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# BACKING UP DATA FROM VIRTUAL OFFICE CS OR SAAS APPLICATIONS

<i>Accounting CS</i> .....	1
<i>Client Bookkeeping Solution</i> .....	1
<i>Creative Solutions Accounting</i> .....	2
<i>FileCabinet CS</i> .....	3
<i>Financial Analysis CS</i> .....	5
<i>Fixed Assets CS</i> .....	5
<i>Microsoft Outlook</i> .....	6
<i>Microsoft Excel, OneNote, PowerPoint, Publisher, and Word</i> .....	7
<i>Planner CS</i> .....	8
<i>PPC SMART</i> .....	8
<i>Practice CS</i> .....	9
<i>ToolBox CS</i> .....	9
<i>UltraTax CS</i> .....	9
<i>Workpapers CS</i> .....	11

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## Accounting CS

To obtain a copy of your Accounting CS™ SQL database, contact support by calling 800.968.0600 and following the prompts for Web Services.

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## Client Bookkeeping Solution

Follow these steps to back up data from Virtual Office CS® or SaaS Client Bookkeeping Solution® to your local hard drive.

1. Create a folder on your local hard drive named CBSbackups.
  - a. Double-click the My Computer icon.
  - b. Double-click the C:\ drive.
  - c. Choose File > New > Folder.
  - d. Name the folder CBSbackups.
2. Open Client Bookkeeping Solution in the Virtual Office CS or SaaS environment.
3. Change your backup location to the V:\CBSbackups folder.
4. Back up each Client Bookkeeping Solution company database.
  - a. Open the company database.

- b. Choose File > Backup > Database.
  - c. Click the Save button.
  - d. Repeat steps a – c for each company database.
5. Back up accounts receivable and check layouts.
  - a. Choose File > Backup > Layouts.
  - b. Click the Save button.
6. Close Client Bookkeeping Solution in the Virtual Office CS or SaaS environment.
7. If your firm uses custom logos and is licensed for Microsoft Office applications in the Virtual Office CS or SaaS environment, back up the custom logos.

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**Note:** If your firm uses custom logos but isn't licensed for Microsoft Office applications, a Support representative can retrieve these items for you. To contact support, call 800.968.0600 and follow the prompts for Web Services.

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- a. Open Word through Virtual Office CS or SaaS.
- b. In Word, choose File > Open.
- c. In the pane on the left, expand Computer, expand the Y drive (which is last in the list), and navigate to the folder in which your firm stores custom logos.

**Tip:** Firms often store custom logos in Y:\CBS\Layouts, but your firm may have chosen to store them in a different folder.
- d. Select the logos and press CTRL+C to copy them.
- e. Navigate to the CBSbackups folder on your hard drive and press CTRL+V to paste the files.
- f. Click Cancel to close the Open dialog in Word and then close Word.

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## Creative Solutions Accounting

Follow these steps to back up data from Virtual Office CS or SaaS Creative Solutions Accounting™ (CSA) to your local hard drive.

1. Create a folder on your local hard drive named CSAbackups.
  - a. Double-click the My Computer icon.
  - b. Double-click the C:\ drive.
  - c. Choose File > New > Folder.
  - d. Name the folder CSAbackups.
2. Open CSA in the Virtual Office CS or SaaS environment.
3. Back up client data.
  - a. In Creative Solutions Accounting, choose File > Backup.

- b. Choose **Clients** from the first field in the Backup dialog.
  - c. Double-click one or more of the clients listed in the left (Available) pane to move them to the right (Selected) pane, or click the Select All button.
  - d. Click the Change Backup Location button, navigate to V:\CSAbackups, and click OK.
  - e. Click the Backup button.
4. Back up global data (applicable to all clients).
    - a. Choose File > Backup.
    - b. Choose **System Data** from the first field in the Backup dialog.
    - c. Click the Select All button to move all global data items to the selected pane.
    - d. Verify that V:\CSAbackups appears in the **Backup location** field.
    - e. Click the Backup button.
  5. Close CSA in the Virtual Office CS or SaaS environment.
  6. If your firm uses custom stamps in Engagement CS and is licensed for Microsoft Office applications in the Virtual Office CS or SaaS environment, back up the custom stamps.

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**Note:** If your firm uses custom stamps but isn't licensed for Microsoft Office applications, a Support representative can retrieve these items for you. To contact support, call 800.968.0600 and follow the prompts for Web Services.

