

OPAS

The Orchestra Planning and Administration System

Created by Woelbitsch & Partner, KG

Distributed in North America by Fine Arts Management

www.fineartsmanagement.com

OPAS

OPAS - The **O**rchestra **P**lanning and **A**dministration **S**ystem - was written by Woelbitsch & Partner, KG, and developed in association with the

- American Symphony Orchestra League
- Fine Arts Management
- Devco, Inc.

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OPAS

**The Orchestra
Planning and
Administration
System**

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Chapter

1

Chapter 1 Introduction to OPAS

About this manual

This manual is designed to give the reader an introduction to OPAS - the Orchestra Planning and Administration System.

This guide will show you how to install OPAS, and describe features and functions of the software.

If you are evaluating OPAS, this manual can be used in conjunction with the demonstration version and OPAS demonstration database. The demonstration version of the program performs like the licensed version in every way except that it is time sensitive; it will cease to function in roughly six weeks time. Once a license for OPAS is purchased, Fine Arts Management removes this restriction.

OPAS is a very powerful and highly customizable software program. It is not the design nor intent of this manual to cover every feature, function and option available to the User of OPAS, merely the most salient aspects of the software.

If you are a new OPAS user, or evaluating the software, we recommend that you proceed as follows:

- Read the next section, “What is OPAS?” and “Areas of the Program” to better familiarize yourself with the program and its capabilities, and to pinpoint those functions which are of most use or interest to your orchestra.
- Install OPAS following the instructions in Chapter 2.
- Review Chapter 23 for conventions and basic program operations.
- Read the “Starting OPAS” section of Chapter 2 to start the program.
- Using this document for orientation, explore the various aspects of OPAS that are most needed by your orchestra, or are of the most interest. You do not need to read or follow this guide in sequence. The chapters are laid out in a logical progression that

reflects the underlying logic of the program, but feel free to skip around and view only those parts that are of particular interest

What is OPAS?

OPAS is a comprehensive software program designed specifically to manage the various facets of orchestra administration. OPAS has been designed and developed in association with some of the country's leading orchestras, and has become a highly refined and unique tool for managing all facets of a modern symphony orchestra, chorus, festival or chamber ensemble.

Specifically, OPAS directs an orchestra's Schedule, Repertoire, Guest Artists and Conductors, Personnel Attendance and Payroll, Score Library, Instrument Cases and Insurance, Tours, Expenses and Production Information. It does this through the use of a central database, so regardless of what area(s) of the program are used, the data is related and all-inclusive.

Since all the data is related, OPAS provides the unparalleled ability to analyze your orchestra's data over a wide variety of program areas and time periods.

OPAS can run on a single computer, or over a network. If installed on a network, all Users will share the same database. OPAS allows different permissions to be set for all the Users of OPAS.

Areas of the Program

OPAS divides its overall functionality into two basic areas. The distinction between these two areas is important as it also defines the two purchase options and licenses for OPAS. OPAS can be purchased with a "basic" license that enables access to the primary program areas, or an "extended" license that enables access to other areas (specifically, Orchestra Personnel) as well.

The two basic areas of OPAS, and the specific program areas within them, are as follows. This list is presented in the order in which it is

covered in this document:

OPAS

- Calendar Section
- Dates Section (orchestra events and activities)
- Scheduling Section (holidays and other events)
- Artists
- Composers
- Works (Compositions)
- Score Publications
- Score Rental Agreements
- Score Perusal Orders
- Library
- Date - Works (Work performances)
- Address Book
- To-Do Lists or Checklists
- Marketing
- Expenses
- Instruments, Insurance and Cases

OPAS EXTENDED

- Guest Artist and Conductor contracts
- Personnel attendance and Work assignments
- Personnel payroll
- Payroll totals and analysis
- Tours

A more complete definition of each program area follows:

Calendar Area - provides a visual representation of an orchestra's season, viewable by the week, month or year. Allows further color-coding by Conductor, Venue, Project, Soloist and other activity details

Dates Area - the heart of the OPAS scheduling features. Provides complete information on any Orchestral activity including Conductor, Venue, Series, Project, Program, Timings, Instrumentation, Soloists and other information

Scheduling Area - used to indicate Holidays, tentative booking periods and other events

Quarterly Calendar - provides a visual representation of the Scheduling section for long-term planning.

Artists - stores complete information on soloists, orchestra members, substitutes, conductors and all other performers.

Composers - stores complete information on composers

Works - stores complete information on compositions, referenced against that work's composer. Includes movement names and timings, instrumentation, performance history, publisher information and other information

Score Publications - indicates the Publisher(s) and contact information for any given composition

Score Perusals - manages the borrowing of musical scores from Publishers or other sources

Score Rentals - manages the rental of musical scores

Library - the scores that comprise your orchestra's Library or permanent holdings. Edition, bowing, purchase price and other information can be stored.

Date-Works (or **Work Performances**) - tracks the specific attributes of each performance of a work, such as timings, movement orders, instrumentation, premiere and encore information, etc.

To - Do Lists or **Checklists** - allows creation and tracking of customizable to-do lists for orchestra activities. Lists can be sorted and combined by status, responsible person, task, etc.

Address Book - contains contact information for all entities in the OPAS database

Marketing - tracks ticket sales and prices and other marketing data for concerts

Expenses - tracks expenses for a given orchestral activity and allows for any categorization or source for expenses

Instruments, Insurance and Cases - used to log each instrument used and/or owned by the orchestra. Ownership, insurance, serial number, value and other information can be kept. Once instruments are created, they can be assigned to travel or storage cases

Guest Artist and Conductor contracts - allows for the creation of artist fees, itineraries and other information surrounding an artist's appearance with the Orchestra. Allows for printing of contracts & tracking of contract whereabouts.

Orchestra Personnel Attendance and Assignments - used to assign orchestra personnel to specific orchestra activities and works performed on that activity. Allows seating assignments and the tracking of attendance for a single activity, or a week, project or entire season.

Orchestra Personnel Payroll - used to calculate the wages due an orchestra member. Payroll can be calculated on a salary basis, a per-service basis, or a combination of the two. Pay rates and percentages can be assigned to artists, activities, and/or other conditions such as overtime.

Orchestra Personnel Payroll Totals - used to calculate the total wages for all orchestra members for a service, project, week or any other time period.

Tours - manages the travel, lodging and performance schedules for orchestral tours

Chapter

2



Chapter 2 Installing OPAS

Installation of OPAS is a straightforward process that should take no more than 15 minutes on each computer.

In addition to OPAS itself, it may be necessary to separately install the Artifax Report Writer that will enable you to generate documents and reports directly to your word processing program. See Chapter 24 for more information and instructions.

Further information regarding the installation of OPAS, including running OPAS in a SQL-Server environment, can be found in Chapter 24

What you Need

- IBM-compatible PC with at least a Celeron processor and 64MB of RAM. OPAS will not run on a Macintosh computer.
- A CD-ROM Drive (only to install the software on to your computer's hard drive)
- About 50 Megabytes of free hard disc space (this number can grow significantly depending on the size of your database)
- Windows(95 or 98, or Windows(NT operating system
- The Report Writer that comes with OPAS requires a Word-Processing program that can successfully open and manipulate rtf (rich text format) files. Known word processing programs that work with the Report Writer are: Word 95, Word 97, Word 2000, Word XP, AmiPro, WordPerfect version 8.0

If you are not sure that your computer meets these requirements, please contact Fine Arts Management.

Program Installation

There are three different ways of installing OPAS. Choose the method that best suits the needs of your organization.

Method One - Standard Client/Server network. In this configuration, OPAS is installed on to a central Server. The database also resides on that Server. Each computer in the organization (commonly called either a "Client" or a "Workstation") that wishes to use OPAS will do a "Workstation-Only" installation of the program. This takes up very little space on the workstation computer. OPAS is run centrally off of the main server installation. This configuration requires the least amount of long-term maintenance as (except in rare cases) updates to OPAS need only be applied to the server.

Method Two - Peer-to-Peer Network. This configuration is very similar to the standard Client/Server configuration; it differs only in that in a peer-to-peer network there is no dedicated or central server in the organization. Instead there is a collection of PCs, all networked together in order to share files or a printer. In this method, you will choose one computer to act as the server - it should be the most powerful one - and proceed just as with Method One

Method Three - "Stand Alone" computer. In this configuration, there is only one computer that uses OPAS. The entire program and database is installed on that computer.

OPAS installation configurations can be changed as the needs and equipment of your orchestra changes.

Once you have determined the installation method that best suits the needs of your organization, please turn to the appropriate page in this document to find the installation instructions.

Method One - Client Server Network

Before you begin, make sure of the following:

- 1 The Server meets the minimum requirements for OPAS (see the previous page)
- 2 The Server has sufficient hard disc space to house your database, particularly if you are using or installing a converted database (such as your orchestra's old OLIS(tm) database or another converted data source)

- 3 Everyone in the organization who will be using OPAS has full Read/Write/Delete access to the directory in which OPAS is installed
- 4 The directory is mapped to the same drive letter on all workstations

Installing OPAS on the Network

This will be a simple two-step process - first install OPAS and the OPAS database, reports, tools, etc on to the server, and then install OPAS on to each workstation or client computer that will use OPAS. You do not need to be physically sitting at the Server in order to install OPAS there. Provided you have the proper Read/Write/Delete access to the server, and a drive has been properly mapped as indicated above, the complete Server installation can be done from any workstation. The following directions assume such an arrangement

Step One - Install OPAS to the Server

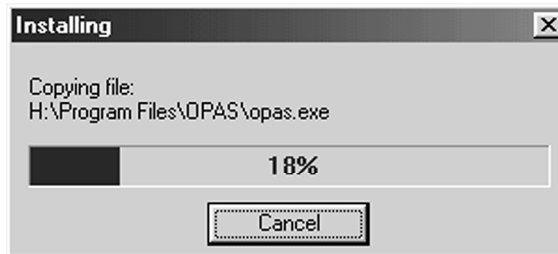
- Close all programs that are running on the computer, even those that run in the background, such as e-mail or scheduling programs.
- In the lower left-hand corner of the computer screen, click Start and then Run
- A dialog box will ask for the name of the program that you wish to run. Type "D:\setup.exe" (without the quotes) *where D: is the letter of the CD-ROM drive; if your CD-ROM drive is K, for example, type "K:\setup.exe"*
- The first screen will welcome you to the OPAS setup and verify the version of OPAS that is to be installed. Click Next to continue
- The next screen outlines the license agreement for OPAS. Read this agreement and click Yes to continue:
- The next screen asks for the destination directory. Since you are installing OPAS on to the server, click the Browse button to locate the mapped drive on the server. Once the proper location has been found, click the Next button to continue

- The next step is to specify which components of OPAS are to be installed. Since this is the initial full installation on to the server, make sure all four boxes are checked, and click Next to proceed.

In the options list below, select the checkboxes for the options that you would like to have installed. The disk space fields reflect the requirements of the options you have selected.

<input checked="" type="checkbox"/> Workstation Support Files (DLL, OCX)	8420 k
<input checked="" type="checkbox"/> Application Files (Forms, Standard Reports, Tools,...)	13738 k
<input checked="" type="checkbox"/> User Data (Access Rights, Export and Filter Queries,...)	3466 k
<input checked="" type="checkbox"/> Demo Database	7122 k

- The next screen verifies that you are ready to proceed with the actual installation. Click the Next button and OPAS will be installed to the server. This window and bar will mark the progress of the installation. As it can take time to write data



across the network to the server, the bar may proceed slowly.

When the installation is complete, you may be prompted to reboot your computer

Step Two - Install OPAS to individual workstations

On each computer that will use OPAS throughout the organization, the setup routine must be run in order to enable that computer to see OPAS on the server. Since OPAS and the database are both accessed on the central server, far fewer files need to be installed and the process is much faster.

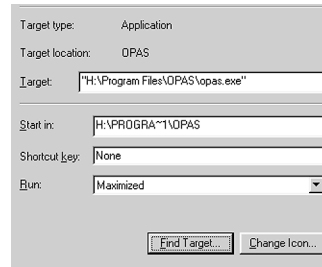
- Close all programs that are running on the computer, even those that run in the background, such as e-mail or scheduling programs.
- In the lower left-hand corner of the computer screen, click Start and then Run
- A dialog box will ask for the name of the program that you wish to run. Type "D:\setup.exe" (without the quotes) where *D*: represents the letter of the CD-ROM drive; if your CD-ROM drive is K, for example, type K:\setup.exe
- The first screen will welcome you to the OPAS setup and verify the version of OPAS that is to be installed. Click Next to continue
- The next screen outlines the license agreement for OPAS. Read this agreement and click Yes to continue
- The next screen asks for the destination directory. Click the Browse button to locate the mapped drive and directory on the server in which OPAS has already been installed. Once the proper location has been found, click the Next button to continue
- The next step is to specify the OPAS components to be installed. Since this is a workstation-only installation, check *only the first box* - "Workstation Support Files" - and click the Next button to proceed.

