

How To Use GrandMaster Suite Backup and Restore



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411 Goulet Street
Winnipeg, Manitoba
R2H 3C7

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How to Use GrandMaster Suite - Payroll Backup and Restore

Overview

Due to the volatile nature of magnetic data, it is recommended that you make a periodic backup (copy) of your payroll data in case of computer or hard drive failure. This important step will protect your data in the event that the original copy of the data is lost, unreadable or destroyed.

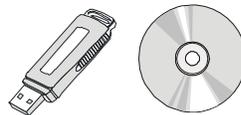
"Backups" generally refer to a collection of data stored on non-volatile storage media for purposes of recovery in case the original copy of data is lost or becomes inaccessible.

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 terms of payroll, this state is best achieved immediately after a payroll run is complete and closed, 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 data readability was interrupted.



Best Time to Backup:
Right after closing the payroll. The payroll is in a clean state and ready for a new sequence.



Use reliable media for data backup - multiple copies mean better safety (e.g. both USB and DVD).



Store your backup copy away from the office for optimal safety. Many businesses also store a second copy onsite for expediency.



Many companies store their payroll data on a network drive that is backed up daily. For easier accessibility, you may wish to maintain a second copy that is independent of your company's network backup.

Backup and Restore

You can use almost any media type to backup your GrandMaster Suite data (many companies use multiple formats such as DVD/CDR and USB drives)

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



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, backups may be useful right after you have made a large amount of changes, rate table changes, after the addition of new employees, or just before a software update.

If your payroll data is changed often, your 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, such as after a large amount of data changes, rate table changes, after the addition of new employees, or just before a software update. Conversely, if you make a simple change (e.g. updating an employee's photo), you may not wish to spend the time performing a complete backup.
- When the computer that stores the payroll data is performing oddly. If you notice your computer beginning to hesitate or perform in an unexpected manner, it is a good idea to backup your payroll data - this could be signs of an imminent hardware failure.
- 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.

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.

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 recommended that you be aware of the data's location (should you require it when a network technician 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. The following questions can be used 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 recorded 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 correct problems before they occur in a live situation.

Performing a complete recovery will ensure that your archive, 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 and to avoid mistakes that may occur 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.

- USB flash drive
- External hard drives
- Recordable and Rewritable DVD/CDR Media
- Web-based Internet storage sites
- Second local hard drive
- Network Backup

USB 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. Some flash drives contain a security feature that allows you add a password (to view the data) in the event that the flash drive is lost.

Flash drives are widely supported by all computers and can hold many data types, including spreadsheets, jpeg, video, and text files.

Flash drives come with varying sizes. When purchasing a flash drive, you should consider the size of your current payroll database and how it will grow over time. In today's standards, 8-12 GB drives are quite common and should provide adequate storage for several years.

External Hard Drives

Also referred to as "removable" hard drives, an external hard drive is a storage device located outside of a computer that is connected through a USB cable or wireless connection. An external hard drive is usually used to store media that a user needs to be portable, for backups, or for when the internal drive of the computer is already at its full memory capacity.

These devices have a high storage capacity compared to flash drives and are quite suitable for backing up payroll data. With portability, external hard drives are designed to be lightweight and can be carried anywhere. Some external devices also come with security features like fingerprint recognition, which prevents other people from gaining access to the stored data.

Recordable and Rewritable DVD/CDR Media

Recordable DVDs and CDRs allow you to store valuable data permanently. These discs are sturdy, reliable, and affordable.

DVD recordable discs can hold more than 4GB of data and are very inexpensive. When purchased in bulk, these disks can cost less than a dollar. This makes it extremely easy, and cost-efficient to store large quantities of data. DVD-R discs can be written once only, while DVD-RW can be overwritten many times.

Similarly, CD-R disk can hold up to 700 MB of data, and are also very inexpensive. CD-R discs can be written once only, while CD-RW can be overwritten many times.

Many of today's computers and laptops are equipped with DVD/CD drives that are able to record to both of these disc types.