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- a. Open Word through Virtual Office CS or SaaS.
- b. In Word, choose File > Open.
- c. In the pane on the left, expand Computer, expand the Y drive (which is last in the list), and navigate to the folder in which your firm stores custom stamps.

**Tip:** Firms often store custom stamps in Y:\OfficeDocs or Y:\CSASys\Layouts, but your firm may have chosen to store them in a different folder.
- d. Select the stamps and press CTRL+C to copy them.
- e. Navigate to the CSAbackups folder on your hard drive and press CTRL+V to paste the files.
- f. Click Cancel to close the Open dialog in Word and then close Word.

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## FileCabinet CS

Follow these steps to back up data from Virtual Office CS or SaaS FileCabinet CS<sup>®</sup> to your local hard drive.

1. Create a folder on your local hard drive named FCSbackups.
  - a. Double-click the My Computer icon.
  - b. Double-click the C:\ drive.
  - c. Choose File > New > Folder.

- d. Name the folder FCSbackups.
2. Open FileCabinet CS in the Virtual Office CS or SaaS environment.
3. Back up drawer data.
  - a. In FileCabinet CS, choose File > Backup.
  - b. Double-click a drawer or drawers to move them to the right (Selected) pane, or click the Select All button.
  - c. In the Backup data group box, click the Modify Backup Location button, navigate to V:\FCSbackups, and click OK.
4. **Optional:** Back up FileCabinet CS system settings (annotations from the Stamp Library and the NetClient CS folder list).
  - a. Choose File > Backup.
  - b. Choose System Settings from the drop-down list in the upper-left corner of the Restore dialog.
  - c. Double-click Annotation Stamp Library and NetClient CS folders to move them to the Selected pane.

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**Important!** Do not back up Data Locations or Misc System Settings. These items contain configurations that are specific to the Virtual Office CS or SaaS environment and will conflict with local installations of FileCabinet CS.

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- d. Click the Backup button.
5. If you've been backing up data for other CS Professional Suite applications to FileCabinet CS, back up those archives.
  - a. In FileCabinet CS, choose Setup > System Configuration, click the Archive tab, and write down the location that appears in the **Fixed media (i.e. network drive)** field.
  - b. Return to the Applications screen in NetStaff CS, and open any Microsoft® Office application.

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**Note:** You can back up archived data through Microsoft Outlook® only if you have configured Outlook to receive mail.

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- c. In the Office application, choose File > Open.
- d. In the left pane of the Open dialog, navigate to the location you wrote down in step a.

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**Note:** The default archive location is on the Y drive, which is the last drive listed under Computer. The Y drive begins with "wincsi" and the drive letter appears at the end of the drive name.

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- e. Press CTRL+A on your keyboard to select all of the archives.

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**Tip:** You can select individual files by pressing and holding the CTRL key while clicking individual files.

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- f. Press CTRL+C to copy the items.
- g. In the navigation pane, click My Local Drive and navigate to the FCSbackups folder.
- h. Press CTRL+P to paste the archived data to the FCSbackups folder.

- i. Click Cancel to close the Open dialog.
  - j. Close the Microsoft application.
6. Close FileCabinet CS in the Virtual Office CS or SaaS environment.

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## Financial Analysis CS

To obtain a copy of your Financial Analysis CS<sup>®</sup> SQL database, contact support by calling 800.968.0600 and following the prompts for Web Services.

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## Fixed Assets CS

Follow these steps to back up data from Virtual Office CS or SaaS Fixed Assets CS<sup>®</sup> to your local hard drive.

1. Create a folder on your local hard drive named FBackups.
  - a. Double-click the My Computer icon.
  - b. Double-click the C:\ drive.
  - c. Choose File > New > Folder.
  - d. Name the folder FBackups.
2. Open Fixed Assets CS in the Virtual Office CS or SaaS environment.
3. Back up client data.
  - a. Choose File > Backup.
  - b. Verify that **Clients** is selected in the first field in the Backup dialog.
  - c. Double-click one or more clients in the left (Available) pane to move them to the right (Selected) pane, or click the Select All button.

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**Note:** The open client (if any) is automatically listed in the Selected pane.

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- d. Click the Modify Backup Location button, navigate to V:\FBackups, and click OK.
- e. Click the Backup button.
4. Back up Fixed Assets CS custom methods of depreciation.
  - a. Choose File > Backup.
  - b. Choose **Custom Methods** from the first field in the Backup dialog.
  - c. Click the Select All button to move the custom methods of depreciation to the selected pane.
  - d. Verify that V:\FBackups appears in the **Backup location** field.
  - e. Click the Backup button.