In the options list below, select the checkboxes for the options that you would like to have installed. The disk space fields reflect the requirements of the options you have selected.

<input checked="" type="checkbox"/> Workstation Support Files (DLL, OCX)	8420 k
<input type="checkbox"/> Application Files (Forms, Standard Reports, Tools...)	13738 k
<input type="checkbox"/> User Data (Access Rights, Export and Filter Queries,...)	3466 k
<input type="checkbox"/> Demo Database	7122 k

- The next screen verifies that you are ready to proceed with the actual installation. Click the Next button and the necessary OPAS will be installed to the workstation.

When the installation is complete, you may be prompted to reboot your computer



The OPAS installation routine will have placed an icon on to the computer desktop. To finalize the this workstation installation, right-click the mouse on the icon and choose the Properties menu. This will open the following window, in which settings should be verified:

- The **Target** field should point to the shared directory on the server. If it does not, click the Find Target button at the bottom of the window and locate it.
- The **Start In** field should likewise be set to the shared directory on the server.
- The **Shortcut** Key should be “None”
- The **Run** field should say “Maximized”

Click the OK button at the bottom of the screen when all these settings are accurate.

You are now ready to use OPAS on this workstation!

Method Two - Peer-to-Peer Network

As indicated above, this configuration is very similar to that of the Client/Server configuration.

Before you begin, make sure of the following:

- 1 You have chosen one of the computers in the network to act as a server. The main OPAS program, all utilities, reports, and the main OPAS database will be on this computer. This should be a very powerful computer and should meet the minimum requirements for a server as detailed on the first page of this chapter.
- 2 This computer is shared on the network, and everyone in the organization who will be using OPAS has full Read/Write/Delete

access to the directory in which OPAS is installed on that computer (the directory will most likely be C:\Program Files\OPAS)

- 3 The directory is mapped to the same drive letter on all workstations

Installing OPAS on the Peer-to-Peer network

This will be a simple two-step process - first install OPAS and the OPAS database, reports, tools, etc on to the first computer, and then install OPAS on to each workstation or client computer that will use OPAS. These steps are virtually identical to those for a Client/Server installation - see those instructions on page XXX for screen illustrations.

Step One - Install OPAS to the first computer

- Close all programs that are running on the computer, even those that run in the background, such as e-mail or scheduling programs.
- In the lower left-hand corner of the computer screen, click Start and then Run
- A dialog box will ask for the name of the program that you wish to run. Type "D:\setup.exe" (without the quotes) where *D*: is the letter of the CD-ROM drive; if your CD-ROM drive is K, for example, type "K:\setup.exe"
- The first screen will welcome you to the OPAS setup and verify the version of OPAS that is to be installed. Click Next to continue
- The next screen outlines the license agreement for OPAS. Read this agreement and click Yes to continue
- The next screen requires you to select the destination directory. Unless there is a compelling reason to do otherwise, choose the default directory
- The next step is to specify which components of OPAS are to be installed. Since this is the initial full installation on to the server, make sure all four boxes are checked and click the Next button to proceed.

- The next screen verifies that you are ready to proceed with the actual installation. Click the Next button and OPAS will be installed to the computer

When the installation is complete, you may be prompted to reboot your computer

Step Two - Install OPAS to other computers in the network

On each computer that will use OPAS in the organization, the setup routine must be run in order to enable that computer to see OPAS. Since OPAS and the database are both accessed on the "first computer" from the instructions above, far fewer files need to be installed and the process is much faster.

- Close all programs that are running on the computer, even those that run in the background, such as e-mail or scheduling programs.
- In the lower left-hand corner of the computer screen, click Start and then Run
- A dialog box will ask for the name of the program that you wish to run. Type "D:\setup.exe" (without the uotes) *where D: represents the letter of the CD-ROM drive; if your CD-ROM drive is K, for example, type "K:\setup.exe"*
- The first screen will welcome you to the OPAS setup and verify the version of OPAS that is to be installed. Click Next to continue
- The next screen outlines the license agreement for OPAS. Read this agreement and click Yes to continue
- The next screen requires you to select the destination directory. Click the Browse button to locate the mapped drive on the "first computer". Once the proper location has been found, click the Next button to continue
- The next step in the installation process is to specify which components of OPAS are to be installed. Since this is a workstation-only installation, *check only the first box - "Workstation Support Files"* - and click the Next button to proceed.

In the options list below, select the checkboxes for the options that you would like to have installed. The disk space fields reflect the requirements of the options you have selected.

<input checked="" type="checkbox"/>	Workstation Support Files (DLL, OCX)	8420 k
<input type="checkbox"/>	Application Files (Forms, Standard Reports, Tools,...)	13738 k
<input type="checkbox"/>	User Data (Access Rights, Export and Filter Queries,...)	3466 k
<input type="checkbox"/>	Demo Database	7122 k

- The next screen verifies that you are ready to proceed with the actual installation. Click the Next button and the necessary OPAS will be installed

When the installation is complete, you may be prompted to reboot the computer

Target type: Application
 Target location: OPAS
 Target: H:\Program Files\DPAS\opas.exe
 Start in: H:\PROGRAM~1\DPAS
 Shortcut key: None
 Run: Maximized
 Find Target... Change Icon...

The OPAS installation routine will have placed an icon on to the computer desktop. To finalize the configuration of this workstation, right-click the mouse on the icon and choose the Properties menu. This will open the following window, on which settings should be verified:

- The **Target** field should point to the shared directory on the “first computer”. If it does not, click the Find Target button at the bottom of the window and locate it.
- The **Start In** field should likewise be set to the shared directory on the server.
- The **Shortcut Key** should be “None”
- The **Run** field should say “Maximized”

Click the OK button at the bottom of the screen when all these settings are accurate.

You are now ready to use OPAS on this computer!

Method Three - “Stand Alone” computer

In this configuration, OPAS is not installed over a network, and resides in full on one PC. This method is often used to evaluate the software on one computer before sharing it permanently on the network.

Before you begin, make sure the computer meets the minimum requirements for OPAS (see the first page of this chapter)

These steps are virtually identical to those for a Client/Server installation - see those instructions for screen illustrations.

Install OPAS to the computer

Close all programs that are running on the computer, even those that run in the background, such as e-mail or scheduling programs.

- In the lower left-hand corner of the computer screen, click Start and then Run
- A dialog box will ask for the name of the program that you wish to run. Type “D:\setup.exe” (without the quotes) where *D*: represents the letter of the CD-ROM drive; if your CD-ROM drive is K, for example, type “K:\setup.exe”
- The first screen will welcome you to the OPAS setup and verify the version of OPAS that is to be installed. Click Next to continue
- The next screen outlines the license agreement for OPAS. Read this agreement and click Yes to continue
- The next screen requires you to select the destination directory. Unless there is a compelling reason to do otherwise, choose the default directory
- The next step is to specify which components of OPAS are to be installed. Since this is a full installation of the program, make sure all four boxes are checked and click the Next button to proceed.
- The next screen verifies that you are ready to proceed with the actual installation. Click the Next button and OPAS will be installed to the computer

When the installation is complete, you may be prompted to reboot your computer

Double-click the OPAS icon on your desktop to start the program

Demonstration Database Used

Regardless of the method used, when OPAS is installed for the first time, the Demonstration Database is also installed. This database has been created by Fine Arts Management and is not necessarily meant to reflect the actual operation of any single orchestra. Rather, it is intended to showcase the software's capabilities.

Every effort has been made to ensure that, when using OPAS demonstration database, the illustrations in this manual will match the screens on your computer.

Financial information (such as artist fees) has been intentionally falsified, and is provided only as a demonstration of the software's capabilities. Any resemblance between actual fees and the financial information contained in this document and the OPAS demonstration database, is purely co-incidental.

Starting OPAS

To start OPAS, double-click on the OPAS icon that was created during setup and placed on your computer's desktop

When OPAS starts, the login screen will appear. At the bottom of the screen are fields for the User Name and Password:



Login Name	DEMO
Password	****
Save Password	<input type="checkbox"/>
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

By default, OPAS ships with the Login name "Demo" and a password that is also "Demo." Click OK without typing anything to accept this Login name and Password.

Chapter

3

Chapter 3 Scheduling Features

OPAS provides several distinct program areas to manage the various aspects of an orchestra's schedule. Long-term planning, non-performance events, and complete rehearsal and concert schedules can all be seamlessly controlled and integrated, resulting in a reliable and unified data source for your activities.

Calendar Area

Overview

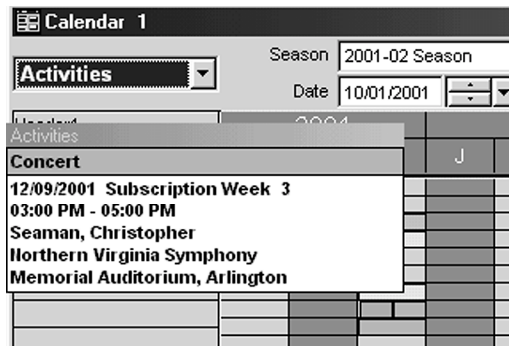
The Calendar area of OPAS provides a visual representation of an orchestra's activities by the Year, Month or Week.

To open the Calendar area, click the screen shot icon, or choose the Main Data | Dates | Calendar menu item.

The calendar page will open in the Year View, in the current season. The months of the year run along the top of the screen, and the days of the month run down the right side of the screen. When in the Year view, a "year" begins and ends as defined by the Season that appears in the top middle of the screen. See page 453 for more information regarding Seasons.

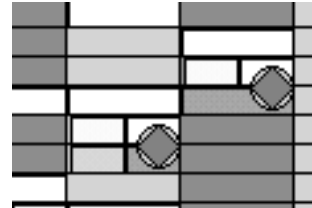
Each activity element is represented by a colored bar within its corresponding cell or box. If there is more than one activity element - for example, more than one soloist on a program - each element is represented by its own bar and color. When the mouse cursor is "floated" over any colored bar, the details of that activity will "pop up".

On the left side of



the screen, the drop-down list indicates the criteria by which the calendar is displayed. The calendar can be viewed by Venue, Conductor, Soloist, Project, Activity, Series or Orchestra. Choose any of these items and the Calendar will automatically refresh. Each criterion is color-coded, making it easy to reference its various components on the calendar screen.

You can also click any item in the far left list - doing so will cause its corresponding appearance in the calendar grid to be marked with a red diamond-shaped icon. For example:



The buttons and drop-down menus along the top of the screen are used to move to different seasons or specific dates. The "Level" field will indicate the "Date Level" displayed in the Calendar (for more information regarding Date Levels, see page 63).

The large buttons along the top right of the screen toggle between Year, Month and Week views. The large "sun" icon will reset the calendar at today's date, and the rightmost green icon will refresh the calendar data.



Exit the Calendar area by pressing the ESC key on the keyboard (located at the top left of the computer keyboard).

Dates Area

Overview

The Dates area of OPAS is the heart of its scheduling functions and is the area used to create and manage the orchestra schedule and activities. Virtually all printed schedules, program pages, worksheets and other reports that pertain to an orchestra's activities originate

from theDates area.

There are actually four distinct Dates areas within OPAS. They all look and function in the same way, and are provided to allow for four different levels of planning or security.

For more information about the uses of the four Dates levels, see page 63 later in this chapter

To open the Dates area of OPAS, click the icon shown, or choose the Main Data | Dates | Dates menu item.



The Dates area is divided into six sections or screens:

- **List** - shows a grid or List of all orchestra Activities or Dates that meet the criteria you choose
- **Main** - displays basic logistical information about a chosen activity
- **Program** - displays program and soloist information about a chosen activity
- **Additional Data** - a customizable screen that displays selected data that you define and choose
- **To-Do List** - a customizable production schedule or list of tasks for the activity in question
- **Documents** - links to external digital files related a chosen activity

As with other areas of OPAS, the Dates area opens in the "Basic Search" or "Green Screen" search mode (all fields on the screen appear tinted in green). To learn more about this search mode, see Chapter 21.

If the demonstration database is being used, simply press the F9 key and click Yes at the prompt to reveal all the Dates records (in other words, all the activities) on the List screen.

