

# Contact Trace Report Installation Instructions

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## Report Installer Overview

The Contact Trace Report uses two SQL Server views, one of which utilizes two locally defined UDFs. The "Contact Trace Report Installer.exe" preloads the Velocity Reports folder location and confirms the name, user defined field (UDF) number and data type for both UDFs. At this point the "Copy Files to Reports Folder" button is enabled. Clicking on that button creates the report views in Velocity database on SQL Server and places the report files in the Velocity Reports folder ready for the Report Manager installer. This document describes each step.

The user account will require file creation privileges on the Velocity Reports folder and CREATE VIEW privileges on the Velocity SQL Server.

## Velocity Report Preparation Instructions

1. Open the **Velocity Enrollment Manager**.
2. Click on **Tools -> User Defined Fields...**
3. Add 2 new fields or repurpose existing fields as follows:  
First field: Caption "**Contact Status**"; Type = **Text**  
Second Field: Caption "**Trace Start Date**"; Type = **Date**
4. Click **OK** to close the **User Defined Setup** page.

## Contact Trace Report Installation

1. Unzip the installation package.
2. Run **Contact Trace Report Installer.exe** as an Administrator.
3. On startup the utility initializes the Velocity Reports folder location and confirms the “**Contact Status**” and “**Trace Start Date**” UDFs are configured correctly.

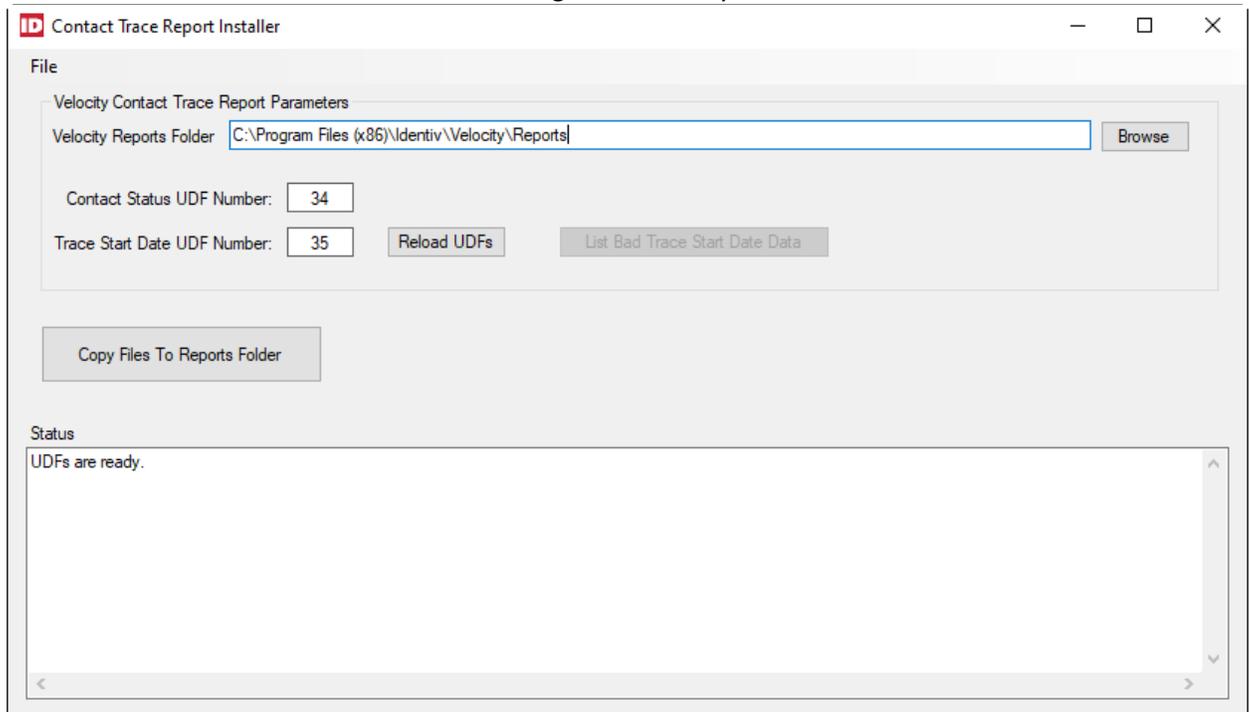


Figure 1 Trace Report is ready

4. In the event of a UDF problem, the "Copy Files..." button is disabled and the Status window will report the problem. Correct the issue in Velocity and click "Reload UDFs". The "Copy Files..." button will be enabled.
5. Click the "Copy Files to Reports Folder".

