SORMAS® Case Import Guide

This guide should provide you with everything you need to successfully import cases from .csv files into the SORMAS system. Please note that, at the current point in time, it is only possible to import **cases** and their associated **person**, **symptoms**, **hospitalization** and **epidemiological data**. Contacts, samples, and any other type of data that might be part of the SORMAS system are not yet supported.

Creating an import .csv file

Only .csv files formatted with the UTF-8 standard are accepted for the case import functionality. If you have a file with an .xls or .xlsx extension, please make sure to save it as a .csv before you try to import it into SORMAS.

It is necessary that the imported file **conforms with the column names** SORMAS uses in its internal database. To make it as easy as possible for you to format your data in a way that SORMAS can read it, you can download a template file by clicking on the Download Case Import Template button.

> **Caution:** It is important that you download this file **every time you import data into SORMAS**, even if you have downloaded it before. It is possible that the table format in the SORMAS database has changed and the columns contained in your already downloaded file are outdated, which will result in an import error at best and faulty imported data at worst.

Once you've downloaded this file, you can either paste the data from your source file into the template file and re-align the contents, so they fit the column headers, or you can copy the headers from the template, paste them into your source file and re-align them there.

> Please refer to the SORMAS Data Dictionary to learn which data the different columns expect and use it to translate your data to the SORMAS format.

> **Caution:** If any of the cases you want to import has text containing a comma **,** or semicolon **;** in one of its columns, you have to surround this text with quotation marks **"** to make sure the file is read correctly. Otherwise, you will end up either with an import error or faulty imported data.

Importing the .csv file into SORMAS

When you're done creating the .csv file containing all the cases you want to import, use the Choose File button (the name of it might be different depending on your browser and language) to select it on your disk. Afterwards, click on Upload Case List to start the upload process. Depending on the amount of cases contained in your file, this might take a while.

If the file you provided contains a column that SORMAS can't read, you will now be notified. Please make the respective adjustments and upload the file again.

If everything is alright and SORMAS can correctly read the file, the cases are imported into the SORMAS database and you will receive a message notifying you about the success or, in case something went wrong, failure of the operation. However, some of the cases still might have failed to be imported. There are multiple reasons for such an import error:

A. One of the required columns has been left empty. You will need to provide a value for that column for every case you want to import.
B. The value in one of the columns is not compatible or not allowed with/for the data type expected (e.g. text in a column that expects a number or an enum value that is not part of the enum specification according to the Data Dictionary). You will need to replace that value with a compatible one.
C. For columns that represent a **region**, **district**, **community**, **health facility** or **user**, only names that are contained within the SORMAS database are supported. Please make sure that your spelling matches the database entry in SORMAS, and also make sure that you don't enter a district that is not part of the region you entered (the same applies to communities and facilities).

Handling the detection of potential duplicates

It is possible that some of the imported cases have similarities to one or more of the already existing cases. If this happens, a dialog will open and present you with several options to solve this issue. Whether or not cases are detected as duplicates is decided based on the first and last name of their associated persons.

On top of the dialog, you will see the most important information about the case and person that are about to be imported. Below, a table containing all persons in the system whose names are similar to the one you are trying to import is displayed. This might include a link to a case of the respective person that is likely to match the information about the imported case above. Use this list to thoroughly check whether the imported person and/or case is a duplicate of one of the persons (and its associated case) already in the system, and choose one of the following actions:

- **Select a person and override its information with those of your imported person.** Choose this option when you know that your imported person is the same as one of the persons in the list. The information of the already existing person will be updated with the information provided in the import file.
- **Merge with matching case.** Choose this option if, additionally to the person, the case displayed in its table row is the same as the one you are about to import. This will update the case information with the information provided in the import file.
- **Create a new person.** Choose this option if the person and case you are about to import don't exist in the database yet. This will create both a new case and a new person associated with it.
- **Skip.** Click on this button if you have decided that you don't have enough information to make this decision, or if you don't want to import the case for any other reason.
- **Cancel.** Click on this button if you want to cancel the whole import process. All the cases imported up to this point will still be imported, but the rest of the import file will be ignored.

After your selection (unless you have decided to cancel the import), the import process will continue until either all cases have been imported or another potential similarity requires your attention.

Adjusting in case of import errors

In any of the cases described above, the import will not fail completely, but only the affected cases will not be imported. If at least one case could not be imported, you can download an error report file by clicking on the Download Error Report button. This file contains all cases that could not be imported as well as a short text informing you about the responsible value.

Use this file to make the required adjustments as indicated by the information texts. Afterwards, upload this error report file just as you did it with your original .csv file. You don't have to remove the error message column as it will be automatically ignored. If further import errors are detected, you will have to repeat this process until all cases have been successfully imported.

At this point, you're done, and all cases should have been added to the SORMAS database. When you close the import dialog by clicking on the small icon in the top right, the case list will be reloaded, and you should immediately be able to work with the new imported cases.