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area's contents. In Dates, that means all the Activities in the OPAS database. All orchestra rehearsals, concerts, auditions, run-outs, etc. are contained here. Many of the colors are user-definable; the color is set when the item is created.

List		Main		Program		Additional Data		To-Do List	Documents
Date	Weekday	Start	End	Activity	Project	Conductor	Venue		
12/03/2001	Mo	07:30 PM	09:00 PM	String Rehearsal	Subscription Week 3	Seaman, Christopher	Memorial Au		
12/04/2001	Tu	07:30 PM	10:00 PM	Rehearsal	Subscription Week 3	Seaman, Christopher	Memorial Au		
12/07/2001	Fr	07:30 PM	10:00 PM	Rehearsal	Subscription Week 3	Seaman, Christopher	Memorial Au		
12/08/2001	Sa	10:00 AM	01:30 PM	Dress Rehearsal	Subscription Week 3	Seaman, Christopher	Memorial Au		
12/08/2001	Sa	08:00 PM	10:00 PM	Concert	Subscription Week 3	Seaman, Christopher	Memorial Au		
12/09/2001	Su	03:00 PM	05:00 PM	Concert	Subscription Week 3	Seaman, Christopher	Memorial Au		

The columns on the screen can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column. The List tab sorts by Date as a default.)

See Chapter 20 for more information on working with grids such as the list tab

The List screen is be used extensively to execute Searches and Filters. See Chapters 20 and 21 for more information on searches and filters.

To reveal the details of any one activity, click the mouse once anywhere in that row, then click the Main tab at the top of the window. Or double-click the mouse anywhere in the desired row.

Main screen

The Main screen contains the vital logistical information for a concert such as the time, location, and conductor.

Project		Subscription Week 3		Activity		Concert		Level		1	
Date	Time	End	HMin	Svcs.	Week	Month	Year	PW	B	B3	Season
12/08/2001	Sa	08:00PM	10:00PM	02:00	02:00	1.0	01-49	12	2001	10	01-02
Series [1]		Code		Serie		Account No.		Venue		Memorial Auditorium Arlington	
		SatC		Saturday Classics I				Conductor		Seaman Christopher	
								Orchestra		Northern Virginia Symphony	
Text, Abbrev.											
Notes											
Dress		Black Tie		Add. Activities [0]							
Source		Dates		Code		Name					
Print Details		<input checked="" type="checkbox"/>		Services		<input checked="" type="checkbox"/>					

Project - The Project (subscription week, recording, tour, outreach, etc.) is the primary way in which OPAS organizes your orchestra's activities. Select the appropriate Project from a drop-down list of items that you define. See the Glossary of Terms for more information regarding Projects

Activity - indicates the specific event (Rehearsal, Dress Rehearsal, Concert, Audition, Sectional, Meeting, etc.) Select the appropriate activity from a drop-down list that you define. See the Glossary of Terms for more information regarding Activities.

Level - a security feature that allows you to hide certain dates from User's views, or to signify the status of the activity. For more information, see page 63 of this chapter.

The next line holds the **Date**, **Start / End** Time, and the number of **Services** the activity constitutes. (Note that Start and End times are optional fields)



The **Week**, **Month**, **Year** and **PW** fields are shaded in yellow. This indicates that the contents of that field cannot be changed and are in fact calculated by the other data on the screen. Those fields are as follows:

Week - the Calendar week of the Date in question. "01-49" indicates that the activity took place in the 49th week of 2001.

PW - this is the Production Week (or, if you prefer, the Performance Week), and indicates the week of the Season (as opposed to the Calendar week). A "1" in this field would indicate that the activity represented on this screen takes place in the 1st week of the season.

Season - the Concert Season for the Orchestra. See page 453 for more information regarding seasons.

Series grid - this grid allows organization of events by marketing series - that is, the subscription or ticket series in which this activity resides. Because the series is stored in a grid instead of a single field, one concert can belong to many different series.

Venue - the specific place of the Activity. Venues are created in the OPAS Address Book - see Chapter 8.

Conductor - conductor in "Last Name First Name" format. Conductors are created in the Artists area of OPAS - see Chapter 4.

Orchestra - the Orchestra performing at this activity. This field allows an orchestra to be subdivided into groups or sections (i.e. Pops Orchestra, Baroque Orchestra, Chamber ensemble, etc.). It can also be used for Choruses. Orchestras and ensembles are created in the Artists area of OPAS - see Chapter 4.

Text and **Abbrev** - open fields for other descriptive headings, and a Text Abbreviation

Notes - an open field for any additional information or explanation of the Activity or Date.

Dress - the concert attire for the activity.

Add. Activities - this grid is primarily used for personnel and payroll functions. It indicates that the activity shown on the screen is actually "counted" or thought of as two or more distinct activities. For example, a concert at 8:00 p.m. on Saturday may be recorded

and as such may be considered to be both a concert *and* a recording session.

Creating a New Activity

Click the New icon in the lower right-hand corner of the screen, or press the CTRL+N keys on your keyboard. This will cause the Main screen to become blank (white fields). New activities are created on the Main screen. (Also see Chapter 23 for step-by-step instructions on creating dates records).



The Copy icon is used to copy the single event on the Main screen to other date(s). In this way, the various rehearsals and concerts that make up a Project can be quickly created.



The New + Copy icon creates a new activity or date record based upon the one that is currently active (or showing on the screen). This can also be a quick way to build an entire Project.



The Save icon (or CTRL+S) saves changes. OPAS will always prompt you if you attempt to leave any screen without saving changes



The Delete icon (or CTRL+D) deletes the entire activity record.



The Undo/Restore icon (or CTRL+R) reverses the most recent change to the screen. This action must be implemented before the Save button is clicked



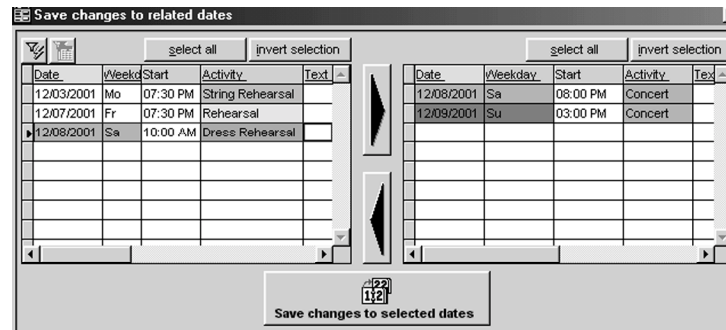
NOTE: Date / Time / Venue Overlap. When saving an activity in the Dates area, OPAS will check existing activities in the database. If there is any activity in the same venue, on the same date, at the same date Level, and with overlapping time(s), OPAS will display a message indicating that the Date, Time, and Venue conflict with a pre-existing activity. OPAS does not *prevent* activities from overlapping, it merely alerts the User when they do.



NOTE: In the Dates area, this message will often appear when saving changes or new information to an existing event:

Save changes to Related Dates?

"Related Dates" means "all other activities (rehearsals, concerts, etc.) that belong to the same Project and Season". This feature makes it easy to copy repertoire or soloist changes across all elements of a Project. If "Yes" is clicked, OPAS will display the following window:



The left pane of the window displays the "related dates" - all activities of the same Project and Season. Choose those activities to which you wish to save the change(s) (or click the "Select All" button) and then click the large "Save changes to related dates" button at the bottom of the window. In the example above, changes would be saved to the two concerts in the Project, but not the three rehearsals.

A deletion is considered a change, and will be likewise copied, and multiple changes can be copied at the same time.

Program screen

The Program screen contains all the Repertoire and Soloist information for the activity.

The top line of this screen replicates that of the Main screen. It indicates the specific Project, Activity, Date, Time(s), Week, and The

Production or Performance week associated with this event.

The No. and Title fields can be used to further describe a concert. The Title for a concert as it would appear in a brochure, for example, and where applicable, the number of the concert in a series or festival.

The fields can also, if needed, serve as a distinct level in the hierarchy between Project/Season and Date. For example, if an orchestra presents an annual Beethoven Festival, each "Beethoven Festival" in a Season would be its own distinct Project. It is likely, however, that each Concert within the single Project "Beethoven Festival" would have a different program. The "No." and "Title" fields can then be used to distinguish between the different concert programs within the Project.

Program Grid

The Program Grid in the middle of the screen contains all the works performed:

Program [4] <01:37:41>		No.	Title		
Order	Composer	Title	Title 2	Duration	
1	Rossini, Gioachino	BARBER OF SEVILLE: OVERTURE	Overture to «Il barbiere di Siviglia» [The Barber of	00:07:00	
2	Bruch, Max	CONCERTO, VIOLIN, NO. 1 IN G MINOR,	Concerto No. 1 in G minor for Violin and Orchestra	00:30:13	
3	Intermission,	INTERMISSION		00:20:00	
4	Brahms, Johannes	SYMPHONY NO. 4 IN E MINOR, OP.98	Symphony No. 4 in E minor, Opus 98	00:40:28	

The number in square brackets after the word "Program" at the top left of the grid ([4] in the illustration here) indicates the number of works (including intermission(s) and encores) assigned to this activity.

The number in the triangular brackets indicates the total program duration (<01:37:41> in the illustration here), including intermission(s) and encores.

The columns of the grid can be resized, or reordered, using the standard Windows conventions used in OPAS (see Chapter 20 for more information regarding grids).

The columns in the Program Grid are:

Order - Note that the Order column heading is light green. This indicates that the contents of this column can be directly changed to re-order the works in the program (including intermission(s)). To change the program order of a work, simply highlight the number and re-type the new order number. The other works will shuffle to accommodate the change. This is especially helpful when indicating rehearsal order as all printed reports and documents will reflect the program order as it appears in this grid

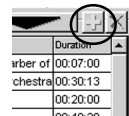
Title / Title 2 / Title 3 - The American Symphony Orchestra League established a convention for the OLIS software program in which any composition has two distinct titles. Title (or Title 1) indicates the master or reference title used by the system. Title 2 indicates the way in which the Title should appear when printed. See page 459 for more information on Titles. OPAS conforms to this and other American Symphony Orchestra League OLIS standards. Title 3 is reserved for foreign language translations, or can serve any other related use.

Duration - The length of the work. This can either be a calculated sum of the individual movements, or a number manually entered.

Select any single work on the program by selecting it within the Grid. A selected work is highlighted in yellow.

Just above the Program grid is a large arrow. Clicking this arrow (so that it points down) enlarges the Program Grid so that it occupies the entire lower portion of the screen. This feature reveals the entire program for exceptionally long programs (Pops programs, for example).

To add a work to the concert program, click the green "+" key at the top right of the grid. To remove a work from the program, click the red "x" key at the top right of the grid. This convention is used throughout all grids in OPAS.



From the resulting window, select first the desired composer and then the desired composition; the large arrow will add the work to the program. Chapter 20 contains more information regarding this sub-window.

Instrumentation information for this activity appears beneath the Program Grid. As individual works are highlighted in the Program Grid, this instrumentation data changes according to the work selected. If the mouse cursor is floated over any specific instrument section

(Flutes, for example), the exact instrumentation pops up

	Fl	Ob	Cl	Bn
SYMPHONY NO. 4 IN E	2	2	2	3
Soloists [0]	1,2/P			

(1,2/P in the example here). To view the maximum instrumentation (both orchestra and soloists) for the Activity, click the button that says "Show All" at the top of the Soloist Grid. The title of a work is replaced with the word "Max" in red, and the figures indicate the maximum numbers of musicians needed for all works on the program.

Soloist Grid

The Soloist Grid in the lower left hand corner of the screen displays all the artists or ensembles performing on this concert. Because a Soloist (or choir/ensemble) performs on a specific work (or works), that soloist must be assigned to a specific work. Therefore, first select the desired work in the Program Grid (highlighting it in yellow) and then assign the soloist. Add and remove Soloists using the green "+" and red "x" icons at the top right of the Soloist grid. You can assign any number of soloists to any number of works in the program.

The columns in the Soloist grid are:

Order - As with the Program grid, this number indicates the order of soloists, particularly for works that have vocal soloists, or Operas. Type the order number directly into the Order field, and OPAS will shuffle the other soloists into place

Soloist - the name of the soloist

Instrument - the instrument, voice type or ensemble type of the soloist

Notes - this can be used for any descriptive text you require, but is especially intended to indicate a particular role sung for the work, and/or to indicate an Artist debut.

Clicking the "Show All" button at the top of the grid will show all the soloists engaged for this program, regardless of the work on which they perform.