Web-based Storage Sites

Some organizations wish to forego the task of purchasing and managing a personal backup system and instead, subscribe to a web-based service. With these sites, you upload whichever files you wish 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 to and from a remote site. If you need a file, and forgot to bring it with you on a USB drive, 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 review the security policies 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 without first removing the drive. Furthermore, if your computer fails due to a lightning strike or power surge, then it's likely your second hard drive may be damaged, along with everything else. In such a case the data will likely be irretrievable.

For valuable payroll data, backing up to external media such as USB drive, DVD, CD, or hard drive 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.

Network Backup

Data backup over the network is a viable alternative to using removable drives. This method is commonly used as a way of protecting data without the expense of tape drives or removable storage. The idea is straightforward: copy data from a local 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.

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. Inexpensive Flash Drives vs. Expensive Tape Drives)
- Ease of use (especially for more frequent backup requirements)

A Sample Backup

This section describes a complete payroll backup using the *File History* program that comes with Windows 7 and higher. All versions of Windows include a backup utility and are very reliable.

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

TO PERFORM A BACKUP USING THE WINDOWS FILE HISTORY PROGRAM:

1. Run the *File History* program by choosing the corresponding option from your operating system's *Start* menu or from the *Control Panel*. For example, Windows 10 displays the program when you open the *Start Menu* and type the words ***File History***.

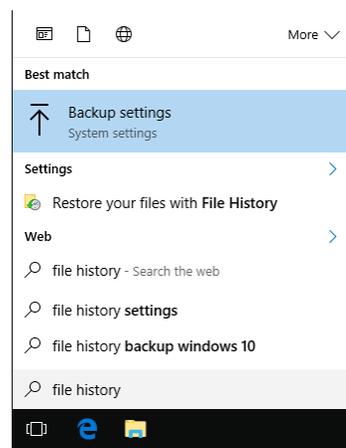


Fig. 01

Starting the Backup Program from Windows 10

- When the *File History* dialog box appears, select the *Add a Drive* button and then choose the desired backup drive from the list of available options. **Note:** If you do not have an applicable drive attached to your computer, you will not be able to use this program. In our example, we will choose the *External Hard Drive (E:)* option.

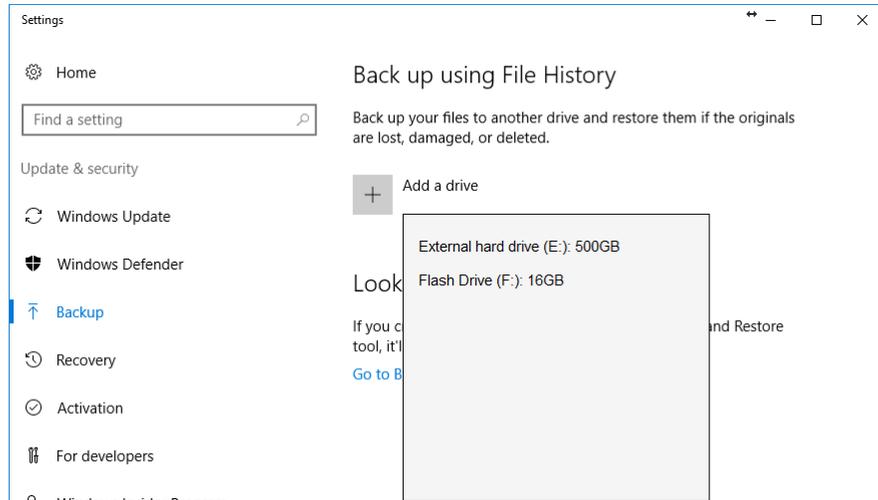


Fig. 02
The Programs Installation Folder

- Once you have selected a backup drive, select the *More Options* link. This opens the *Backup Options* dialog box where you can specify the files that will be included in the backup set.
- Choose the *Add Folder* icon at the bottom left side of the window, and when the *Select Folder* dialog box appears, navigate to the location where you installed GrandMaster Suite. In our example, we installed the program in **c:\gmsuite**.

