

# SORMAS® Document Template Guide

This guide describes the creation and usage of document templates. Document templates are used to generate documents based on data available in SORMAS, e.g., to issue a quarantine order for a case.

A document template can be any .docx file, where placeholders are filled in with actual data when generating the document. Besides data from SORMAS as described in the **SORMAS Data Dictionary**, templates can have placeholders for additional information to be filled in by the user generating the document, such as remarks.

## 1) Creating placeholders in a .docx template file

To create a document template, start with the .docx document normally issued in the workflow at hand. In this document, create placeholders for data you want to be filled when the document is generated.

### Using Microsoft Word:

To create a placeholder or **MergeField**, press Ctrl + F9. This inserts a pair of curly brackets "{}". Right-click these and choose **"Edit Field"** from the context menu. Choose **"MergeField"** from the list at the left side of the window that opens now. Enter the name of your placeholder prefixed by a dollar sign "\$" in the **"Field Name"** input, e.g., **"\$case.person.firstName"** for the first name of a case's person. Finally click **"Ok"**.

### Using LibreOffice:

To create a placeholder, insert the placeholder's name surrounded by curly brackets "{}" and prefixed by a dollar sign "\$" in the text. E.g., to create a place holder for the case person's first name, insert **"\${case.person.firstName}"** in the place you want the name to appear.

## 2) Placeholders for case data from SORMAS

A template workflow, such as the issuing of a quarantine order, has a **root entity** which is the starting point for all placeholders that are filled using case data. For quarantine orders, this root entity is **"\$case"**. The available information for a **"\$case"** is described in the **SORMAS Data Dictionary** in the **"Case"** tab, so examples for available placeholders are **"\$case.epidNumber"** or **"\$case.reportDate"**.

For further SORMAS entities referenced from the root entity **"\$case"** – such as, e.g., the case person – available placeholders are listed in the respective tab (here: **"Person"**). Thus, valid placeholders are **"\$case.person.firstName"** or **"\$case.hospitalization.admissionDate"**.

Please refer to the **SORMAS Data Dictionary** to learn which data is available in SORMAS and how the respective placeholders or merge fields are named.

**Caution:** Before using a document template in production, test thoroughly if all placeholders are filled in correctly and documents are generated properly.

### 3) Custom placeholders

A document template can use further custom placeholders to be filled by the user. Every placeholder that cannot be derived from the root entity is a custom placeholder. When generating a document from a template containing custom placeholders, the user is prompted to supply the respective information. E.g., if the template contains placeholders such as “\$remarks” or “\$supervisor.roomNumber”, the user is presented a form to fill in this information.

### 4) Uploading document templates

Templates can be uploaded under [Configuration > Document Templates](#). The template file will be saved under the name of the upload file which is also used later to present a list of available documents when generating documents. Thus template file names should be meaningful.

### 5) Generating documents

In workflows where document generation is implemented, the user can choose a template from a list of available templates. If the chosen template contains custom placeholders, the user is asked to fill in this information (e.g., if the templates provides the possibility to add remarks or the like).

Whenever the data for a placeholder is not available – i.e., the data is not recorded in the SORMAS database or a custom placeholder is left empty when prompted – an indicator “./.” is inserted in the generated document.

The document is then generated for download as a .docx document.

**Caution:** Placeholders are filled only if the user generating the document has the user rights to see the respective information. If the information for a placeholder is not available, this is indicated by “./.” in the generated document. If you see this indicator for missing data in places where you would expect data to be filled in, check if you have sufficient user rights to see this information.