Other Participants Grid

The Other Participants Grid in the bottom right of the screen operates in the same way as the Soloists grid. The difference is that "Other Participants" are assigned to the entire Activity whereas "Soloists" are assigned to a specific Work or Works within the Activity. Therefore a Soloist would perform on the Mozart concerto, but a Host or Master of Ceremonies would be assigned to the entire Concert.

Other Participants can be:

- Choral Conductors or other Conductors
- Masters of Ceremony
- Artists who perform between the works on a Program
- Artists who are attached to all works on the program (solo recitals)

Other Participants are added just as soloists - click the green "+" button and select the desired entity from the list.

The list contains all the entities in the OPAS Address Book. This allows any entity to be added to an activity - a board member, a publisher, even another orchestra. See Chapter 8 for more information on the Address Book

Once added, clicking the Function column of the Grid can change the function or role of the individual or group. Note that this column has a light green heading, and when the box is clicked, a drop-down arrow appears.

Program Work Changes

One of OPAS's most significant features is that it allows the details of a specific piece of music to be changed only as those details pertain to a specific activity, regardless of the activity. This means that although a Symphony has three movements, the orchestra may perform only movements 1 and 2 at a concert. Two trumpets in a work may be replaced with 2 coronets, again, only for a single concert or set of concerts. To edit these details click the "Program" button just above the list of works to open the Dates/Works program area.

See Chapter 7 for more information on this critical OPAS feature.

Additional Data screen

OPAS provides the ability to create and store customized information for each distinct activity; information that is not already contained in other Dates area screens. For example, you may want to indicate if a concert was recorded or broadcast, record the estimated and actual attendance, note weather conditions or the corporate sponsor, etc. Similarly, you can record the names of jurors for auditions, the names of Stage Managers for Run-Out concerts, etc.

Each different type of Activity can have its own set of Additional Data.

To set the Additional Data for a specific activity type, choose the Background Data 1 | Activities menu item. Choose the appropriate activity, and click the Add. Fields tab to set the contents of the Additional Data screen for that activity.

See Page 422 for more information and examples of Additional Data screens.

To-Do List screen

OPAS provides the ability to create “To-Do” lists or task lists for any activity in the Dates area. As the name implies, the To-Do list organizes the myriad production details required for concerts or rehearsals, and the status of each individual item.

The To-Do List is extremely flexible, and can be used to track information in several different production areas: operations, stage production, artistic administration, and scores and library functions to name but a few.

Once checklists have been created for activities, they can be organized and searched by a variety of criteria such as the task itself, the person responsible, tasks that are not completed, etc.

Creating, editing and configuring OPAS to-do lists is covered in Chapter 9.

Basic Procedure and Notes

The basic procedure for setting up a To-Do List is:

- 1 Create the Status Levels that will be used for the items on the list (Background Data 2 | To-Do List Job Status menu item). These status items will be assigned to the individual tasks on each checklist
- 2 Create the List itself and store the List as a Template so all items on the list can be assigned to an activity at once. The template organizes the individual items on a to-do list by category, for example: Production (Concert Production, Run-Out Concerts, Audition), Repertoire (Score Distribution), or Administration (Contract processing). Individual items on the list can be associated with businesses in the OPAS Address Book (Chapter 8).
- 3 Assign the Template(s) to activities and edit the individual items as needed.

Additional notes about the To-Do List feature in the Dates program area:

Columns in the To-Do List Grid can be reordered by clicking on the column heading and dragging it into place.

There can be as many different templates as required, creating specialized task lists for specific events such as outdoor concerts, Pops concerts, Tour concerts, etc.

Examples of other operations information the To-Do List can track

- Programs confirmed
- Program information distributed
- Hall schedule confirmed
- Soloist & Conductor meeting scheduled
- Commission agreements signed (if applicable)

Examples of some Repertoire-specific information the list can track:

- Rental orders submitted
- Conductor Cuts/Markings received
- Scores distributed for bowings
- Marked/Bowed scores distributed
- Folders loaded

Multiple templates can be assigned to any single activity. When multiple templates are assigned, they are combined into one master list and individual items can then be re-ordered.

Click the green "+" key at the top of the grid to add individual items to the To-Do List .

To-Do List items can be included in any search on the database.

Viewing a Master List of all To-Do Items

Choose the Main Data | Todo List menu item. That will bring up a grid that can be sorted and filtered as elsewhere in OPAS. Furthermore, double clicking on any of the To-Do items will bring up a window in which the elements of the item or task can be changed.

Documents screen

The Documents screen is used to link external digital files to a particular activity in the OPAS database. See Chapter 19 for more information regarding the use of the Documents screen throughout OPAS.

Exit the Dates area by clicking the Close button in the lower left-hand corner of the screen, or by pressing the ESC key on your keyboard (located at the top left of your keyboard).

Scheduling Area



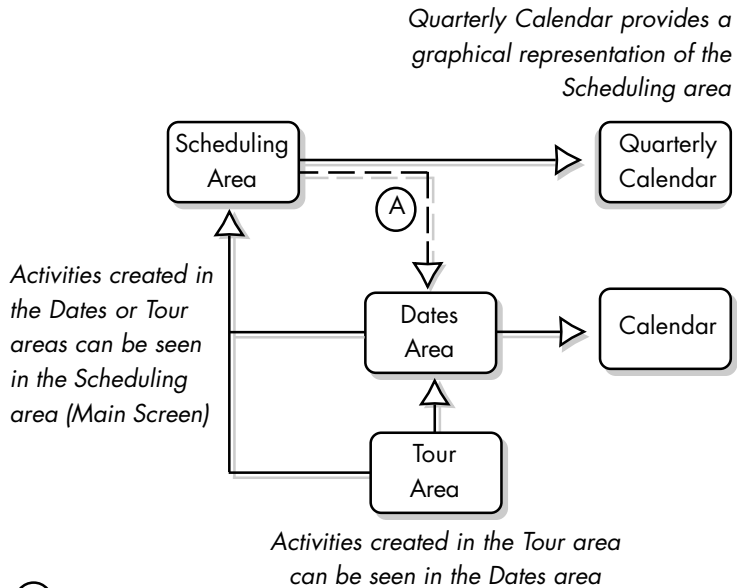
Note - depending on the OPAS version, or OPAS language translation in use by your orchestra, "Scheduling" may appear as the word "Days". In the demonstration database, the term "Scheduling" is used.

Overview

The Scheduling area of OPAS is used to record and control all days in a calendar year that may not yet have a specific activity assigned in the Dates area. Holidays, travel days, administrative functions, and other general calendar events can be stored here. The Scheduling section can also be used for general scheduling purposes - to block out a tour period, tentative future activities, or non-orchestral activities at the concert hall - for example. In this regard it can effectively be used as a starting point for scheduling future seasons and providing a general overview of the organization's calendar.

The Scheduling area links to the Dates area, and resides at the "top"

of the OPAS scheduling hierarchy. Activities that are created or scheduled in the Dates or Tour section of the software will automatically appear in the Scheduling section



(A)

The basic elements of an activity can be created in the Scheduling area, then viewed / modified / completed in the Dates area

As in the Dates area, there are actually four distinct Scheduling areas within OPAS. They all look and function in the same way, and are provided to allow for four different levels of planning or security when working with the general calendar.

For more information about the uses of the four Scheduling levels, see page 63 later in this chapter.

To open the Scheduling area of OPAS, click the Main Data | Dates | Scheduling... menu item

The Scheduling area is divided into two sections or screens:

- **List** - shows a grid or List of all days in a calendar year that meet the criteria you choose
- **Main** - displays basic logistical information about a single day, including a grid that displays all activities from the Dates area of OPAS that are scheduled for that day.

As with other areas of OPAS, the Scheduling area opens in the "Basic Search" or "Green Screen" search mode. To learn more about this search mode, see Chapter 20.

If you are using the demonstration database, type 2002 into the green Year field, and press the F8 key (or click the icon shown) to reveal all days in the calendar year 2002.



List Screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area's contents. In Scheduling, this is a chronological list of all days within the time period chosen.

The columns on the screen can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column. By default the List screen sorts by date)

The contents of the Weekday column will appear yellow if the day in question is a Monday through Friday, light red if it is a Saturday, dark red if it is a Sunday and orange if it is a Holiday.

The List can be used extensively to execute Searches and Filters. See Chapter 20 for more information on searches and filters.

To view the details about any single day, click on it anywhere in the

row and select the Main screen, or double-click it and the day will be represented on the Main screen:

Main Screen

The Main screen of the Scheduling area contains all the basic

Level	Source	Start	End	Project	Activity	Conductor	Venue	City	Address
1	Dates	03:00 PM	05:00 PM	Subscription Week 3	Concert	Seaman Christophe	Memorial Auditor	Arlington	

information about a single day in a calendar year. The Main Screen is used to record and indicate Holidays, tentative or possible activities, and/or Administrative and other events.

The Top row of the screen is identical to that in the Dates area of OPAS (see the previous section of this chapter).

The **Services** field can be used if this day includes orchestral activity and the number of Services for the activity needs to be calculated or tracked. It is an optional field

The **Status** field is used to indicate the status of any general event or activity that takes place on this day. It is an optional field. Note that the Status pertains to the day itself, and the contents of the Text field, and not to any orchestral activities on that day (which are displayed in the Dates grid at the bottom of the screen). To assign a new status, choose it from the drop down list.

To create a new status: click the Status button (the field label). This will open the Days Status window in which statuses are created and defining colors are assigned. The color will be represented on the

List screen, in the Status column.

The **Text** and **Notes** fields are used to describe any general event or Day information. These can be any manner of activities or events, and need not necessarily be musical or involve the orchestra. For example, you may wish to track Board Meetings, maintenance days, orchestra anniversaries, staff or musician meetings, etc. Use of these fields is optional.

The **Holidays** field will store the Name of the Holiday

Creating Holidays

To create a new Holiday, click the Holiday button (the field label). This will open the Holidays window in which Holidays are created.

To indicate that the Holiday is annual - that is, it happens on the same numeric date each year - assign the Day (1through 31) and Month (1through12) to the Holiday and click the Save button. Then click the Function button in the upper left-hand corner of the screen (screen shot). Choose the "Write Holidays" function and the Holiday will be written to each Year on the indicated Month and Date. Keep in mind this feature is for Holidays like Independence Day that always falls on July 4, and not Thanksgiving that is on the "fourth Thursday of the Month."



To assign a new Holiday to a calendar date, choose it from the drop down list

Creating new calendar years and days

Any year that is not "populated" - that is, does not have any entries in the Scheduling section - can be populated in one of two ways:

1. Seasons - whenever a new orchestral Season is created (see page 453 for more information), OPAS checks to see that the corresponding calendar years are populated in the Scheduling area. If they are not, OPAS automatically creates the appropriate new year(s) in the Scheduling area.

2. Click the New icon in the lower right-hand corner of the screen, or press the CTRL+N keys on your keyboard. This will open a new window that indicates a From and To year:



Simply choose the date range desired and click the OK button. OPAS will populate the Scheduling section for that time period.



Note: as this can be a lengthy process, especially when done over a network, it is advised that you populate no more than 3 years at a time.

Note: remember to re-assign annual holidays (described above) to newly created years.

Scheduling screen - Dates grid

The Dates grid at the bottom of the screen displays all Activities that have already been created for this day. These activities will have been created in either the Dates area or the Tours area of OPAS - the far-left column named "Source" will indicate the area in which the activity was created.

The columns within the grid can be resized or re-ordered. This particular subgrid cannot be resorted, and is ordered chronologically by the start time of the Activity.

Activities that appear in the Dates area of OPAS can be created here in the Scheduling area. To create a new activity, click the green "+" key in the upper right hand corner of the grid. This will open the

Days Schedule screen:

Date	Time	End	H/Min	Svcs.	Week	Month	Year	PW	B	B3	Season
12/16/2001	Sun	1:00PM	03:00PM	02:00	02:00	0.0	01-50	12	2001	11	01-02

Text, Abbrev.: Holiday Concert

Notes

Address

This screen contains the basic elements of activities in the Dates area. These elements can be created and saved here, and the program/conductor/venue information filled in the Dates area. As with general events, the use of this screen will vary greatly from orchestra to orchestra. It can be used to create:

Activities that do not involve performing or a program: Travel, Meals, Hotel Stays, Auditions, Orchestra meetings, etc.

Activities that may, or will, involve a program in the Future: The items in this area of OPAS can also be tentative or future events (Tour, Education concerts, Run-Outs, etc) for which a place should be held in the Orchestra' schedule, but for which the venue, conductor, program, etc. may not be known.

