

SORMAS® Self Report Import Guide

This guide should provide you with everything you need to successfully import self reports from .csv files into the SORMAS system.

1) Creating an import .csv file

Only .csv files formatted with the UTF-8 standard are accepted for the self report 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 properly format your data, you can download a template file by clicking on the [Download Self Report 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that the table format in the SORMAS database has changed and the columns contained in your already downloaded file are outdated, which will result in an import error at best and incorrectly imported data at worst.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 self reports 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 self reports 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 number of self reports 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 self reports 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 self reports 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 self report 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, 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) Adjusting in case of import errors

In any of the cases that could lead to import errors described in 2), the import will not fail completely; only the affected self reports will not be imported. If at least one self report could not be imported, you can download an error report file by clicking on the [Download Error Report](#) button. This file contains all self reports 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 self reports have been successfully imported.

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