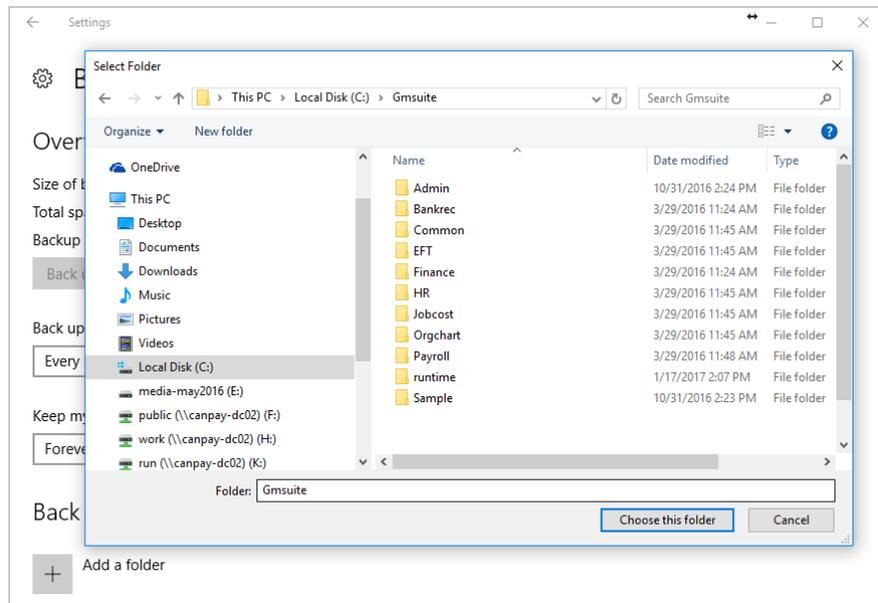


Fig. 03
The Program's Installation Folder

5. Click on the *Bankrec* folder, and then select the *Choose this Folder* button. This adds the *Admin* folder to the left side of the window under the "Back up these folders" section.
6. Repeat the preceding step, adding the following nine folders: **common**, **eft**, **finance**, **hr**, **jobcost**, **orgchart**, **payroll**, **schedule** and **timekeep**.