When this activity is then viewed in the Dates area of OPAS, the word "Days" will appear in the Source field, indicating its origin. The activity can be further edited in the Dates area.

See illustration next page

The screenshot shows the OPAS Scheduling interface. At the top, there are tabs for 'List', 'Main', 'Program', 'Additional Data', 'To-Do List', and 'Documents'. Below these, there are dropdown menus for 'Project' (Family Concerts 01), 'Activity' (Concert), and 'Level' (1). A table displays scheduling details: Date (12/16/2001), Time (01:00PM), End (03:00PM), HMin (02:00), Svcs. (02:00), Week (01-50), Month (12), Year (2001), PW (11), B3, and Season (01-02). Below this is a 'Series [0]' table with columns for Code, Serie, and Account No. To the right of the series table are dropdown menus for Venue, Conductor, and Orchestra. The 'Text, Abbrev' field contains 'Holiday Concert'. Below that is a 'Notes' text area. At the bottom, there is a 'Dress' dropdown menu with 'Source' and 'Days' options, and an 'Add. Activities [0]' table with columns for Code and Name. The 'Print Details' checkbox is checked.

Exit the Scheduling area by clicking the Close button in the lower left-hand corner of the screen, or by pressing the ESC key on your keyboard (located at the top left of your keyboard).

Quarterly Calendar

Overview

The Quarterly Calendar provides an overview that is used for planning purposes, and to obtain a more concise view of a calendar year. Just as the Calendar area of OPAS displays information from the Dates area (see earlier in this chapter), the Quarterly Calendar displays information that originates in the Scheduling area (see the previous part of this document for more information).

The two key differences between the Calendar and Quarterly Calendar are:

The Quarterly Calendar is designed for speed of display and navigation. As such, the use of color and display options are kept to a minimum

Information can be typed directly into the Quarterly Calendar, making long-range planning and scheduling easier to enter.

To open the Quarterly Calendar, click the Main Data | Dates | Quarterly Calendar menu item

The Quarterly Calendar displays a column for each distinct month within a (calendar) year. Because the Quarterly Calendar is tied to the Scheduling area of OPAS and not the Dates area, its display is tied to the standard Julian calendar, not to your orchestra's season calendar.

The navigation buttons along the top of the screen provide navigation as in the Calendar area. Choose a Year and Month combination or use the "VCR" buttons to scroll backward and forward one month at a time (the single-arrow buttons) or one year at a time (the double-arrow buttons).

Information can be directly typed into the Quarterly calendar. Click the Mouse into any field on the Quarterly Calendar, and enter the desired text. Any text entered in the Quarterly Calendar will become the Name or Text of a new entry in the Schedule area

December 2001	
1	Sa
2	Su
3	Mo
4	Tu
5	We
6	Th
7	Fr
8	Sa
9	Su

Quarterly Calendar

Opera load-in for Nutcracker

*Scheduling
area - Main
screen*

Scheduling [Tu, December 4, 2001]

Date: 12/04/2001 Tu 01-49 12 2001 10 Season: 01-02

Svcs: 0.0 Status: [dropdown]

Text: Opera load-in for Nutcracker

Notes: [text area]

The day/date for Holidays in the Quarterly Calendar will appear in orange (see the previous section of this document for more information on Holidays).

Double-click any single day in the Quarterly Calendar to open that day in the Scheduling area of OPAS.

“Levels” in scheduling areas

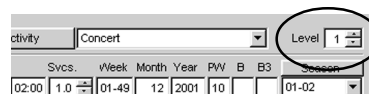
Overview

OPAS provides the ability to segregate information entered in either the Dates area or the Scheduling area into one of four distinct levels. These different levels provide both an easy means to control User access to schedules, to separate tentative activities, and to facilitate long-term planning.

Use of the levels is optional, and with the exception of the operations noted, the significance of any single level or rank is arbitrary - each orchestra will define and use the levels in a manner that best suits its administration.

Dates program area levels

Each activity created in the Dates area of OPAS is assigned a level when it is created. The level of the activity appears in the upper right-hand corner of the Main screen:



To better organize, and provide security between, activities of different levels, OPAS adheres to these rules of operation:

1. By default, the level number of an activity is the level area in which it was created. OPAS assigns the number when the activity is saved. So, for example, an activity created in the Dates Level

- 2 program area will have a level of 2 by default
2. Levels can be manually changed between levels 1, 2 and 3 simply by typing in the new number.
 3. An activity cannot be manually assigned the "Dates Planning" level - only activities specifically created in the Dates Planning area (outlined below) will be of that level
 4. Dates Planning activities can, however, be re-assigned a "lower" level (1, 2 or 3) by manually entering the desired level.
 5. Events created in the Dates Level 2 and/or Dates Level 3 program areas can be viewed in the Dates area of OPAS (but, as per item one above, they cannot be created there). See below for further details.

Calendar ...
Quarterly Calendar ...

Scheduling ...

Dates ...

Date Works ...

Scheduling Level 2 ...

Dates Level 2 ...

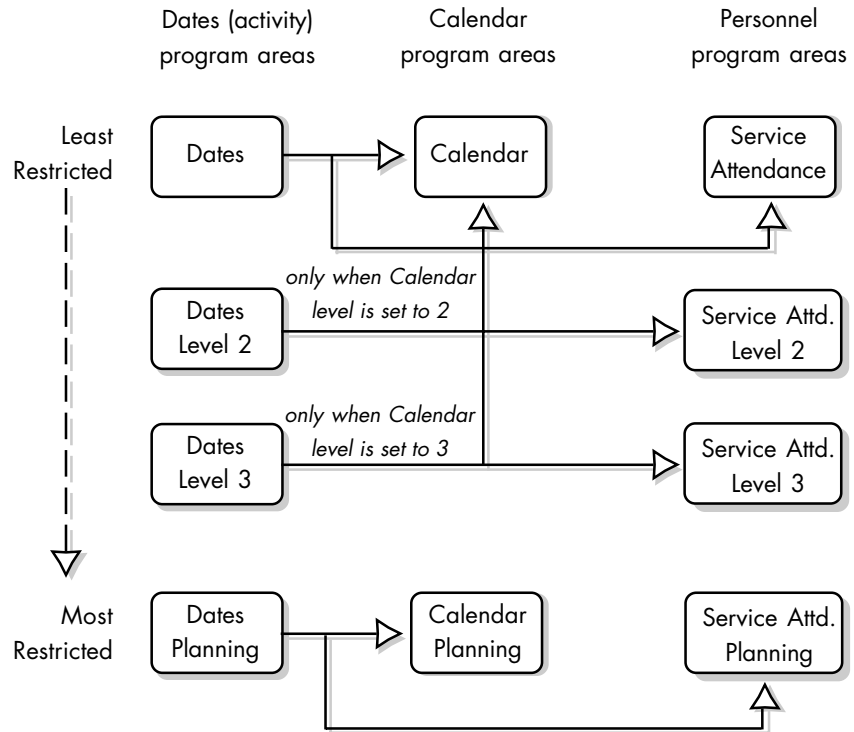
Scheduling Level 3 ...

Dates Level 3 ...

Calendar Planning ...

Scheduling Planning ...

Dates Planning ...



As events or activities in the Dates Planning level are set to Level 1, the activities become available in the Date/Works, Calendar and Personnel program areas.

Dates Levels defined

Level 1 - the most universal and accessible of levels. Activities at this date level are created and viewed in the Dates area of OPAS, and in fact "Level 1" is implied when referring to events in the Dates area. Events at this level are assumed to be confirmed, and can be viewed by all Users of OPAS. Events of this level comprise the orchestra's basic or public schedule. Most printed schedules are designed for level one activities.

When a new activity or event is created in the Dates area, it is assigned level one by default.

Level one events or activities can be displayed in the Calendar area, when the Calendar level is also set to one (the default for the Calendar).

Orchestra Personnel attendance can be assigned and payroll information calculated to level one activities (see Chapters 15-17).



Only Level one events or activities will be included in the Date-Works area of OPAS (see Chapter 7).

Only Level one events or activities will appear in the Dates screen of the Works program area (see Chapter 5), and the Dates screen of the Artists program area (see Chapter 4).

Level 2 - Activities of this date level are considered to be more tentative and/or confidential than those of Level 1, but the exact definition of "tentative" and "confidential" will vary from orchestra to orchestra. Level 2 activities are created, edited and viewed in the Dates Level 2... area (under the Main Data | Dates menu item). Activities having this date level might mean, for example, that the date itself is confirmed, but the program is not, or the soloist(s) is not, or that the music director has not yet signed off on the program.

Only schedules generated from within the Dates Level 2 program area will contain events or activities of that rank.

There can be multiple Level 2 activities on the same date (to indicate, for example, two possible programs under consideration)

Level 2 events or activities can be displayed in the Calendar area, but only when the Calendar level is set to 2 (at the top of the Calendar screen).

Level 3 - Activities of this date level are assumed to be more tentative and/or confidential than those of both Level 1 and Level 2, but the exact definition of "tentative" and "confidential" will vary from orchestra to orchestra. Level 3 activities are created, edited and viewed in the Dates Level 3... program area (under the Main

Data | Dates menu item). Activities having this date level could mean, for example, that the date or program or soloist is not yet confirmed.

There is no intrinsic difference between Level 2 and Level 3; Level 3 does not necessarily have to mean “more confidential” than Level 2.

Only printed schedules generated from within the Dates Level 3 will contain events or activities of that rank.

There can be multiple Level 3 activities on the same date (to indicate, for example, two possible programs under consideration)

Level 3 events or activities can be displayed in the Calendar area, but only when the Calendar level is set to 3 (the drop-down field at the top of the Calendar screen).

Dates Planning - Activities of this date level are the most confidential in OPAS. As the name suggests, the Dates Planning area is designed expressly for the creation of an orchestra's future season(s) and specific activities.

“Dates Planning” events are created, edited and viewed in the Dates Planning program area (under the Main Data | Dates menu item). Only schedules generated from within the Dates Planning will contain events or activities of that rank.

Dates Planning events or activities are displayed only the Calendar Planning area of OPAS. See “Calendar Planning” on page 69.

Orchestra Personnel attendance and payroll information can be assigned and calculated to activities of this level.



Note: When an event in the Dates Planning level is set to level 2 or 3, then that event is only visible in the corresponding personnel areas of OPAS (Service Attendance and Payroll areas). That is, personnel can only be assigned to a Level 2 Date in the Service Attendance Level 2 program area. The Date level dictates the

Service Attendance or Payroll level.

Activities can be created in the Dates Planning section, programs created and soloists assigned. However, as the Dates Planning Section is expressly intended for confidential future planning, any works or artists assigned to activities will not appear in the performance history of the respective work or artist (unless the User has access to the Dates Planning Section).

To move an activity from the Dates Planning section to any of the other Dates levels, click the function icon at the top left of the OPAS screen and select the "Assign Dates Level" function. This can be done for one activity at a time, or for a group of activities. In the latter case, the function is run from the List screen of the Dates Planning area. The activity in question will then be available in the designated Dates section.



Notes on schedule levels

All printed reports and schedules in OPAS exclude information from the Dates Planning Section. This of course excludes reports that are generated from the Dates Planning Section itself.

As mentioned above, you can view events of Level 1, 2 and/or 3, all within the Dates program area of OPAS. This is done by modifying the filter in which the Dates program area opens. (see Chapter 21, "Finding Data", to learn more about the filter mode). When the Dates area of OPAS opens, the "green screen" filter mode automatically places the number "1" in the Level field:



This indicates that, whatever other criteria are requested in the filter, only activities of date level one will be included in the results.

Simply delete the number "1" to return activities of all 3 levels. To include only two of the three levels, use the Advanced Filter (see Chapter 21).

To change the level of an event or activity, regardless of the section in which was created, click the Function icon along the top of the OPAS screen and select the "Change Planning Level" function.



This function will prompt you for the level to which the activity should be changed. Events can be changed one at a time, or for a group of activities. In the latter case, the "Change Planning Level" function is run from the List screen. The activity in question (or all activities displayed on the List screen) will then be available in the designated program area of OPAS.

Calendar Planning

Identical in function to the Calendar program area of OPAS, this area provides a graphical overview of all Activities that are generated in the Dates Planning section.

The large buttons along the top of the screen will toggle the Calendar display between Year, Month and Week views. Specific Seasons or Dates can be entered in their respective drop-down menus. The far-left drop-down menu will change the color-coding of the Calendar display to reflect the chosen value.