5. Back up Fixed Assets CS custom reports.
  - a. Choose File > Backup.
  - b. Choose **Custom Reports** from the first field in the Backup dialog.
  - c. Click the Select All button to move the custom reports to the Selected pane.
  - d. Verify that V:\FAbackups appears in the Backup location field.
  - e. Click the Backup button.
6. Close Fixed Assets CS in the Virtual Office CS or SaaS environment.

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## Microsoft Outlook

Follow these steps to back up data from Virtual Office CS or SaaS Microsoft Outlook 2016 to your local hard drive.

1. Create a folder on your local hard drive named <YourName>OutlookBackup.
  - a. Double-click the My Computer icon.
  - b. Double-click the C:\ drive.
  - c. Choose File > New > Folder.
  - d. Name the folder <YourName>OutlookBackup.
2. Open Outlook 2016 in the Virtual Office CS or SaaS environment.
3. Choose File > Open > Import.
4. Choose Export to a File and click Next.
5. In the Create a file of type list, highlight Outlook Data File (.pst) and click Next.
6. In the Select the folder to export from list, highlight the Outlook folder that contains the data you want to export.

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**Note:** If you select the top-level folder, Outlook will export all mail and contacts.

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7. Verify that the **Include subfolders** checkbox is marked, and click Next.
8. Click the Browse button and navigate to the V:\<YourName>Outlookbackup folder, which you created in step 1.
9. Enter **Outlook PST backup** in the **File name** field and click OK.
10. Click Finish.
11. The Create Outlook Data File dialog opens. If desired, enter a password for the PST file and then click OK. If you do not want to password protect the PST file, leave the fields blank and click OK.
12. Depending on the size of the PST file, it may take several minutes for Outlook to create the export file.

13. To export additional PST files or contacts, repeat steps 3 – 11 of this procedure. In step 9, be sure to enter a unique name for the export file.
14. Close Microsoft Outlook in the Virtual Office CS or SaaS environment.

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## Microsoft Excel, OneNote, PowerPoint, Publisher, and Word

Follow these steps to back up data from Virtual Office CS or SaaS Microsoft Excel,<sup>®</sup> OneNote,<sup>®</sup> PowerPoint,<sup>®</sup> Publisher, or Word to your local hard drive.

1. In the NetStaff CS tab of the navigation pane, click the **Applications** link.
2. Click the icon for the Office application from which you will back up data.
3. In the Office application, click the File tab in the ribbon and choose Open.
4. In the navigation pane on the left side of the Open dialog, expand Computer and navigate to the location in which your firm stores Office documents.

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**Tip:** Firms often store Office documents in the Y:\OfficeDocs folder, but your firm may have chosen to store them in a different folder.

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5. Navigate to the folder that contains the files that you will migrate to your local workstation.
6. Press CTRL+A on your keyboard to select all of the files within the folder.

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**Note:** You can also hold down the CTRL key and click individual files to select them.

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7. Press CTRL+C to copy the files.
8. In the navigation pane on the left side of the Open dialog, navigate to your local drive using one of the following methods.
  - Click My Local Drive.
  - Expand Computer and then expand C\$ on Client (V:), which is your local C:\ drive.
9. Navigate to the location in which you will store the files on your local computer.
10. Press CTRL+V to paste the files to the new location.
11. Repeat steps 4 – 10 until you've moved all of the appropriate files.
12. When you're done, click Cancel to close the Open dialog.
13. Close the Microsoft program in the Virtual Office CS or SaaS environment.

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## Planner CS

Follow these steps to back up data from Virtual Office CS or SaaS Planner CS® to your local hard drive.

1. Create a folder on your local hard drive named UTPbackups.
  - a. Double-click the My Computer icon.
  - b. Double-click the C:\ drive.
  - c. Choose File > New > Folder.
  - d. Name the folder UTPbackups.
2. Open Planner CS in the Virtual Office CS or SaaS environment.
3. Back up data.
  - a. Choose File > Backup.
  - b. Use the tabs in the Backup / Check Out dialog to back up client plans, report sets, custom reports, watch window templates, report layouts, graphs, or letter templates as needed. In each tab, highlight the item you want to back up and click the Select button, or click the Select All button.
  - c. When you are done selecting items to back up, click the Done button to open the Backup To dialog.
  - d. In the Backup To dialog, navigate to V:\UTPbackups and click Save.
4. Close Planner CS in the Virtual Office CS or SaaS environment.

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## PPC SMART

Follow these steps to back up data from Virtual Office CS or SaaS PPC SMART to your local hard drive.

