

SORMAS® Contact Import Guide

This guide should provide you with everything you need to successfully import contacts from .csv files into the SORMAS system. Please note that, at the current point in time, it is only possible to import **contacts** and their associated **person and case** (except for case contacts import).

1) Creating an import .csv file

Only .csv files formatted with the UTF-8 standard are accepted for the contact import feature. 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 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that the table format in the SORMAS database has changed and the columns contained in your already downloaded file are outdated, which will result in an import error at best and incorrectly imported data at worst.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 contacts 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 incorrectly imported data.

2) Importing the .csv file into SORMAS

When you're done creating the .csv file containing all the contacts 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 [Start Data Import](#) to start the upload process. Depending on the amount of contacts 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 contacts 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 contacts 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 contact 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, point of entry** 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).

3) Handling the detection of potential duplicates

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

On top of the dialog, you will see the most important information about the person that is about to be imported. Below, a table containing all persons in the system that are similar to the one you are trying to import is displayed. Use this list to thoroughly check whether the imported person is a duplicate of one of the contacts already in the system, and choose one of the following actions:

- **Pick an existing person.** Choose this option when you know that your imported person is the same as one of the persons in the list. You need to select that person in the list below. **Only do this if you are sure that it is a duplicate!** It is much worse to lose information about unique persons than to accidentally create a copy of an already existing person.
- **Create a new person.** Choose this option if the person you are about to import does not exist in the database yet. This will create a new person containing all the information from the file.
- **Discard.** 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 person for any other reason.

After your selection, the import process will continue until either all contacts have been imported or another potential person similarity requires your attention.

4) Adjusting in case of import errors

In any of the cases that could lead to import errors described in 3), the import will not fail completely; only the affected contacts will not be imported. If at least one contact could not be

imported, you can download an error report file by clicking on the [Download Error Report](#) button. This file contains all contacts 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 contacts have been successfully imported.

At this point, you're done, and all contacts 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 directory will be reloaded, and you should immediately be able to work with the new imported contacts.