# Working In The QL2 Offline Interface

While QL2 is primarily a connected "online" application, an "offline" mode is provided for cases where an internet connection is unavailable. When working in offline mode, client and item information is saved to an encrypted file on your computer. When you are again able to establish an internet connection, the contents of any offline files can be uploaded to your QL2 database.

When logging into or out of QL2, you may occasionally notice the following wait message….
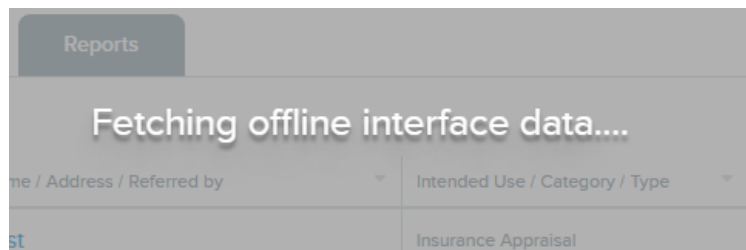
This event occurs whenever there are changes to the offline interface code or there is changed "backend" data such as Options settings, Pick Lists or other data items. This data along with the offline application is cached on your local system in order to provide the same offline data entry experience as when QL2 is connected over the internet.

When logging in on a system where the offline interface has been downloaded and your user data is present, you will have the opportunity to "go offline" after entering your username. The access point is the icon in the lower right corner of the login dialog.
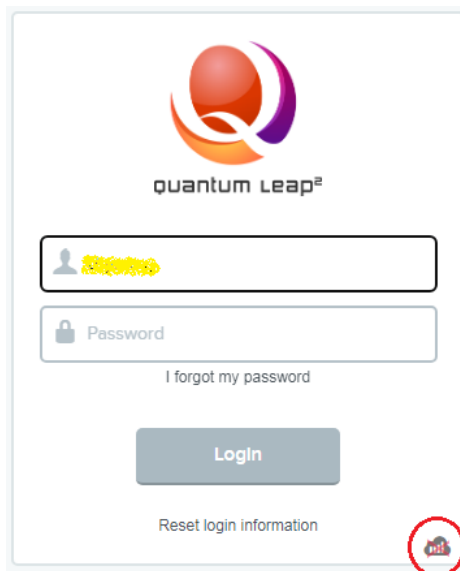
To proceed offline, you can either click the offline icon with your mouse or hold down the Shift key while you press the Enter key on your keyboard (Shift + Enter).

The offline interface

The layout in the offline interface will be a familiar combination of the QL2 Client and Item interfaces. A client's name is required to enable the Item portion of the interface. There are opportunities to save the data from this interface to the local file system as well as load data from a saved file.

> **Note:** If working in a Worksheet / Item and internet connectivity is interrupted, you may be presented with the option to save the item data to an offline file. That file can also be opened in this interface.

As many items as desired may be entered and most functionality will be present. Things that obviously need connectivity such as GIA/IGI/GCAL/WatchBase, Gem eSquare and metal spot downloads will not be functional. Any parts of an item's data that require connectivity can be accessed once the data from a saved file is uploaded and opened within QL2 online.

After all of the data has been entered for all of the items for the client, click the "Save" button at the top of the page. Depending on your browser's settings, you may be prompted for a save location. If you are not prompted, the resulting file will usually be saved to your "Downloads" folder. When first saved, in Chrome, you can find the file download at the bottom left of the page whereas, it is at the top right in FireFox. In either case, selecting "Show In Folder" will open a file window to the location where the file was saved.
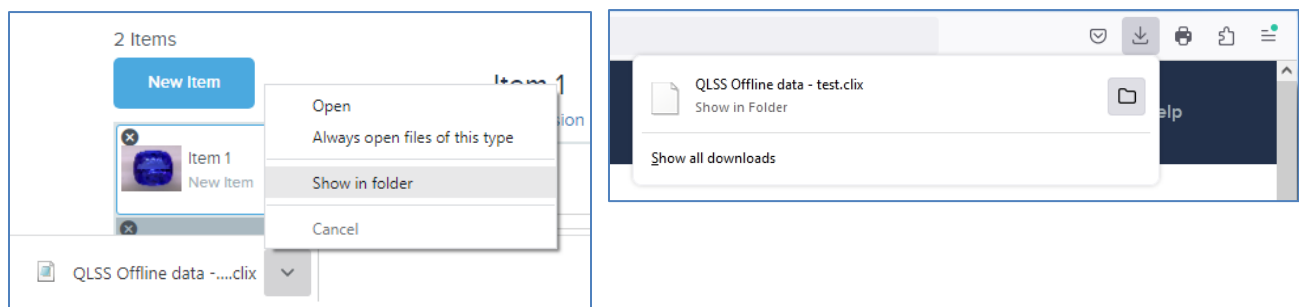
Either remember the location of the file or move it to someplace where you will be able to find it after reestablishing an internet connection and logging into QL2.

If you have additional appraisals for other clients, click the "Reset interface" link at the top of the page to clear the current contents and make ready to start the new client.

Importing the offline file

After you are once again able to log into QL2, select the "Import Client" item on the "Tools & Resources" menu. On the resulting page, click the "Select Import File" button and navigate to the saved offline file.

Note: If for some reason you cannot finish the import process at one sitting, the "Save to File" button will create a file that contains your progress to that point. To resume the import process, simply import the newly saved file.

Client Data

Client data and Options are shown in the top sections of the window.

New Client (to QL2)

- The right panel defaults to "Create new Client record".

Merge with Existing Client

- If the client data is already in QL2 the "Merge import data with a client record" bullet will be available to activate.
    - ○ "Import only the item data" (no client data) will import only item data.
    - ○ "Merge only client data" will import only the client data (not any item data).
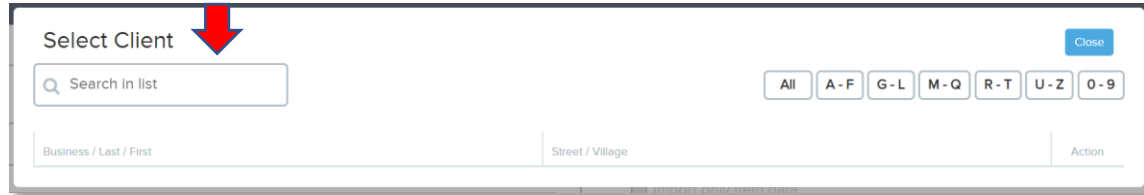
Create new worksheet with imported data

- Create new worksheet will, when imported, open a new worksheet, and merge all the client and item data. The worksheet will need to be reviewed to assure worksheet settings are correct to the intended use of the import (e.g. appropriate template, Insurance, Estate, or…)

Merge with Different Client

If you want to merge the item data with an entirely different client (from the one you entered in the offline interface) click on the "Select Different Client" button to open the Select Client window.

- Click in the Select Client search field and type the client's last name.
- Use the column header Sort/Find feature and/or scroll down, locate, and open the Client record

If merging data with an existing client, once the client is chosen, the client data will be displayed in the middle window.

There shouldn't be any data discrepancies but if you do encounter red or yellow warnings for any of the entered data, you can refer to this document (https://qlss.com/tutorials/Export-PAS-Data-Import-QL2.pdf) on mapping data for information on resolving the issues. You can also contact QLSS support and we can resolve any issues for you.

Once you have selected the appropriate import options, click the "Import Client Data" button at the top of the screen. If you have more files to import, repeat from the "Importing the offline file" step in this document.