

# SORMAS Dashboard: Contacts



This guide provides step-by-step instructions on how to navigate and use the SORMAS Dashboard to see an overview of all Contacts. The guide highlights the importance of setting date filters, applying filters, and utilizing the interactive features of the dashboard.

1

Using a laptop, go to <https://demo.sormas.org/>

Log in as the "National User".

This is a place to practice using SORMAS software with fictitious data entries as an example of how SORMAS could be used in real life. We give you a password to log in and test it as a certain role.

Your organisation will have it's own SORMAS installation that may be slightly customised to meet your needs.

2

Look at the red dot showing you where to click for the next step.

When you click on 'Log in as National User' you will be given high level access in the SORMAS system.





Tip! This is a demo site with no real information. It will be deleted after a short time. So please use this site to practice. You can't break anything! Please don't put real names or information in our demo system.

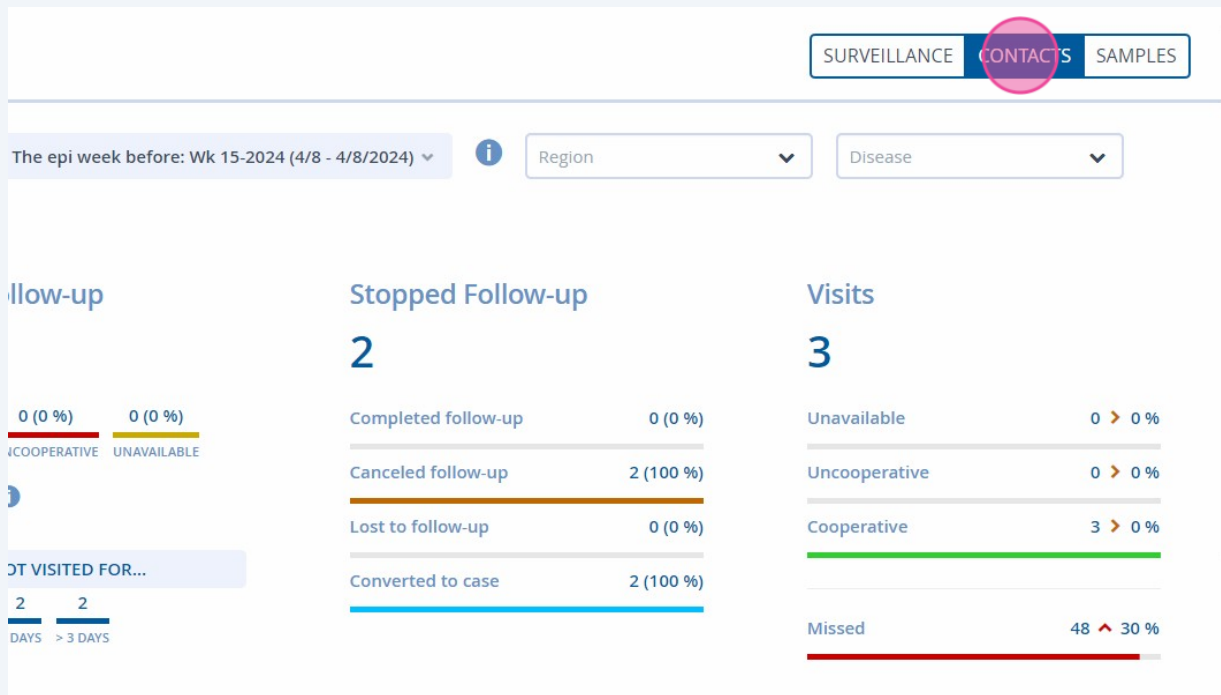
3

The first page you see in SORMAS is the Dashboard. If needed, you can find the dashboard again by looking in the left Blue Menu and click on "Dashboard".

The screenshot displays the SORMAS interface. On the left is a blue navigation menu with icons and labels for 'Dashboard', 'Tasks', 'Persons', 'Cases', 'mSERS', and 'Contacts'. The 'Dashboard' item is highlighted with a pink circle. The main content area shows the 'Event' page for 'Rallye (V5BLSD)' on 10/9/2023. The page has tabs for 'EVENTS LIST', 'EVENT', 'EVENT PARTICIPANTS', and 'EVENT ACTIONS'. The 'EVENT' tab is active. The 'Event data' section includes: 'EVENT ID' (V5BLSD-Q4JX3S-WRZP3E-CUM22EFQ), 'DATE OF REPORT \*' (10/10/2023), 'EVENT STATUS \*' (with buttons for SIGNAL, EVENT, SCREENING, CLUSTER, DROPPED), 'EVENT IDENTIFICATION SOURCE' (with buttons for UNKNOWN, BACKWARD-TRACING, FORWARD-TRACING), and 'EPIDEMIOLOGICAL RISK LEVEL' (a dropdown menu).

