

SORMAS® Email Template Guide

This guide describes the creation and usage of email templates. Email templates can be used to send emails to case, contact, event participant, or travel entry persons.

An email template can be any .txt file, where placeholders are filled in with actual data when generating the email. 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 email, such as remarks.

The first line of any email template needs to start with a “#” character followed by at most 50 characters. These will be used as the subject of the email. If this line is missing from the template, uploading it to SORMAS will fail.

1) Creating placeholders in a .txt template file

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

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 data from SORMAS

A template workflow has a **root entity** which is the starting point for all placeholders that are filled using data from SORMAS. E.g., for emails sent out to case persons, 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.

To see which data is available for a workflow, have a look at the example templates, available for download in the template upload dialog.

Caution: Before using an email template in production, test thoroughly if all placeholders are filled in correctly and emails are generated properly.

3) Custom placeholders

An email 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 an email 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) Empty values

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 email.

In cases where an empty variable should not be shown at all, prefix the variable with an exclamation mark. For example “\$!case.person.phone” is only displayed, if the value of the variable is not empty.

5) Uploading document templates

Templates can be uploaded under [Configuration > Email 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 templates when generating emails. Thus template file names should be meaningful.

6) Generating and sending emails

In workflows where email 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).

Additionally, the user must choose an email address associated with the case, contact, event participant, or travel entry person. The primary email address is automatically selected.

The email is then sent to the associated person. Please note that sending emails is not possible if the person does not have any email address specified.

Caution: Placeholders are filled only if the user generating the email 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 email. 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.

7) Template Workflows

The following email template workflows are available in SORMAS:

- **Templates for Cases:**
Available root entities:
 - **case:** case data
 - **person:** the case’s person
 - **user:** the current user

- **Templates for Contacts:**

Available root entities:

- **contact:** contact data
- **person:** the contact person
- **user:** the current user

- **Templates for Event Participants:**

Available root entities:

- **eventParticipant:** eventParticipant data
- **person:** the eventParticipant person
- **user:** the current user

- **Templates for Travel Entries:**

Available root entities:

- **travelEntry:** travelEntry data
- **person:** the travelEntry person
- **user:** the current user