Archives

Overview

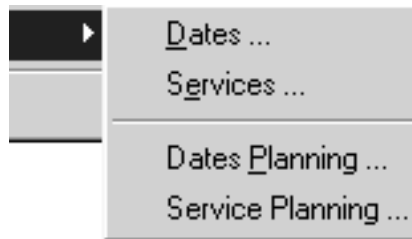
OPAS provides the means to move activities or events into the Archives. This function is provided primarily for rehearsals and ancillary events that, because financial or other critical data is assigned to them, should be preserved in the database, but are not needed on a typical basis. Rehearsals, auditions, "free days," and meetings are examples of activities that could be archived. It is possible that the archive functions of OPAS are not required until the

database has been in use for several years.

Archived events are stored separately from those activities in the Dates area (and related Dates Level 2, Dates Level 3, and Dates Planning) of OPAS. This means that archived events are *not* included in standard searches and filters, aiding the speed and efficiency of the program.

The term “Archives” in OPAS may differ from the traditional meaning of the term in that historical concerts in OPAS are not archived. Archived activities in OPAS adhere to these rules of operation:

1. Archived events do not appear when viewing the performance history of a composition in the Works | Dates area of OPAS (see Chapter 7). For this reason, do not archive historical concerts, regardless of how long ago they may have occurred, so as to preserve an accurate composition performance history.
2. Archived events do not appear when viewing the performance history of a soloist or conductor in the Artists | Dates area of OPAS (see Chapter 4). For this reason, do not archive concerts, regardless of how long ago they may have occurred, so as to preserve an accurate artist performance history.
3. As mentioned above archived events do not appear in the Dates area (and related Dates Level 2, Dates Level 3, and Dates Planning areas), nor are they included in standard reports and data exports.



OPAS provides archiving functions in each of these program areas, primarily for these purposes:

Dates - archive activities that are no longer needed on a regular basis, but should be preserved in the

database because of related financial, contract, or other data

Services - archive old personnel or substitute service details to speed, (or perhaps better secure), the Servicing area of OPAS

Dates Planning - archive planning data for future reference

Service Planning - archive planning data and payroll calculations for future reference

Archiving Information in OPAS

Regardless of the program area in which data is Archived, the process is the same:

1. Copy the desired record to the Archives
2. Delete the original record

OPAS makes this a two-step process to ensure that data is not unintentionally deleted, and to provide the opportunity to remove financial or contract information from the original record.

This example uses the Dates program area, but the steps are the same for any of the other three program areas indicated above.

First, select the activity, or activities, to be archived

Next, click the function icon and choose the "Copy to ARCHIVE" function. The active record(s) will be replicated in the corresponding Archive area of OPAS. This action results in two identical records: the original, and the archive.



With the copy created in the Archives, it is now safe to delete the original record. OPAS will prompt you if contracts or other data associated with the event must be deleted or moved first.



NOTE - remember that the event and servicing archive functions are separate and distinct functions. This means that:

If an event is archived, and that event has orchestra personnel services assigned to it, those services are not automatically archived. The services must be manually archived using the related function in the Services program area of OPAS (see Chapter 16)

However, if personnel assignments are archived in the Services area of OPAS, the associated event is automatically archived in the Dates area.

Activities that have contracts (either artist contracts, score rental contracts, or other contracts) or personnel services (staff or substitute) assigned to them can be archived, but cannot be deleted until the associated contracts/services are either modified or deleted.

Chapter

4

Chapter 4 Soloists, Conductors and Ensembles

Overview

The Artists program area of OPAS keeps track of your orchestra itself (and any chamber ensembles, pops orchestras, affiliated choruses, etc), all the soloists and conductors who perform with your orchestra, and the musicians who comprise your orchestra. It also contains any other orchestras, choirs and ensembles used in the OPAS database.

Contact information, personal information and a comprehensive performance history are all stored in this program area.

Artists can also be viewed in the OPAS Address Book area - the Address book is used to manage contact information for all entities in the database - venues, publishers, agencies and individuals. See chapter 8 for more information regarding the Address book.

See chapter 14 for more information regarding artist performance contracts.

To open the Artist area of OPAS click the icon shown, or choose the Main Data | Artists menu item.



The Artists area is divided into seven sections or screens:

- **List** - shows a grid or list of all Artists that meet criteria you choose
- **Main** - displays the main contact information about the Artist or Ensemble
- **Contacts / Agents** - displays alternate contact information and manager information
- **Additional Data** - a customizable screen that displays selected data that you define and choose

- **Personal Data** - displays information specific to orchestra members and substitutes
- **Dates** - displays all concerts and rehearsals to which the Artist or Ensemble has been assigned
- **Documents** - links to external digital files related to this activity

As with other areas of OPAS, the Artists program area opens in the "Basic Search" or "Green Screen" search mode. To learn more about this search mode, see Chapter 21. If the demonstration database is used, simply press the F9 key and click Yes at the prompt to reveal all the Artist records in this area

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area's contents. In the Artists section, that means all individual soloists and conductors, ensembles, orchestras and choirs.

The columns on the List screen can be:

- * resized (float the mouse cursor between column headings and drag to the right or left)
- * re-ordered (click on a column heading and drag it to the right or left)
- * re-sorted (click on a column heading to sort the list by the contents of that column. The List tab sorts by the Artists Last Name (or "Company Name" in the case of an ensemble) as a default

See Chapter 20 for more information on working with grids such as those on the List screen.

The List screen is used extensively to execute Searches and Filters. See Chapter 20 for more information on searches and filters.

To see the details of any one artist, click the mouse once anywhere in that row, then click the Main tab at the top of the window. Or

simply double-click the mouse anywhere in the desired row.

Main screen

This screen contains all the basic information about an artist or ensemble. It can store as much or as little information about each artist as is required or known - some of the information on this screen is better suited for soloists, and other for members/substitutes of the orchestra or ensemble

The screenshot shows a software interface for managing artist information. The main form contains the following fields:

- Co. / Last Name:** Wetherbee
- First Name, Code:** Rhonda, RW
- Name 3, Name 4:** (Empty)
- Address 1:** 85 Randolph Place
- Address 2:** Apt. 3409
- City:** Arlington
- State, Zip:** VA, 22202
- Country:** United States of America
- Title:** Ms.
- Salutation:** (Empty)
- Notes:** Concertmaster
- Order:** A01
- Activated:** (Checked)
- Mark:** (Empty)

There are three floating windows on the right side:

- Groups [2]:**

Group	Code
Orchestra Member	NVSO
Soloist	SO
- Contact Numbers [3]:**

Order	Number	Type	Text
1	(703) 555-1212	Phone	Home
2	rwetherbee@aol.com	Email	
3	(703) 555-3220	Phone	Cell
- Instruments [2]:**

Instrument	Code
Violin 1	V1
Violin	V1
- Functions [0]:** (Empty table)

Company / Last Name - The Last Name or organization name (in the case of a choir, ensemble or orchestra)

First Name / Code - The Artist's First Name and Code or abbreviation (such as the Artist's initials)

Name 3 - An additional Name, if required - this can be used for maiden name(s) married name(s), name as it should appear in a program, etc.

Name 4 - An additional Name, if required - - this can be used for maiden name(s) married name(s), name as it should appear in a program, etc.

Address 1 / Address 2 / City / State / Zip / Country - The personal address of the Artist in standard U.S. format.

Title - An optional formal Title or prefix (Dr., Ms., Maestro, etc)

Salutation - A list of Salutations that are used for mail merges or letters

Notes -an open field for any additional information

Order - The two order fields are used for Orchestra Members or Substitutes to indicate the chair/stand seating order. See Chapter 15 for more information on seating order and seating rotation.

Mark - Used to temporarily mark a field for use during Searches and Filters, or to separate certain records

Activated - This toggle allows an artist to be marked "inactive"; searches, reports and filters can be tailored to avoid all artists thus marked.

Group grid

This Grid indicates the Address Group(s) to which the Artist belongs. Any Artist can belong to more than one group - a Conductor could also be a Soloist, for example. Groups are added and removed with the green "+" and red "x" buttons. The group highlighted in yellow is considered the Artist's Main Group. Any group can become the main one by selecting it in the grid, and clicking the Set to Main button.

See page 425 for more information regarding Address Groups

Contact Numbers Grid

This grid contains all the phone, fax, email and web site contact numbers for the Artist or Choir / Orchestra. Each number consists of an:

- Order - the order in which the number appears in the grid. To change the order of numbers, simply highlight a number and type

the new desired value. OPAS will then automatically re-sort the grid around that typed number.

- Number - the phone number, email address or web site address itself
- Type - "Phone", "Fax", "Email", or "Web Site"
- Text - any (optional) short, descriptive text for the number ("Home", "Pager", "Studio", "Office", etc.)

To add a contact number, click the small "blank page" icon at the top right of the grid and enter the desired elements of the number. When in the Numbers Grid itself (that is, actively entering or editing a phone number), add a new number by holding down the CTL key and pressing the down arrow on the keyboard.

Sending email from OPAS

If the contact number in question is an email address, OPAS can launch your default email program and insert that email address into the "To:" field.

Simply click on the email address in the Contact Numbers grid, and the "Send Email" button will become active: screen shot. Click that "Send Email" button and your default email program will be launched.

Launching web sites from OPAS

If the contact number in question is a web site, OPAS can launch your default web browser and go to that web site.

Simply click on the internet address in the Contact Numbers grid, and the "Open URL" button will become active: screen shot. Click that "Open URL" button and your default web browser will be launched and go to that site.

Instruments Grid

This grid lists the instrument(s) played by the Artist. In the case of a chorus or ensemble, it indicates the type of chorus (SATB, Children's Chorus, etc) or ensemble.

Add and remove instruments with the green “+” and red “x” buttons. The instrument highlighted in yellow is considered the Artist’s Main Instrument. Any instrument can become the main one by selecting it in the grid, and clicking the Set to Main button.

See page 437 for more information on Instruments and Instrument Groups

Functions Grid

This Grid is used for orchestra personnel and is primarily used in European orchestra systems. It indicates the class, level or professional category of the musician. This professional category can be used to influence payroll calculations and/or service counts.

Creating an Artist record

To create a new Artist or Ensemble, click the New button in the lower right-hand corner of the Main screen (or press CTRL+N on your keyboard). This will cause the Main screen to become blank (white fields). New artists and ensembles are created on the Main screen. Type the desired information about the artist or ensemble. The company or last name, and address group are the only required fields.



The New+Copy button will create a new artist record based upon the currently active artist record.



To permanently remove an Artist or Ensemble, click the Delete button in the lower right-hand corner (or press the CTRL+D keys on your keyboard). Artists or Ensembles attached to an activity (such as the soloist on a concert) or a contract cannot be deleted from the OPAS database until they have been removed from that activity or contract.

The Save icon (or CTRL+S) saves changes. OPAS will always display a prompt if you attempt to leave any screen without saving changes



The Undo/Restore icon (or CTRL+R) reverses the most recent change to the screen. This action must be implemented before the Save button is clicked.



Contacts/Agents screen

The Contacts/Agents screen organizes the Agents for a soloist, the Orchestras to which an Artist may belong, conversations or contacts you may have with the artist, additional residences, and Contact People (publicists, etc) for the Artist.

Each set of data is kept in its own Grid.

Contacts grid - This grid stores any series of contacts you may have had with the Artist. It could track discussions regarding soloist appearances, orchestra member hiring, etc.

For each entry in the grid, indicate its Date, Type ("P" for "Phone" or any code of your own choosing), and a Text description or note.

Orchestra grid - This grid lists the Orchestras and/or Choruses to which this Artist belongs. Examples could include University affiliations, past orchestra memberships, chamber or other ensembles, etc.

Contact Persons grid - This grid contains the Names and contact information for the people associated with this artist. This information will be used almost exclusively with Ensembles to indicate the staff for that organization - Executive Director, Music Director, administrative staff, etc.

To add a new contact person, click the green "+" icon to bring up this screen. The fields match (but are not linked to) those on the Artist main tab:

See illustration next page

Addresses/Contact Persons [Hemphill Barry S.]	
List	Main
Last Name	Hemphill
First Name	Barry S.
Salutation	Mr.
Position	Music Director
Phone	703.556.1123
Fax	
E-Mail	BarryH@att.worldnet
Mobile	915.112.3321

Residences- This grid stores any other addresses for the Artist, such as summer homes, overseas addresses or alternate mail addresses.

Agents - This grid stores the contact information for the artist's manager, agent, publicist, etc. Each manager or management company will have been created in the Address Book section of OPAS (see Chapter 8), and this grid will link the artist to that Address Book entity. A single artist can have any number of different managers or contacts (from the same and/or different companies), and likewise a single management company can be associated with any number of artists.