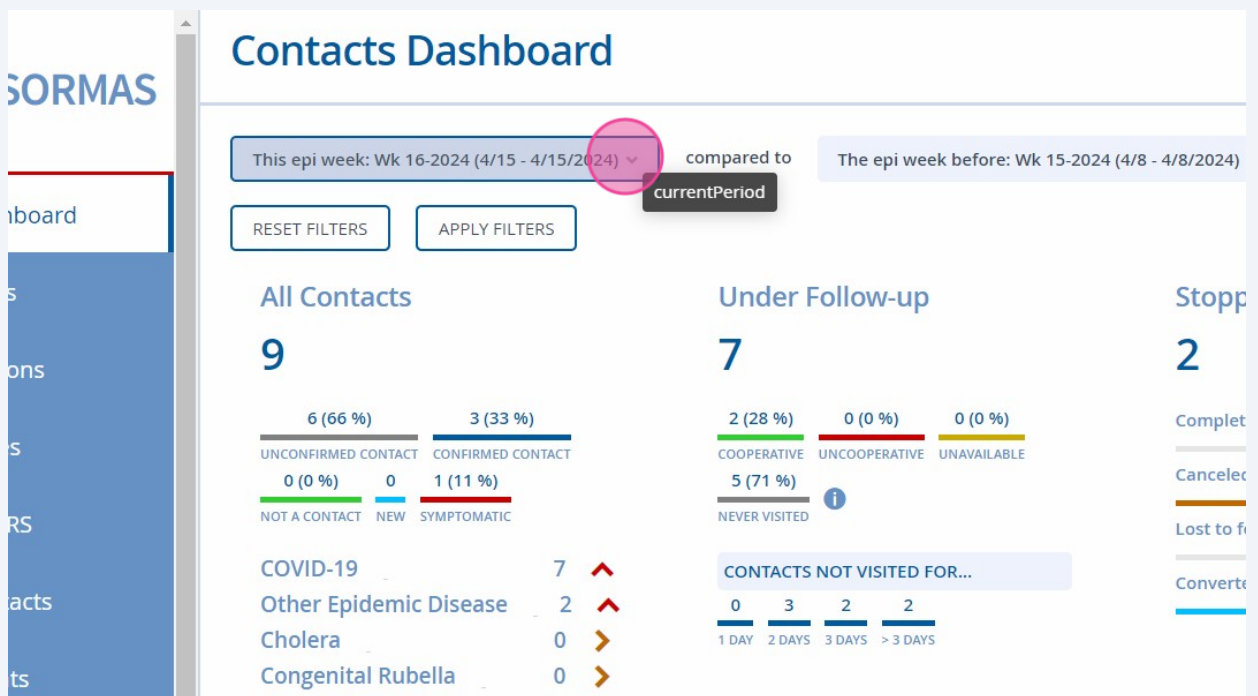
4

Click "CONTACTS" in the top right. This will show the dashboard for contacts with a summary of all information.



5

The next important step is to choose the dates you need.





Tip! If you still can't see any data it may be because the dates you choose have no data. For demonstration purposes we have added realistic data for the previous 6 months.

6 Now you must APPLY FILTERS. This is a two step process.

First you set the filter and then you apply the filter

The screenshot shows the SORMAS Contacts Dashboard. On the left is a navigation menu with options: Dashboard, Tasks, Persons, Cases, mSERS, Contacts, and Events. The main content area is titled 'Contacts Dashboard' and shows data for 'This year: 1/1/2024 - 4/15/2024' compared to 'Same period last year: 1/1/2023 - 4/15/2023'. There are buttons for 'RESET FILTERS' and 'APPLY FILTERS', with the latter highlighted by a pink circle. The dashboard displays two main sections: 'All Contacts' and 'Under Follow-up'. 'All Contacts' shows a total of 9 contacts, broken down into Unconfirmed (6, 66%), Confirmed (3, 33%), Not a Contact (0, 0%), New (0), and Symptomatic (1, 11%). A table below lists diseases: COVID-19 (7), Other Epidemic Disease (2), Cholera (0), and Congenital Rubella (0). 'Under Follow-up' shows 7 contacts, broken down into Cooperative (2, 28%), Uncooperative (0, 0%), and Unavailable (0, 0%). A 'NEVER VISITED' section shows 5 (71%) contacts, with a sub-section 'CONTACTS NOT VISITED FOR...' showing 0 for 1 day, 3 for 2 days, 2 for 3 days, and 2 for > 3 days.



