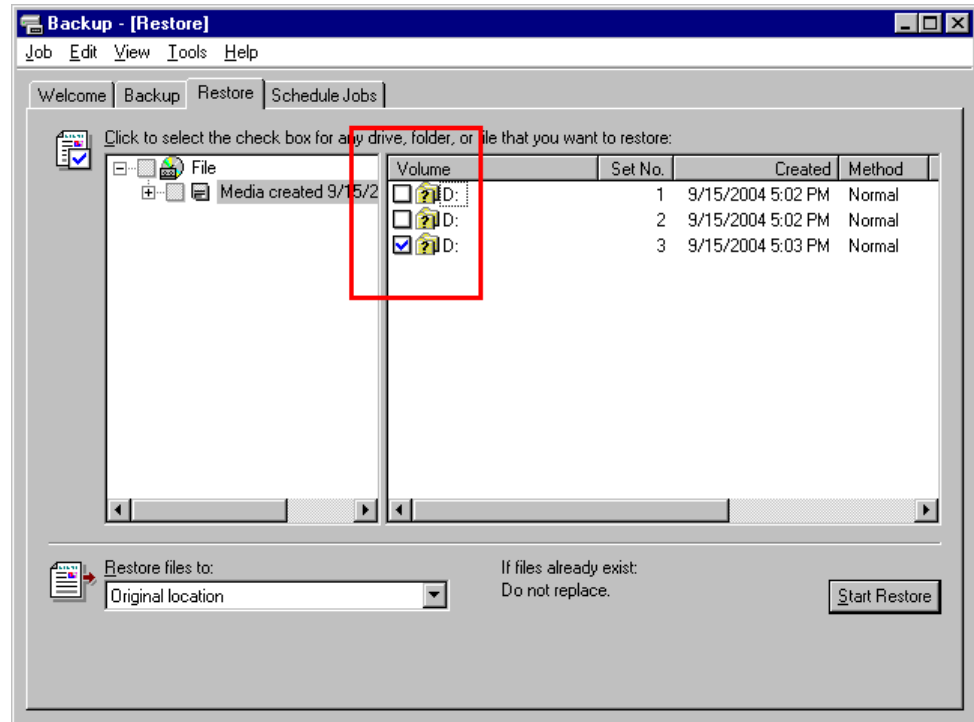
**Fig. 8**  
*A Successful Backup*

## A Sample Restore

This section describes how to restore a complete payroll backup using the MS Backup created in the previous section of this guide.

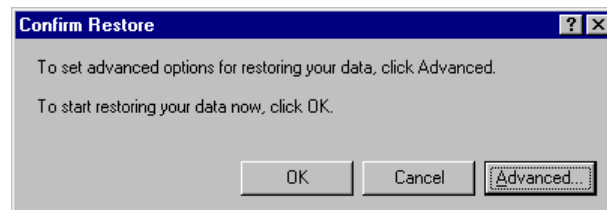
### TO PERFORM A RESTORE USING MS BACKUP:

1. Run the Backup program, choose the *Restore* tab, then click on the + sign from the backup media files shown in the left pane. This expands all backups that correspond to this media file and displays their names in the right pane of the tab.
2. Place a check in the box of the backup file set you wish to restore. In our example, we performed three backups and will be restoring the third set.



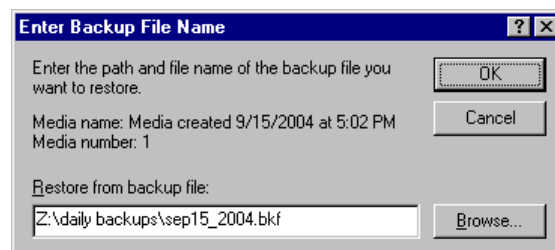
**Fig. 9**  
*The Third Set Ready to be Restored*

3. Choose the *Start Restore* button to begin the restore process. This displays the *Confirm Restore* message box that provides a final confirmation step.



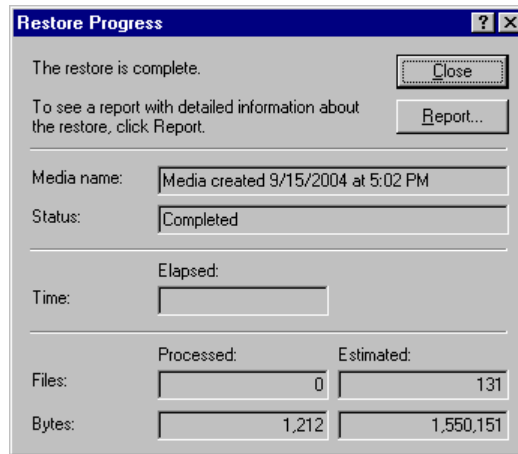
**Fig. 10**  
*The Confirm Restore Message*

4. Click *OK* to close the message box and the *Enter Backup File Name* dialog box appears. This dialog box allows you to specify the path and name of the backup file to be restored.
5. Use the *Browse* button to navigate to the backup file location, and then click *Open* once the file has been specified. This displays the full path and name of the backup file.



**Fig. 11**  
*The Enter Backup Name*

10. Once the backup file is specified, choose the *OK* button. This displays a progress indicator as the files are restored. Once the restore procedure is complete, the *Restore Progress* dialog box appears displaying the restore results.



**Fig. 12**  
*A Successful Restore*

## Frequently Asked Questions

### **Can I perform a backup on multiple backup devices?**

Yes. You can use as many devices as required for your backup scheme. Many companies choose to perform daily backups to a flash drive or zip disk because of the speed and simplicity. Weekly backups are more important and are generally written to CD-R, CD-RW. Monthly backups can also be written to CD or stored on tape for archival purposes.

### **After restoring my data correctly from a CDR, I receive errors when I attempt to access the payroll.**

If you have used a CDR for the backup media, the data is automatically written with the *Read Only* attribute applied. Once you restore your files, they will still be marked as Read Only until you explicitly remove the attribute. Remember to remove the Read Only attribute from all of the files in your restored folders.

### **Will I decrease my backup operation's time if I backup more often?**

It depends on your backup method. If your software supports incremental backups, then it may save you time if your payroll is very large. If your payroll is relatively small, it may be more efficient to simply backup the entire data file set to save time. Keep in mind that it may take less time to backup incrementally, but if you ever need to perform the restore process, you will take additional time as you will need to restore each incremental backup in succession.

In either case, it is important to remember that GrandMaster data files must always be stored as a complete set.

### **Can I use the Rebuild Utility to restore my payroll data?**

No. The Rebuild utility may be used to recover from certain file system errors by rebuilding your file system index but is not intended as a replacement for a traditional restore procedure. This utility should only be used under the supervision of a qualified CanPay Technical Support person. Running this utility incorrectly or without the proper preparation can result in permanent loss of your payroll data (after which a full restore may be necessary). We recommend that you always restore your backup files if you encounter a file error -- *the Rebuild utility is not a data recovery tool.*

### **Can I use the GrandMaster Suite Patch Program to backup my payroll data?**

No. One of the features of our patch is the automatic backup of your program files. Note that this auto-backup feature makes a copy of the GrandMaster Suite program files only -- *no payroll data files are included.* The patch program (included on our corporate website, ([www.canpay.com](http://www.canpay.com))) is much smaller than a full release and allows you to move from an older release to the current version in one simple step.