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

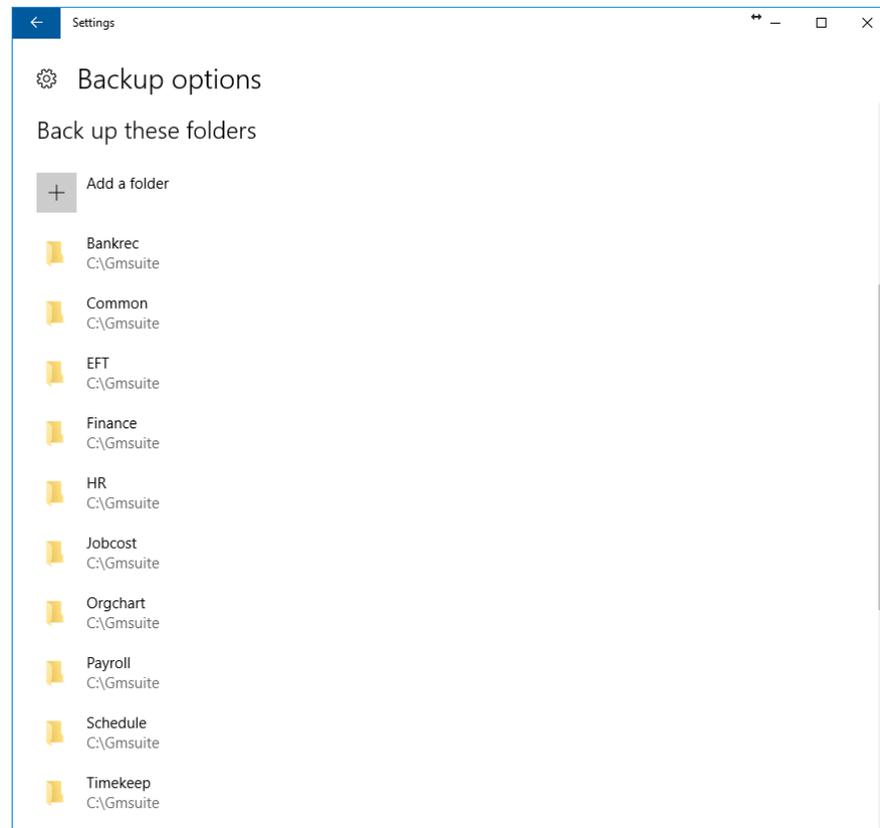


Fig. 04
The 10 Required Backup Folders

Note: You may notice that a number of other files and folders that are set to be backup up by default. You can remove these from the backup set easily by selecting the redundant folder, and then choosing the *Remove* button for each.

Now we need to define the frequency at which the files will be backed up.

7. Select the *Back up my files* option, and then choose the frequency at which the selected folders will be backed up. In our example, we have chosen to backup our files on a *Daily* basis.

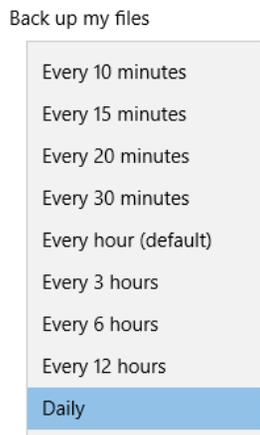


Fig. 05
A Daily Backup Frequency is Defined

With the backup drive and folders now assigned, the backup settings are complete. The assigned folders will now be backup up automatically with no further work required.

Notice also that a *Back up now* button also appears. This is useful if you wish to backup your files immediately, as opposed to waiting for the scheduled procedure. Let's use this option to perform a backup right now.

8. Choose the *Backup up now* button and the program will begin backing up the assigned folders immediately.

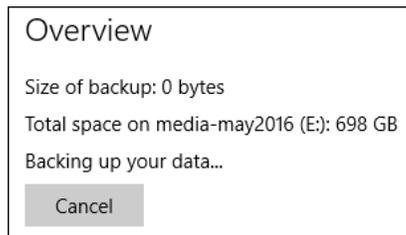


Fig. 06
A Back in Progress

Once the backup is complete, the dialog box will display the backup size along with the date of the backup.

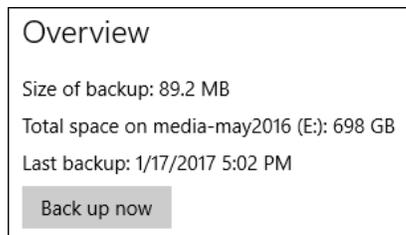


Fig. 07
The Backup Results

This completes the backup procedure.

A Sample Restore

This section describes how to restore a payroll backup that was created in the previous section of this guide. As discussed earlier, we will use the *File History* tool that is included with Windows 10 (and earlier versions of Windows).

Unclose vs. Restore: It should be mentioned that GrandMaster Suite provides an **Unclose** utility that will allow you to re-open the most recently closed payroll. This can be useful if you have closed a pay run then subsequently discovered that further changes or errors need to be adjusted, especially in cases where another type of pay run is not necessary. This can negate the need for you having to create an Additional Pay, an Extra Pay, or a Reversal pay to correct the error.

Un-closing a pay run reverts to the payroll's pre-closed state so that you can affect the changes, and then re-calculate and re-close the pay sequence. Un-closing will also restore the pay run's original Sequence Number so that your run numbers remain unaffected.

The un-close procedure should only be carried out on a recent payroll, and where there has been no data entry for the subsequent run. This utility should also be run only in conjunction with a CanPay payroll representative.