Tip! Filters often need to be set and then applied. It is a two step process.

7

Next look for the drop down box in the top right to choose a disease

The dashboard displays three main sections: Follow-up, Stopped Follow-up, and Visits. The 'Disease' dropdown menu is highlighted with a pink circle.

**Follow-up**

1 (25%)	1 (25%)
UNCOOPERATIVE	UNAVAILABLE

**DT VISITED FOR...**

0	4
DAYS	> 3 DAYS

**Stopped Follow-up**

Completed follow-up	0 (0%)
Canceled follow-up	0 (0%)
Lost to follow-up	0 (0%)
Converted to case	0 (0%)

**Visits**

Unavailable	1
Uncooperative	1
Cooperative	0 > 0%
Missed	62 ^ 313%

8

Click "COVID-19"

The dashboard is the same as in the previous screenshot, but the 'Disease' dropdown menu is open, showing a list of diseases. 'COVID-19' is highlighted with a pink circle.

**Follow-up**

1 (25%)	1 (25%)
UNCOOPERATIVE	UNAVAILABLE

**DT VISITED FOR...**

0	4
DAYS	> 3 DAYS

**Stopped Follow-up**

Completed follow-up	0 (0%)
Canceled follow-up	0 (0%)
Lost to follow-up	0 (0%)
Converted to case	0 (0%)

**Visits**

Unavailable	1
Uncooperative	1
Cooperative	0 > 0%
Missed	62 ^ 313%

**Disease List:**

- COVID-19
- Cholera
- Congenital Rubella
- Ebola Virus Disease
- Human Rabies
- Influenza (New subtype)
- Lassa
- Monkeypox
- Not Yet Defined

9 Click here to apply the filter.

**SORMAS**

### Contacts Dashboard

This epi week: Wk 18-2024 (4/29 - 4/29/2024) compared to Same epi week last year: Wk 18-2

RESET FILTERS **APPLY FILTERS**

#### All Contacts

**4**

4 (100%)	0 (0%)
UNCONFIRMED CONTACT	CONFIRMED CONTACT
0 (0%)	0 (0%)
NOT A CONTACT	NEW SYMPTOMATIC

#### Under Follow-up

**4**

0 (0%)	1 (25%)	1 (25%)
COOPERATIVE	UNCOOPERATIVE	UNAVAILABLE
2 (50%)		
NEVER VISITED		

CONTACTS NOT VISITED FOR...

0	0	0	4
1 DAY	2 DAYS	3 DAYS	> 3 DAYS

COVID-19 2 >  
Other Epidemic Disease 2 ^  
Cholera 0 >  
Congenital Rubella 0 >

10 Under the map you can find a link to open the Disease Transmission Chain.

Wk 17-2024 0  
Wk 18-2024 0

GROUPING DATA

MAP KEY LAYERS

PLEASE MAXIMIZE TO VIEW THE DISEASE TRANSMISSION CHAINS

Please maximize to view the disease transmission chains

11

Use the filters to change the dates you want to view. Look for the drop down box in the top left.

The screenshot shows the SORMAS Contacts Dashboard. On the left is a navigation menu with the SORMAS logo at the top and several menu items. The main content area is titled "Contacts Dashboard". Below the title, there is a filter section. A dropdown menu is open, showing "This epi week: Wk 18-2024 (4/29 - 4/29/2024)" with a pink circle highlighting the dropdown arrow. To the right of this dropdown is the text "compared to" and another dropdown showing "Same epi week last year: Wk 18-2023 (4/24 - 4/24/2023)". Below these are two buttons: "RESET FILTERS" and "APPLY FILTERS". The main content area below the filters displays "No data available".

