SORMAS® Travel Entry Import Guide

This guide should provide you with everything you need to successfully import DEA travel entries from .csv files into the SORMAS system. Please note that SORMAS currently supports a basic version of DEA data that will work with a .csv file exported from DEA, but requires some additional columns in order to be compatible with the SORMAS data model.

1) Creating an import .csv file

Only .csv files formatted with the UTF-8 standard are accepted for the event 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.

SORMAS can read .csv files exported from DEA. At this point, all information about the travel entry is collected and stored as JSON in a single database column. However, travel entries in SORMAS support a number of additional fields, some of which are mandatory, that can or need to be added to the .csv file. For these columns, It is necessary that their caption (i.e. the first line) **conforms with the column names** SORMAS uses in its internal database.

> Please refer to the **SORMAS Data Dictionary** to learn how the columns have to be named and which data the different columns expect, and use it to translate your data to the SORMAS format.

The following travel entry fields are mandatory and need to be part of the import file:

- responsibleRegion
- responsibleDistrict
- pointOfEntry
- disease
- reportDate
- dateOfArrival

However, all of these fields can be omitted under specific circumstances:

- responsibleRegion is automatically filled if the user that performs the import has a region assigned to them
- responsibleDistrict is automatically filled if the user that performs the import has a district assigned to them
- pointOfEntry is automatically filled if the user that performs the import has a point of entry assigned to them
- disease is automatically filled if the user that performs the import has a limited disease set OR if the server only has one primary case-based disease active
- reportDate is automatically set to the current date and only needs to be included if it is supposed to be changed

Please note that SORMAS automatically tries to map certain column names to person fields in order to create a person that is associated with the travel entry. At the time of writing, the following

captions are interpreted like this. Changing these captions will lead to the information being imported into the general travel entry information instead, and changing the captions for first and last name will lead to the import failing.

- Nachname
- Vorname
- Geschlecht
- Geburtsdatum
- Tel. persönlich
- Tel. weitere
- E-Mail Adresse

3) Importing the .csv file into SORMAS

When you're done creating the .csv file containing all the travel entries 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 travel entries 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 travel entries 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 travel entries 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 event 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**, **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 the person information of some of the imported travel entries 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 their first and last name, sex, and birth date (if this data is available).

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 persons 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.
> ▪ **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 travel entry for any other reason.
> ▪ **Cancel.** Click on this button if you want to cancel the whole import process. All the travel entries 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 travel entries have been imported or another potential similarity requires your attention.

5) Adjusting in case of import errors

In any of the travel entries that could lead to import errors described in 3), the import will not fail completely; only the affected travel entries will not be imported. If at least one travel entry could not be imported, you can download an error report file by clicking on the Download Error Report button. This file contains all travel entries 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 travel entries have been successfully imported.

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