## Trace Start Date UDF Data Problem

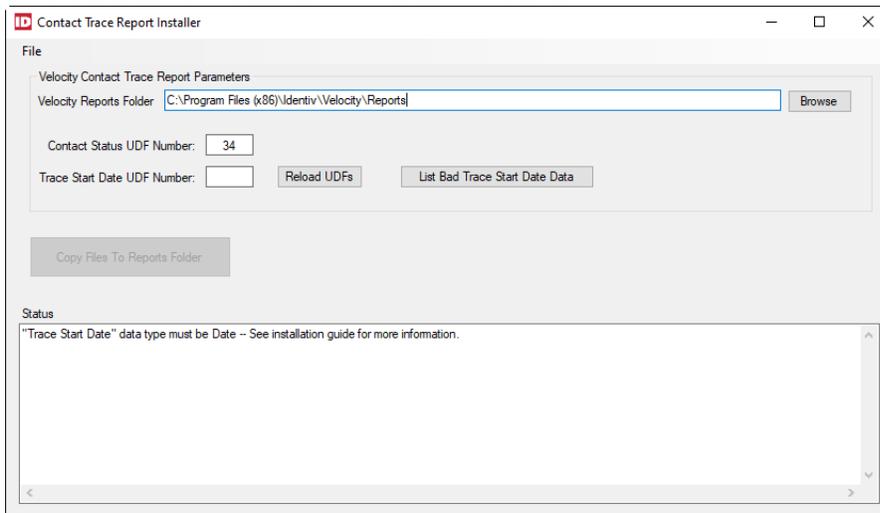
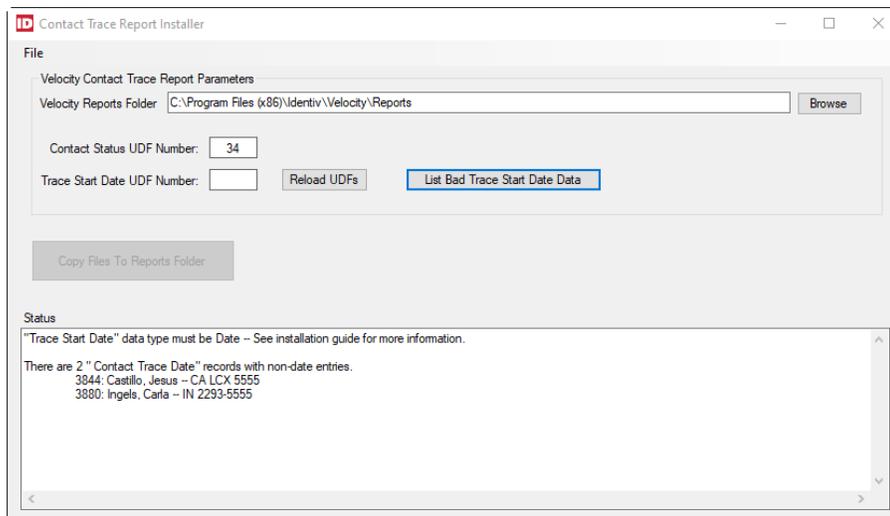


Figure 2 Trace Start Date not ready

1. [Optional] Click the "List Bad Trace Start Date Data" button to be report a list of the problematic entries.



2. Correct the data problem in Enrollment Manager. (ref. [Velocity Report Preparation Instructions](#))
3. Click "Reload UDFs".

## Final Steps

1. Open the **Velocity Report Manager**.
2. [Best Practice] Add a unique report group for custom reports.
3. Right-mouse click the desired report group and select "**Add -> Report...**".
4. Double-click the report file "**Contact Tracing Report.rpt**".  
Note: Only the .rpt files will appear in the selection list.
5. The report is now installed and ready to be used.