12

Click "Custom"

The screenshot shows the SORMAS Contacts Dashboard. On the left is a navigation menu with the SORMAS logo at the top and several menu items: Dashboard, Tasks, Persons, Cases, mSERS, Contacts, and Events. The main content area is titled "Contacts Dashboard". Below the title, there is a filter section. A dropdown menu is open, showing "This epi week: Wk 18-2024 (4/29 - 4/29/2024)" with a pink circle highlighting the dropdown arrow. To the right of this dropdown is the text "compared to" and another dropdown showing "Same epi week last year: Wk 18-2023 (4/24 - 4/24/2023)". Below these are four buttons: "Custom" (highlighted with a pink circle), "Today: 4/29/2024", "Yesterday: 4/28/2024", and "This epi week: Wk 18-2024 (4/29 - 4/29/2024)". The main content area below the filters displays "No data available".

13 Under Custom Period choose "By Date".

The screenshot shows the SORMAS Contacts Dashboard. On the left is a navigation menu with options: Dashboard, Tasks, Persons, Cases, mSERS, Contacts, and Events. The main content area is titled 'Contacts Dashboard'. At the top, it shows 'This epi week: Wk 18-2024 (4/29 - 4/29/2024)' compared to 'Same epi week last year: Wk 18'. Below this are buttons for 'Custom', 'Today: 4/29/2024', 'Yesterday: 4/28/2024', and 'This epi week: Wk 18-2024 (4/29 - 4/29/2024)'. The 'CUSTOM PERIOD' dropdown is open, showing 'By Epi Week' and 'By Date' (highlighted with a pink circle). Below the dropdown are 'FROM EPI WEEK' and 'TO EPI WEEK' dropdowns, both set to 'Wk 18-2024 (4/29 - 5/5)'.

14 Choose from September 1st 2023 to today.

The screenshot shows the SORMAS Contacts Dashboard with the 'By Date' option selected in the 'CUSTOM PERIOD' dropdown. The 'FROM' date is set to 4/22/24 and the 'TO' date is 4/29/24. A date picker calendar is open, showing March 2024. The calendar has a pink circle around the left arrow, indicating the user is navigating to a previous month. The calendar grid shows dates from 25 to 31. The 'AP' button is visible on the right side of the dashboard.



**15** Click "APPLY CUSTOM FILTER"

SURVEILLANCE CONT

compared to Same epi week last year: Wk 18-2023 (4/24 - 4/24/2023) *i* Region COVID-19

Yesterday: 4/28/2024 This epi week: Wk 18-2024 (4/29 - 4/29/2024) Last epi week: Wk 17-2024 (4/22 - 4/28) This year: 1/1/2024 - 4/29/2024

1/23 TO 4/29/24 **APPLY CUSTOM FILTER**

**16** Click anywhere to close the box.

9/1/23 4/29/24 **APPLY CUSTOM FILTER**

*(A pink circle is shown in the center of the page, indicating where to click to close the box.)*

17 Now you can see the APPLY FILTER button.

The screenshot shows the SORMAS interface. On the left is a navigation menu with options: Dashboard, Tasks, Persons, Cases, mSERS, Contacts, and Events. The main area is titled 'Contacts Dashboard'. It features two date range selectors: '9/1/2023 - 4/29/2024' and 'Same period last year: 9/1/2022 - 4/29/2023'. Below these are two buttons: 'RESET FILTERS' and 'APPLY FILTERS'. The 'APPLY FILTERS' button is circled in pink. Below the buttons, the text 'No data available' is displayed.

18 With appropriate dates selected you can see the disease network diagram



19 Click this dropdown on "Select by Classification"

The screenshot displays the SORMAS interface. On the left is a navigation menu with items: Dashboard, Tasks, Persons, Cases, nSERS, Contacts, Events, and Samples. The main content area features a date range selector (9/1/2023 - 4/29/2024) compared to 'Same period last year: 9/1/2022 - 4/29/2023', with 'RESET FILTERS' and 'APPLY FILTERS' buttons. Below this is a 'Select by Classification' dropdown menu, which is highlighted with a pink circle. To the right of the dropdown is a 'Legend' with four categories: Healthy (green person icon), Not yet classified (grey person icon), Suspect case (yellow person icon), and Probable case (orange person icon). The main visualization is a 'Disease network diagram' showing a central orange node labeled 'RFYNUZ' connected to several green nodes. Arrows indicate the direction of transmission, with numbers '1' and '2' on the arrows. A grey node is also visible on the right side of the network.



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End of Step by Step Guide