



Upgrading to a New Edition of QuickBooks

Ready to upgrade to the latest release of QuickBooks? Read this guide first to ensure ICAT continues to work after installing a new version of QuickBooks.

Before you begin

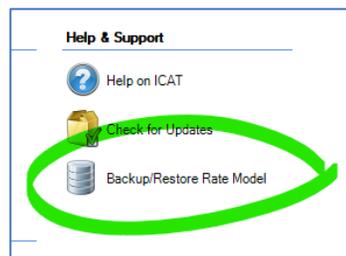
ICAT stores all of its data in an XML file located in the same directory as your QuickBooks company file. This ICAT setup file contains all of your configuration information. This file is necessary to run ICAT.

When you upgrade to a new version of QuickBooks, QuickBooks may move your company file to a new location. If this occurs, you will need to make sure your current ICAT configuration file is saved in the new directory or folder where your QuickBooks company file is now located.

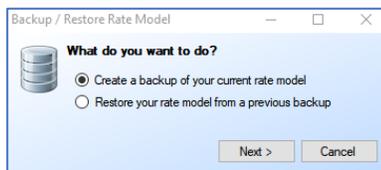
If you launch QuickBooks and ICAT without having your ICAT configuration files located in the same directory/folder as your QuickBooks company file, ICAT will create a new CostModel.xml file. This new file will not include your rate model configuration, so your data will not be correct when you run reports.

Backup ICAT before installing updates

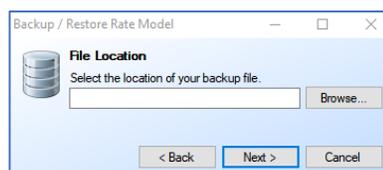
1. Select Backup/Restore Rate Model on the ICAT dashboard.



2. Select "Create a backup of your current rate model" then click "Next."



3. Choose the location where your rate model backup file will be saved, then click "Next."



4. You will receive a pop-up notification once your rate model backup file has been saved.



Confirm ICAT file location

After the QuickBooks upgrade has been installed, verify that the ICAT configuration files are saved in the same directory as your QuickBooks company file.

What to look for: 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 File: **Companyname.qbw.costmodel.xml**

Where the companyname.qbw is exactly the same as your QB companyname.qbw file

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, and 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.

You can find the company file location within QuickBooks. When you select Open Previous Company, a list of company file locations will display. Your ICAT file must be in this same location as the company file you use with ICAT.

You can also search by the file name using the naming convention above.

Migrate existing ICAT files

If your ICAT configuration file, and if applicable, budget files, are not located in the same location as your QuickBooks company file, you will need to copy over the ICAT configuration file(s) from the directory where ICAT was last used, or restore a backup of ICAT.

1. Locate the files described above:

ICAT File: **Companyname.qbw.costmodel.xml**

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

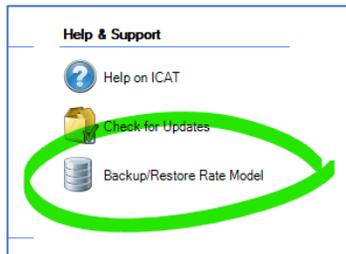
2. Move these files to the new directory where your QuickBooks company file is located.



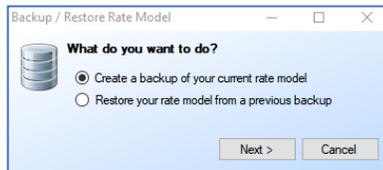
Restore a backup of ICAT

A second way to restore ICAT after installing the QuickBooks upgrade is to restore the backup of your ICAT configuration files. If you launch QuickBooks and ICAT and your ICAT reports are not showing the correct data, this step should resolve the issue.

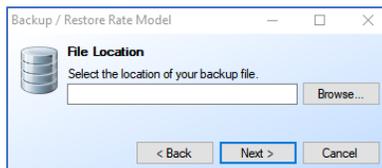
1. First launch QuickBooks and open the Company File activated with your ICAT license.
2. Next, launch ICAT.
3. Select Backup/Restore Rate Model on the ICAT dashboard.



4. Select "Restore your rate model from a previous backup" then click "Next."



5. Navigate to the location of your ICAT rate model backup XML file, then click "Next."



6. You will receive a confirmation when the file has been successfully restored. If you receive an error message, you may need to manually migrate the file.

Please note, if you have ICAT budget files you will need to manually migrate those files to the same location of your QuickBooks company file.

Using ICAT

To confirm that ICAT is working correctly after installing the QuickBooks upgrade, first open the QuickBooks company file activated with ICAT.

Next, open ICAT. ICAT should find the correct ICAT configuration file for the QuickBooks company. Run test reports to confirm your rate model is functioning properly.



Troubleshooting

ICAT stopped working after I installed the QuickBooks update.

Data is missing from my reports.

If you launch QuickBooks and ICAT without having your ICAT configuration files located in the same directory/folder as your QuickBooks company file, ICAT will create a new CostModel.xml file.

This new CostModel.xml file will not include your rate model configuration, so when you run reports your data will not be correct or may be missing altogether.

Restore your backup rate model, or, migrate the ICAT configuration file(s) from the directory where ICAT was last used to the new location of your QuickBooks company file, as described in the steps above.