To assign a manager or agent to the artist, click the green "+" icon at the top right of the grid. This action will display a sub-window containing each entity in your OPAS Address Book that is assigned to the Address Group "Artist Manager" (see page 423 for more information regarding Address Groups). Simply select the desired agent, and click the large right-pointing arrow, or double-click the agent's name. Click the Close button (bottom right) of this sub-window to return to the Artist's Contacts/Agents screen.

To further refine the relationship between the Artist and the Manager, double-click the name of the manager in the grid, or click the "Agents" button at the top left of the grid. This will open the Addresses/Agent window in which the actual person at the agency or

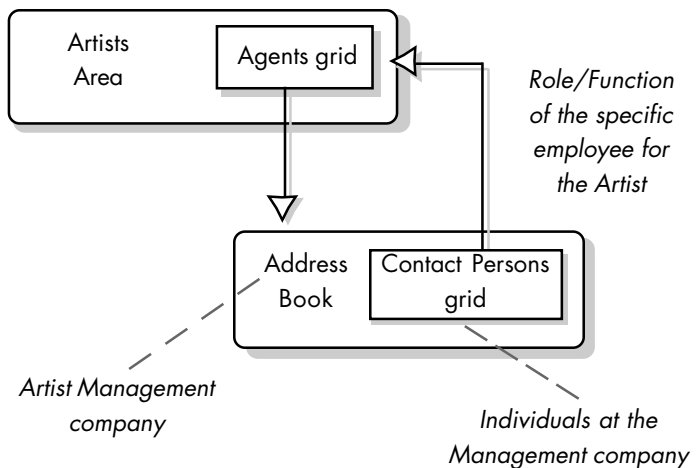
company is selected, and his/her relationship to the Artist ("Manager", "Producer", "Contract Processing", "Servicing Agent").

The screenshot shows a form with three fields: "Agent" (set to "Fine Arts Management"), "Capacity" (set to "Manager / Booking Agent"), and "Contact Person" (set to "Rhodes Amy"). Below the form is a table titled "Agents [1]" with the following data:

Co. / Last Name	First Name	City	Capacity	Contact Person
Fine Arts Management		Brooklyn	Manager / Booking Agent	Rhodes Amy

As mentioned above, the people who work at the management company will be specified in the Address Book entry (in the Contact Persons grid) for that management company.

To quickly go to the management company or agency (to look up a phone number, for instance) simply click the Agent button next to the company name and the OPAS Address Book will open to that entry.



Additional Data screen

OPAS provides the ability to create and store customized information for each of the different types of Artists in the database. A discography for the artist, special piano needs, program credits, travel preferences, etc. can all be stored. Additional Data fields are for information not already included on any other screen in the program area.

Each different type of Artist (Orchestra member, soloist, conductor, substitute) can have its own set of Additional Data. To set the Additional Data for a specific activity type, choose the Background Data 1 | Address Groups menu item. Choose the appropriate artist type from among the Address Groups, and click the Add. Fields tab to set the contents of the Additional Data screen for that activity.

See Page 422 for more information and examples of Additional Data screens.



Note that the Additional Data tab displays the information that pertains to the Artist's Main Group. For example, if an Artist is both a Soloist (a violinist, for example) and a Conductor, the Additional Data tab will reveal the fields that correspond to whichever group is "Set to Main" (highlighted in yellow) on the Artist's Main tab.

Personal Data screen

The Personal Data screen stores information for orchestra members or substitutes. These fields are self-explanatory and can be used (or not used) to the extent required. Many of these field names or labels can be changed to better reflect the information you need to store.

The Personal Data screen has a unique security feature. As this screen can contain confidential information, it can be hidden from the view of most OPAS Users. However, the birth/death and nationality information for Soloists, especially those who performed with your orchestra years ago, may need to be public information. For this reason, the Birth and Death sub-windows on the right of the screen can be viewed independently of the other information. See Chapter 24 for more information on Users and permissions.

Dates screen

Each time a soloist, conductor, chorus or orchestra is assigned to a concert, rehearsal or other service in the Dates section, that activity will be listed on this screen. This creates a comprehensive performance history for the artist or ensemble.

The pertinent information regarding each of these activities is contained in columns. The Function column indicates if the artist or ensemble appeared as a conductor, soloist or "other participant" - see Chapter 3 for more information regarding the assignment of artists to activities.

Each of the columns in the grid can be:

- sized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)

This screen sorts in reverse chronological order (the most recent activity is the top row of the grid).

To view the details of any activity to which the artist has been assigned, right-click the mouse button on that activity, and choose "Dates" from the resulting pop-up menu.

Documents screen

The Documents screen is used to link external digital files - word processing files, digital images, digital sound files, etc. - to a particular artist in the OPAS database. See chapter 19 for more information.

Exit the Artists area by clicking the Close button in the lower left-hand corner of the screen, or by pressing the ESC key on your keyboard (located at the top left of your keyboard).

Chapter

5

Chapter 5 Composers and Repertoire

Overview

The Composer and Repertoire areas provide a comprehensive and invaluable repository for compositions of all kinds. Works that your orchestra has performed, works that it has not performed, chamber and solo works, publisher data, score availability, permanent holdings and more can all be stored, referenced, searched, filtered and reported upon.

Composer and Repertoire information in OPAS is divided into six distinct program areas.

The **Composers** area stores biographical information on composers in the database.

The **Works** area displays the details of all musical compositions in the database.

The **Publications** area assigns Publishers in the database to Works in the database. (see Chapter 6)

The **Perusals** area tracks the whereabouts of borrowed or lent scores. (see Chapter 6)

The **Rentals** area tracks the whereabouts and costs of rented scores. (see Chapter 6)

The **Library** area stores all the pertinent information regarding scores and materials in your orchestra's permanent holdings (see Chapter 6)

Composers Program Area

Overview

This area of the software contains all the basic information on Composers. Once a composer has been created in the OPAS database, that composer can be assigned to compositions in the database (see the next section of this manual).

To open the Composers area of OPAS, click the icon shown, or choose the Main Data | Composer menu item



The Composers area is divided into three sections or screens:

- **List** - shows a grid or List of all composers that meet the criteria you choose
- **Main** - displays basic logistical information about the composer
- **Documents** - links to external digital files related to this composer

The Composers area opens in the “Basic Search” or “Green Screen” search mode. To learn more about this search mode, see Chapter 21. If the demonstration database is being used, simply press the F9 key or click the icon shown to reveal all composers in this area.



List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area’s contents. In the Composer area it displays the Composer’s Name, Birth and Death Dates, and Abbreviation or Code.

These columns can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)

- re-sorted (click on a column heading to sort the list by the contents of that column). By default, this List screen sorts alphabetically by Last Name.

See Chapter 20 for more information on working with grids such as those on the List screen.

The List screen is used extensively to execute Searches and Filters. See Chapter 20 for more information on searches and filters.

To see the details of any composer, click the mouse once anywhere in the desired row, then click the Main Tab at the top of the window. Or simply double-click the mouse anywhere in the row.

Main screen

This screen contains all the basic information regarding a Composer.

The top portion of the screen indicates the Composer's **First** and **Last Name**, an abbreviation, initials or Code for the Composer, and the composers **Gender**.

The **Name 2** field can be used to store a translation of the Composer's name, or the name as it should appear on printed reports and documents.

The middle portion of the Screen contains two grids that indicate the **Nationality** and any **Residences** of the Composer. Click the green "+" key to add a country of Nationality or Residence, and the red "x" icon to remove the selected country of Nationality or Residence.

Countries can be created in the Background Data 1 | Countries program area of OPAS.

The bottom portion of the screen records the **Birth** and/or **Death** information for the Composer.



If further information on living composers - address, publisher, manager, publicist etc. - is to be stored in OPAS, make a separate of that Composer in the Artist area, in addition to the record in the Composer area. This is necessary for two reasons: (a) the information kept for Composers is distinct from that information kept for other entities, and (b) Works in the database look to the Composer area for an author, not the Artist area. See Chapter 4 for more information on the Artist program area.

Creating a new Composer

To create a new composer in the database, click the New icon in the lower right-hand corner of the screen, or press the CTRL+N keys on your keyboard. This will cause the Main screen to become blank (white fields). New composers are created on the Main screen.



The New + Copy icon creates a composer record based upon the one that is currently active (or showing on the screen).



The Save icon (or CTRL+S) saves changes. OPAS will display a prompt if you attempt to leave any screen without saving changes



The Delete icon (or CTRL+D) deletes the entire composer record.

The Undo/Restore icon (or CTRL+R) reverses the most recent change to the screen. This action must be implemented before the Save button is clicked



Documents screen

The Documents screen is used to link external digital files - word processing files, digital photos, sound clips, etc. - to a particular composer in the OPAS database. See chapter 19 for more information.

Exit the Composers area by clicking the Close button in the lower left-hand corner of the screen, or by pressing the ESC key on your keyboard (located at the top left of your keyboard).

Works Program Area

Overview

The Works area contains all musical compositions in the OPAS database.

All orchestral works in the database are created with:

- a unique Composer
- unique Movement Markings and Timings
- unique Instrumentation

Once a work is created, it can then:

- Have one or more Publishers
- Become part of your Orchestra's Library or permanent holdings
- Have Rental score information assigned to it
- Have Perusal score information assigned to it

- Be assigned to Activities

Once a work is assigned to an activity, the Instrumentation, Movement Markings, Secondary Titles and Timings can be altered only as they pertain to that performance. (See Chapter 7 for more information)

To open the Works area of OPAS, click the icon shown, or choose the Main Data | Works menu item



The Works area is divided into seven sections or screens:

- **List** - shows a grid or List of all Works that meet the criteria you choose
- **Main** - displays basic information about the composition
- **Instrumentation** - displays the instrumentation assigned to the composition
- **Additional Data** - stores text, performance rights, and premiere information
- **Publications / Library** - displays an overview of the basic publisher and library information for the work
- **Dates** - displays a performance history for the composition
- **To-Do List** - stores a task list or checklist that can pertain to commissions, score acquisition, dedications, etc.
- **Documents** - links to external digital files related to this composer



The Works area opens in the “Basic Search” or “Green Screen” search mode. To learn more about this search mode, see Chapter 21. If you are using the demonstration database, simply press the F9 key or click the icon shown to reveal all the composers in this area.

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area’s contents. In the Works area it displays the Composer, Main Tile, Key, Genre, Style,

Duration, Date, and Code for each Composition in the OPAS database.

These columns can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column). By default, this List screen sorts alphabetically by the Composer's last name

See Chapter 20 for more information on working with grids such as the list tab. The List screen is used extensively to execute Searches and Filters. See Chapter 20 for more information on searches and filters.

To see the details of any composition, click the mouse once anywhere in the desired row, then click the Main tab at the top of the screen. Or simply double-click the mouse anywhere in the row.

Main screen

This screen contains all the basic data for each Work or Composition in the OPAS database:

The screenshot shows the 'Main' tab of the OPAS database interface for the work 'SYMPHONY NO. 13, OP.113 (BABI YAR)' by Shostakovich, Dmitri. The interface includes several input fields and a table of movements.

Fields shown:

- Composer: Shostakovich Dmitri
- Title: SYMPHONY NO. 13, OP.113 (BABI YAR)
- Title 2: Symphony No. 13 in B-flat minor, Opus 113, "Babi Yar"
- Genre: Symphony
- Style: Russian
- Key: B-FLAT MINOR
- Catalogue: OP. 113
- Composed from: 1962
- Duration: 01:00:30

Movements table:

Order	Tempo	Duration
1	I. Babi Yar	00:16:20
2	II. Humor	00:08:20
3	III. In the Store	00:11:20

Composer - The Composer for this Work. Names in this drop-down list are read from the names in the Composers area in OPAS. (see the previous section, Composers, for more information). This field is highlighted in yellow, indicating that it cannot be edited once assigned to a composition.

Title - The main Title of the composition. This is the title by which you will perform the majority of your Searches and Filters in OPAS, so it is strongly recommended that you employ strict consistency in recording the title of works. It is an OLIS convention that this title be recorded in capital letters in order to avoid ambiguity with title aliases or diacritical marks. The demonstration database that comes with OPAS exhibits many of the other conventions used for the Titles of works. See page 459 for more information regarding work titles.

Title 2 - This is the title of the work as it should appear on printed programs and reports. It is an OLIS convention that any portion of the title that is to appear italicized is enclosed in carats. For example: <Academic Festival Overture> for *Academic Festival Overture*. It is not necessary to make a distinction between Title and Title 2 - for many works they may be the same.