TO PERFORM A RESTORE USING THE WINDOWS FILE HISTORY PROGRAM:

1. Run the *File History* program by choosing the corresponding option from your operating system's *Start* menu or from the *Control Panel*. For example, Windows 10 displays the program when you open the *Start Menu* and type the words **File History**.
2. When the *File History* dialog box appears, scroll to the bottom of the window and choose the *Restore files from a current backup option*. This opens the *File History* window that includes a list of backups that have been made using the program.
3. Using the options in the window, select the desired backup that corresponds to set of files that you wish to restore.

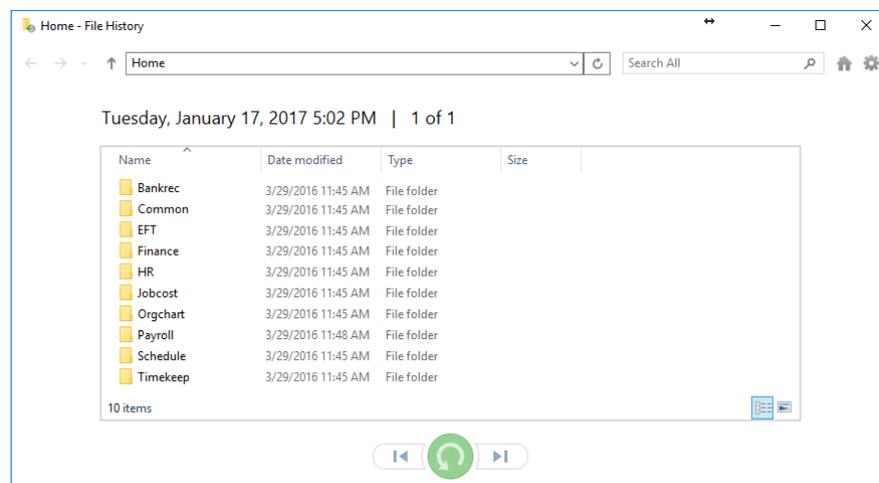


Fig. 08
Choosing a Set of Files to Restore

4. Choose the *Restore* button (the Green circular arrow) to begin the restore process. This displays the *Confirm Folder Replace* message box that provides a final confirmation step.

The top of the dialog box will read "This destination already contains a folder named "Bankrec" (or another payroll data folder you have assigned). This is a normal occurrence and you can safely proceed by choosing the *Yes* button.

5. To avoid having the same prompt appear for all subsequent folders, place a check in the *Do this for all current items* checkbox, and then choose *Yes* to continue.

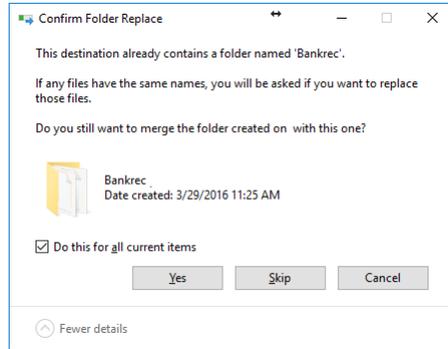


Fig. 09
The *Confirm Folder Replace* dialog box with checkmark activated.

4. When the restore process continues, the program will display a message asking you what to do with the backup files. You have the option of replacing the files (i.e overwriting the current set with your backed-up versions), skipping the files altogether, or deciding on a file-by-file basis.

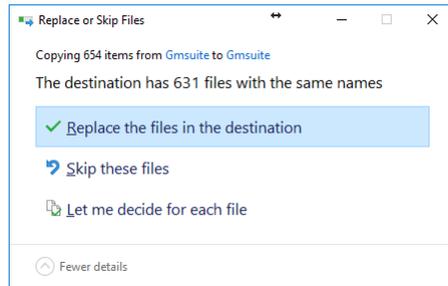


Fig. 11
The *Replace or Skip Files Prompt*

10. Choose the *Replace the files in the destination* option to proceed with the restore operation. This displays a progress indicator as the files are restored.

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) is much smaller than a full release and allows you to move from an older release to the current version in one simple step.