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**, **epidemiological data**, **health conditions**, **port health information** as well as any disease-specific details. Additionally, it is possible to import **samples** and **pathogen tests** for every case. Contacts and any other type of data that might be part of the SORMAS system are not yet supported.

1) Creating an import .csv file

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that the table format in the SORMAS database has changed and the columns contained in your already downloaded file are outdated, which will result in an import error at best and incorrectly imported data at worst.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

The case import template contains two header rows: The second one is the name of the property, e.g. the disease, while the first one indicates what the property belongs to, e.g. the case itself, the person that the case is associated to or a sample that has been taken.

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 incorrectly imported data.

2) Adding samples and pathogen tests to your import

SORMAS supports the import of **samples** and **pathogen tests** during the case import. The import template already contains columns for one sample and one pathogen test. You can copy and paste the two header rows containing these columns to the right to import as many samples and pathogen

tests as you need to. **Please note** that you need to set up the headers for the **maximum number of samples and pathogen tests** one of the cases you import will have. The import will automatically skip the creation of a sample and pathogen test whenever the respective table cells of a case are empty.

3) 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 Start Data Import 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**, **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).

4) 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 as well as the disease, region and report date of the case.

On top of the dialog, you will see the most important information about the case that is about to be imported. Below, a table containing all cases 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 case is a duplicate of one of the cases already in the system, and choose one of the following actions:

- **Pick an existing case.** Choose this option when you know that your imported case is the same as one of the cases in the list. You need to select that case 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 cases than to accidentally create a copy of an already existing case. Check the check box stating "*Override existing case with changes from the imported case?*" if you want to update the case you selected with the information from the import template.
- **Create a new case.** Choose this option if the case you are about to import does not exist in the database yet. This will create a new case containing all the information from the file.
- **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.

5) 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 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 directory will be reloaded, and you should immediately be able to work with the new imported cases.