



Installing ICAT on a New Machine

ICAT supports unlimited users per authorized QuickBooks Company File. You may install ICAT on as many machines as needed, or install ICAT on a server or in a hosted environment to provide access to multiple users.

To configure QuickBooks for multiple users, please see the set up instructions from Intuit.

ICAT stores all of its data in an XML file located in the same directory as your QuickBooks company file. The ICAT setup file contains all of your configuration information. This file is necessary to run ICAT.

When you move ICAT to a new machine or server, or install QuickBooks in a new location, you will need to move your ICAT configuration file to avoid interruption. The following tips will guide you through the installation process for moving ICAT to a new machine or a new file directory.

1. Back Up ICAT

It is a good idea to prepare a back up of your current Rate Model before migrating your ICAT Rate Model Configuration File. For instructions, see the [Back Up ICAT](#) page in the ICAT Help documentation.

2. Locate Existing ICAT Files

Your ICAT Configuration File resides in the same folder as your QuickBooks company data file. For ICAT to work properly, these files must be saved together in the new QuickBooks folder.

The QuickBooks company data file ends in ".qbw". The ICAT file will have the same name as your company file with ".CostModel.xml" appended to it. The files will be in the following filename format:

QuickBooks File: **Companyname.qbw**

ICAT Configuration File: **Companyname.qbw.CostModel.xml**

Where the "Companyname" portion is exactly the same as both the QuickBooks and ICAT file names.

ICAT Advanced Users: If you have created budgets using ICAT Advanced Edition, you will have budget files to migrate as well. Budget files will be found in the same folder as your QuickBooks data file and ICAT configuration file. They will have the following filename format:

ICAT Budget Files: **Companyname.qbw.ICATBudget_[budgetname/year].db**

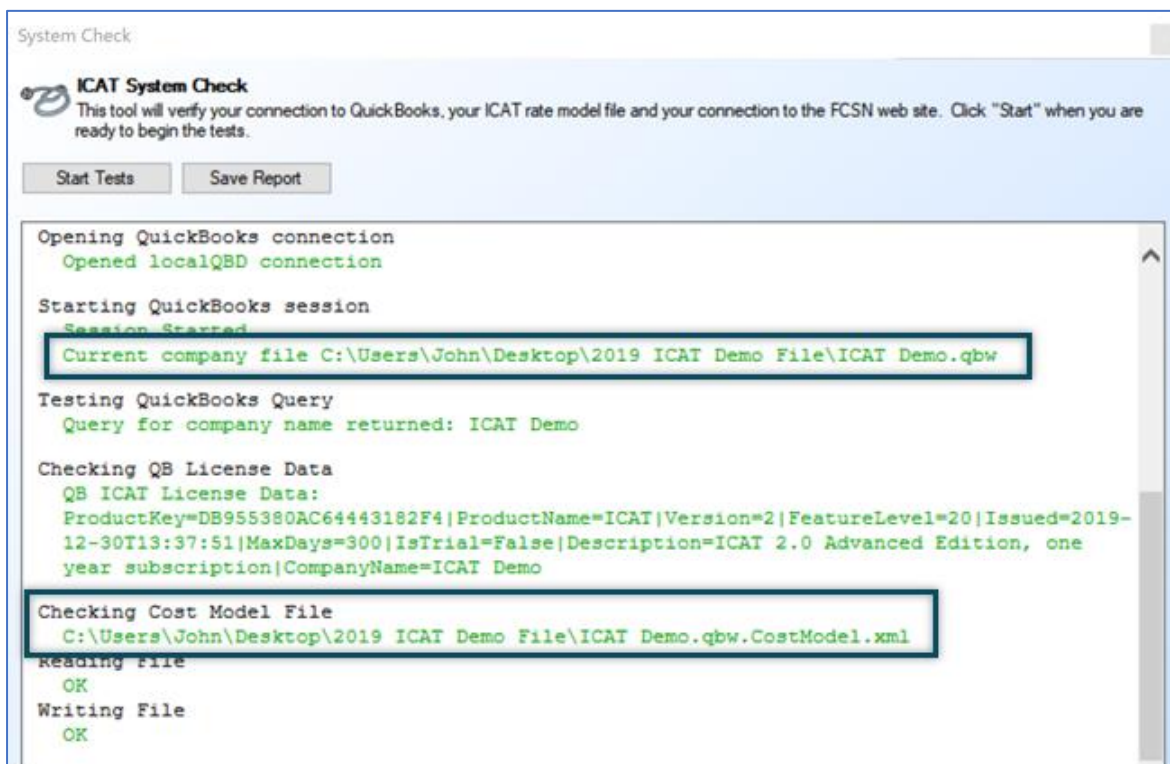


Where to find these files:

The location of your QuickBooks and ICAT files will vary based on the QuickBooks Edition, and on the Windows Installation.

If ICAT is running, you can perform the System Check to identify the location of your QuickBooks and ICAT files:

1. In ICAT, select the **Help** drop down menu.
2. Select **System Check** in the menu.
3. In the System Check report you will find the Current QuickBooks Company File location, and the Current ICAT Cost Model File location, as illustrated in the image below.
4. Navigate to this location and save/copy the CostModel.xml file to move to the new location. If you have budget files, save/copy those files for the new location as well.