1. Create a folder on your local hard drive named PPCbackups.
  - a. Double-click the My Computer icon.
  - b. Double-click the C:\ drive.
  - c. Choose File > New > Folder.
  - d. Name the folder PPCbackups.
2. Open PPC SMART in the Virtual Office CS or SaaS environment.
3. Choose File > Tools > Transfer Engagement.
4. In the Transfer Engagement Wizard, select the database and client name for the engagement.
5. Select the name of the engagement that you want to transfer.
6. Click Next.



7. Enter a name for the engagement transfer file.
8. **Optional:** To transfer a read-only engagement that staff members will not be able to edit, mark the **Read-Only** checkbox.
9. Click the Browse button and navigate to V:\PPCbackups.
10. Click Finish.
11. Repeat steps 2 – 10 to create transfer files for other PPC SMART applications.
12. Close the PPC SMART program in the Virtual Office CS or SaaS environment.

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## Practice CS

To obtain a copy of your Practice CS<sup>®</sup> SQL database, contact support by calling 800.968.0600 and following the prompts for Web Services.

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## ToolBox CS

To obtain a copy of your ToolBox CS<sup>®</sup> data, contact support by calling 800.968.0600 and following the prompts for Web Services.

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## UltraTax CS

**Important information for SaaS users!** Read the [UltraTax CS with PRP licensing: Moving from SaaS to a local or a network installation](#) topic.

Follow these steps to back up data from Virtual Office CS or SaaS UltraTax CS<sup>®</sup> to your local hard drive.

1. For each tax year for which you will back up UltraTax CS client data, create a folder on your local hard drive named UTYbackups (where YY is the tax year).
  - a. Double-click the My Computer icon.
  - b. Double-click the C:\ drive.
  - c. Choose File > New > Folder.
  - d. Name the folder UTYbackups, where YY is the tax year.
2. Open UltraTax CS in the Virtual Office CS or SaaS environment.
3. Back up client data.
  - a. Choose File > Backup.
  - b. Verify that Clients is selected in the first field in the Backup dialog.
  - c. Double-click one or more clients in the left (Available) pane to move to the right (Selected) pane, or click the Select All button.

- d. In the Backup data group box, click the Modify Backup Location button, navigate to V:\UTYYbackups, and click OK.
  - e. Click the Backup button.
  - f. Click the Done button.
4. Back up document data (applicable to all clients).
    - a. Choose File > Backup.
    - b. Select Documents from the first field in the Backup dialog.
    - c. Double-click documents to move them to the selected pane, or click the Select All button.

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**Important!** If you are backing up documents in UltraTax CS 2006 or earlier and you clicked Select All, be sure to highlight UltraTax CS Data Locations in the selected pane and click the Remove button to move it to the Available pane. If you back up data locations from the Virtual Office CS or SaaS environment and restore them to your local installation, the data locations will be incorrect in the local environment.

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- d. Verify that V:\UTYYbackups appears in the **Backup location** field.
  - e. Click the Backup button.
  - f. Click the Done button.
5. Back up system settings data (applicable to all clients).
    - a. Choose File > Backup
    - b. Select System Settings from the first field in the Backup dialog.
    - c. Double-click each item to move it to the selected pane, or click the Select All button.

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**Important!** Do not back up the UltraTax CS Data Locations item or the System Settings item under System Settings. If you clicked Select All, be sure to highlight UltraTax CS Data Locations and System Settings in the right-hand pane and click the Remove button to move them back to the Available pane.

If you back up data locations from the Virtual Office CS or SaaS environment and restore them to your local installation, the data locations will be incorrect in the local environment. If you back up System Settings, security settings included in that data can cause problems accessing the application.

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- d. Verify that V:\UTYYbackups appears in the **Backup location** field.
  - e. Click the Backup button.
  - f. Click the Done button.
6. Back up product settings data (applicable to all clients).
    - a. Choose File > Backup
    - b. Select Product Settings from the first field in the Backup dialog.
    - c. Double-click each item to move them to the selected pane, or click the Select All button.
    - d. Verify that V:\UTYYbackups appears in the **Backup location** field.

- e. Click the Backup button.
- f. Click the Done button.
7. Repeat these steps **for each data location and/or tax year** of UltraTax CS in the Virtual Office CS or SaaS environment.
8. Close UltraTax CS in the Virtual Office CS or SaaS environment.

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## Workpapers CS

To obtain a copy of your Workpapers CS™ SQL database, contact support by calling 800.968.0600 and following the prompts for Web Services.