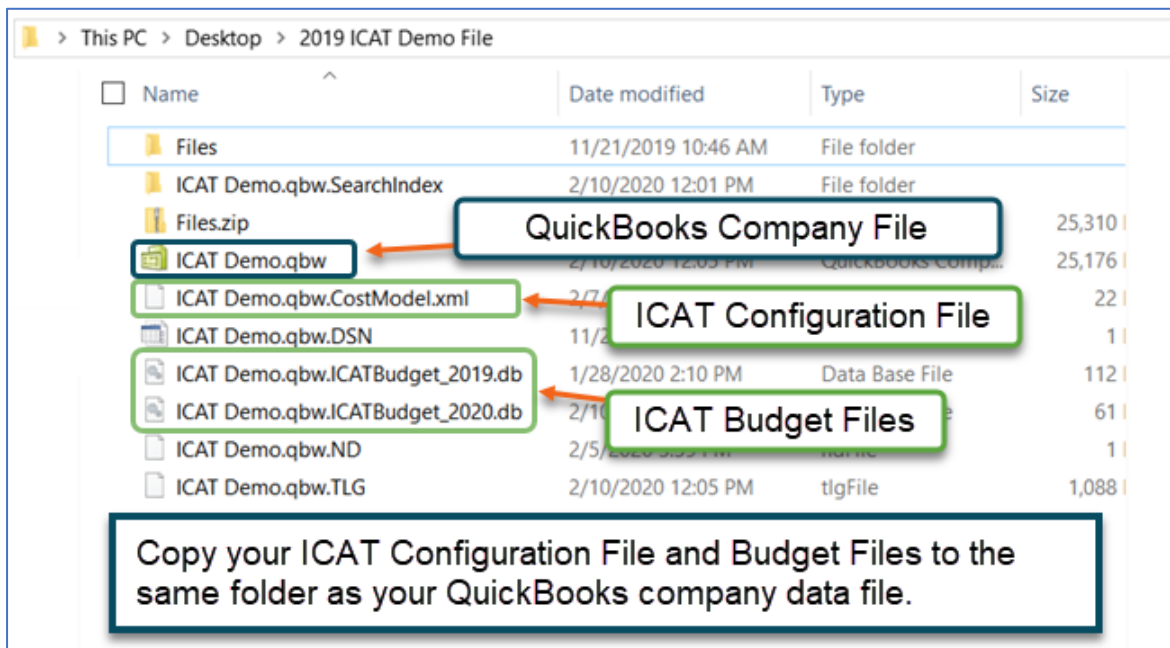


Another way to find the file location is within QuickBooks. When you select Open Previous Company, a list of company file locations will display. Your ICAT file should be in this same location the company file you use with ICAT.



3. Save ICAT Files to New Location

Navigate to the folder where your QuickBooks company file now resides, whether on the new machine/server or in a new file directory on your current machine. Save a copy of your ICAT Configuration File (ending in CostModel.XML), and if applicable, any ICAT Budget Files, to this same location. The image below shows the files that must reside in the same folder in order for ICAT to operate properly.



4. Download & Install ICAT

Make sure your new machine has the latest version of ICAT installed.

1. Download the latest version of ICAT from the ICAT Systems [website](#).
2. Double click on ICAT_SETUP.MSI to install ICAT.
3. The ICAT Installer will check your computer for required components and guide you through installation.



5. Launch ICAT on a New Machine

Important: If you launch QuickBooks and ICAT before migrating your ICAT Configuration File (ending in CostModel.XML), ICAT will create a new CostModel.XML file and the existing indirect rate model configuration will be missing.

1. After migrating your ICAT Configuration File and installing ICAT, open the QuickBooks company file previously activated with ICAT.
2. Launch ICAT. ICAT should find the correct ICAT file for the QuickBooks Company.

The first time you launch ICAT, you will need to sign into QuickBooks as an Admin to authorize ICAT, and enter the ICAT license activation key to activate the license. After ICAT has been activated with the QuickBooks company file, you should not have to reactivate with new installations.

Using ICAT

When you launch QuickBooks, then open ICAT, ICAT knows to read your ICAT file for that particular QuickBooks company. Each user will access this same QuickBooks company file and ICAT XML file to run ICAT with QuickBooks.

If you have multiple ICAT users, but your QuickBooks and ICAT files are not accessed through a shared directory, the ICAT CostModel.XML file must be copied/saved to all local machines using ICAT. The ICAT CostModel.XML file must also be updated on all machines using ICAT when the cost model configuration file is updated.

Installing Updates

When ICAT updates are available, they must be installed on each machine using ICAT. After some updates, you may be required to sign in as an Administrator in QuickBooks in order to authorize ICAT the first time you launch ICAT after the update. Remember to backup ICAT before installing updates.

In some instances, QuickBooks version updates will install the new version in a new folder/directory location. Follow the steps for migrating ICAT when you update to a new version of QuickBooks. This should include making a back up of your ICAT Configuration File, and checking that the XML file and any ICAT Budget files are saved to the new location where you QuickBooks company file has been saved before launching ICAT with your latest version of QuickBooks.