Title 3 - this is provided primarily for foreign language translations of the work title or alternate titles

Code - An internal abbreviation or shorthand for this Work. For conversions of an existing OLIS database or another database of compositions, the work's database index number is stored here for reference. The code field is optional, and can contain up to 10 alphanumeric characters.

Arrangement - the name of the Work's Arranger or name of the Arrangement.

Genre - commonly used to record the musical forces or the composition's genre (an OLIS convention)

Style - the nationalistic style of the Work (an OLIS convention)

Catalog - the Work's catalog number - opus number, BWV number, K. number, etc.

Composed From / To - these three fields store: (a) a composition date indicator such as "c.", "?", etc. (b) the beginning year of composition (if the work was composed over a span of more than one year), and (c) the final year of composition (if the work was composed over a span of more than one year).

Key - the Key of the Work

Notes - An open field for any additional information

Mark - Used to temporarily mark a Work for use during Searches, Filters and/or data exports.

Duration field and Movements grid

The Movement grid contains the Tempo or Name of each Movement, its Duration, and the Order in which it is performed. The Tempo or Name of the Movement should be typed as it should appear on a printed program or report. This is why the number of the movement is often incorporated into its name ("III. Lento"). The Duration of each movement in the grid is stored in an hour:minute:second format.

As many movements as are required can be recorded. Add movements by clicking the New icon at the top right of the grid, and remove movements by clicking the red "x".

The Duration field at the top of the Movement Grid automatically sums the duration of each movement within the work. A duration can also be typed directly for works that have no movements, or to round up or round down the total duration. For example, if the sum of all movements in a work is 27:58, 28:00 can be typed instead.

Creating a new Work

To create a new composition in the database, click the New icon in



the lower right-hand corner of the screen: screen shot, or press the CTRL+N keys on your keyboard. This will cause the Main screen to become blank (white fields).

New works are created on the Main screen. Each work requires a Composer and a Title 1.

The New + Copy icon creates a new work based upon the one that is currently active.



The Save icon (or CTRL+S) saves changes. OPAS will display a prompt if you attempt to leave any screen without saving changes

The Delete icon (or CTRL+D) deletes the entire composition record.



The Undo/Restore icon (or CTRL+R) reverses the most recent change to the screen. This action must be implemented before the Save button is clicked.

Instrumentation screen

This screen displays the instrumentation assigned to a Work.

	Fl	Ob	Cl	Bn	Hn	Tp	Tb	Tu	Timp	Pro	Harp	Kbd	Ext	M1	M2	Va	Cl	Bas	NonStr.	Strings	Total
	3	3	3	3	4	3	3	1	1	4	2	1	0	14	12	10	8	6	31	50	81

Instrument	Count	Code
Flute	3	1, 2, P
Oboe	3	1, 2, 3/EH
Clarinet	3	1, 2, 3/BC/EC
Bassoon	3	1, 2, 3/CB
Horn	4	1, 2, 3, 4
Trumpet	3	1, 2, 3
Trombone	3	1, 2, 3
Tuba	1	1
Timpani	1	1
Percussion	4	
Harp	2	1, 2
Keyboard	1	
Extra	0	
Strings	50	14 12 10 8 6

Number	Instrument	Code
1	Bass Drum	BD
1	Castanets	cs
1	Chimes	c4
1	Cymbals (Pair)	CY

Number	Instrument	Code
1	Celeste	CE
1	Piano	Pf

Number	Instrument	Code
1	Bass	v7
1	Mens Chorus	3h

Instrumentation / Load from Instruments - the Instrumentation drop-down field allows a pre-defined list of Instrumentation configurations to be chosen. These Instrumentation configurations can be genre or period specific ("Woodwind Pairs", "Classical", "Baroque", "Pops") or can be specific to your own orchestra. See page 439 for more information.

Individual Instruments - The left field for any single instrument indicates the total required for the work. The right field indicates the breakdown or configuration of that instrument.

Strings - as with the Instrumentation drop-down list at the top of the screen, pre-defined list of String Complements can be created, and assigned to works using the drop-down arrow. As with Instrumentation, these string complements can be either genre-specific, or specific to your orchestra. See page 456 for more information.

Percussion / Keyboard / Extra / Solo Instruments grids - These four grids store the information indicated by their titles. With each, click the green "+" key to add an instrument, and the red "x" to remove one. With each entry in the grid, indicate the Number required for the work - the default number is "1".

Notes - The large field beneath the Extra and Solo Instruments grid can be used to store further information regarding the Work's instrumentation (indicate the location of offstage instruments, description of unusual instruments, optional doublings, score errata, etc.)


Additional Data screen

This screen stores other (optional) information regarding the Work.

Commission - the entity (or entities) that commissioned this work. This field can also be used to store dedication information

Sourcetext - the source of the Work's text or lyric

Intermission - a check in this box indicates that this work is

 **Intermission**

considered an intermission. This distinction is used almost exclusively in the printing of reports and the export of data. Many "compositions" in the database - such as "Intermission 2", "Short Pause", "Stage Change", etc. can be so designated as an Intermission.

Regular Work - similar to the "Intermission" flag, a check in this box indicates the composition is "regular." Un-checking this field provides the ability to further segregate works and refine searches and filters.

Themes - further indications or distinctions of a Work's genre or type. For example, a Work might be of the Genre "Narrator and Orchestra" and of the Style "American." You may want to further indicate that the work is a "Children's" work. Click the green "+" and choose from the available list to add Themes to this work.

Languages - To indicate the language of sung or spoken text in a work, click the green "+" to choose from the list of available Languages

Perf. Rights - To indicate any ASCAP, SESAC, BMI or other performance rights that are associated with the performance of this work, click the green "+" to choose from the list of available Performance Rights Associations.

Premieres - This grid records the various premieres of a given work. Indicate the type of premiere (World, U.S., North American, etc), the orchestra that gave the premiere (your orchestra or any other), and the conductor / city / venue and date. See chapter 7 for instructions on copying performance data from OPAS into the premieres grid.

Publication / Library screen

This screen provides a summary of the publisher and library information for the active work record. The detailed information regarding Publishers and Library Holdings for each work is covered in their respective areas of this document.

The top, **Publications**, grid indicates each Publisher for the work, reprint scores, and availability for published scores of this Work.

The bottom, **Library**, grid indicates the library catalog number, edition and publisher if the work is contained in your permanent holdings.

Dates screen

Each time a work is assigned to an orchestral activity, that activity is automatically cross-referenced on this Dates screen, giving a comprehensive history of each work's performance by your orchestra.

The basic performance information (Conductor, Date, Venue, etc.) is stored in each column. As with the List screen, these columns can be resized, re-ordered and re-sorted.

The Dates screen is by default sorted in reverse-chronological order (most recent performances at the top). To see the details of any given performance, right-click that activity in the grid, and choose "Dates" from the resulting pop-up menu.

The "Performance" check box, in conjunction with an F7 filter (see Chapter 20) or a Basic Search (see Chapter 21) can be used to limit the display of the grid to only performances.

To-Do List screen

OPAS provides the ability to create "To-Do" lists or task lists for any composition in the Works program area. As the name implies, the To-Do list organizes the details required for score commissions or dedications, score acquisitions, and other related activities.

Once checklists have been created for works, they can be organized and searched by a variety of criteria such as the task itself, the person responsible, tasks that are not completed, etc.

Creating, editing and configuring OPAS to-do lists is covered in Chapter 9.

Documents screen

The Documents screen is used to link external digital files - word processing files, digital photos, sound clips, etc. - to a particular composition in the OPAS database. See chapter 19 for more information.

To exit the Works area, click the Close button in the lower left-hand corner of the screen, or press the ESC key on your keyboard (located at the top left of your keyboard)

Chapter

6

Chapter 6 Score Management and Library Holdings

Overview

OPAS includes several distinct program areas to aid in the administration and organization of musical scores: assigning publishers and publishing agents to scores, borrowing, lending and renting scores from publishers or other orchestras, and managing the scores owned by your orchestra.

Each of these tasks is covered in its own section of this chapter, corresponding to the related program area of OPAS.

Publications Program Area

Overview

The Publications area of OPAS assigns music Publishers in the database to Works in the database, indicates score availability, and provides contact information and other data about the score publication.

To open the Publications area, click the Main Data | Library | Publications menu item.

The Publications area is divided into two sections or screens:

- **List** - shows a grid or List of all score publication records that meet the criteria you choose
- **Main** - displays basic logistical information about the publication



As with other areas of OPAS, the Publication area opens in the "Basic Search" or "Green Screen" search mode. To learn more about this search mode, see Chapter 21. If the

demonstration database is used, simply press the F9 key and click Yes at the prompt to reveal all the publication records in this area.

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area's contents. In the Publications area it displays the composer's name, title of the work, publisher and score availability.

These columns can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- e-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column). By default, this List screen sorts alphabetically by the composer's last name

See Chapter 20 for more information on working with grids such as those on the List screen. The List screen is used extensively to execute Searches and Filters. See Chapter 20 for more information on searches and filters.

To see the details of any publication, click the mouse once anywhere in the desired row, and then click the Main Tab at the top of the window. Or simply double-click the mouse anywhere in the row.

Main screen

This screen stores data for each Publication Record (that is, each distinct Publication of a single work). Any composition in the OPAS database can have as many different publication records as required.

Music publishing companies and publishing agents are created in the Address Book area of OPAS. The address/phone/contact information for that company is stored there. See Chapter 8 for more information on the Address Book.

Work	Beethoven Ludwig Van	CONCERTO, PIANO, NO. 4, G MAJOR, OP. 58						
Publisher	Breitkopf & Härtel (Leipzig)	Availability Sale						
<input type="checkbox"/> Rehearsal Letters <input type="checkbox"/> Measure Numbers <input type="checkbox"/> Critical Edition								
Edition	Printing							
Editor Name								
Notes								
Reprints [3] <table border="1"> <thead> <tr> <th>Publisher</th> <th>City</th> </tr> </thead> <tbody> <tr> <td>Broude Brothers, Ltd</td> <td>New York</td> </tr> <tr> <td>Edwin F. Kalms & Company, Inc</td> <td>Opa Locka</td> </tr> </tbody> </table>			Publisher	City	Broude Brothers, Ltd	New York	Edwin F. Kalms & Company, Inc	Opa Locka
Publisher	City							
Broude Brothers, Ltd	New York							
Edwin F. Kalms & Company, Inc	Opa Locka							
PV Scores [0] <table border="1"> <thead> <tr> <th>Publisher</th> <th>City</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> </tr> </tbody> </table>			Publisher	City				
Publisher	City							
Conductor Scores [1] <table border="1"> <thead> <tr> <th>Publisher</th> <th>City</th> </tr> </thead> <tbody> <tr> <td>Breitkopf & Härtel (Leipzig)</td> <td>Leipzig</td> </tr> </tbody> </table>			Publisher	City	Breitkopf & Härtel (Leipzig)	Leipzig		
Publisher	City							
Breitkopf & Härtel (Leipzig)	Leipzig							

The top row of the Publications screen indicates the score covered by this publication record. The remaining fields provide the details about the publication itself.

Work - The Composer and Title of the Work. Note that this field is highlighted in yellow, indicating that it cannot be edited once a publication record has been created.

Publisher - The Publisher of the work. Each publishing company is its own entity, created in the Address Book area of OPAS.

Availability - Indicates if the score is available for Sale, Rental, Not Available, Out of Print etc. This list can be customized and edited. Choose the Background Data 1 | Availabilities menu item, and click the New icon to create a new type of score availability.

Rehearsal Letters / Measure Numbers / Critical Edition - Check each box to indicate its relevance to this Publication

Edition / Printing - These two fields are alphanumeric fields, and indicate the Number of this Publication's Edition and/or Printing.

Editor Name - The name of the editor, if known

Notes - Any description or further information regarding this Publication.

Reprints Grid - This grid lists the different Reprint Scores associated with this Publication record - each entry in this grid will be a publishing company from the Address Book. Click the green "+" to add a new reprint score publication. To remove a record, select the desired line in the grid, and then click the red "x" button.

P/V Scores grid - This grid lists Piano/Vocal scores associated with this Publication record - each entry in this grid will be a publishing company from the Address Book. For each piano/vocal the Language can be indicated from the drop-down list in that column. Click the green "+" to add a new line to this grid. To remove a record, select the desired line in the grid, and then click the red "x" button.

Conductor Scores grid - This grid lists the different Conductor Scores associated with this Publication record - each entry in this grid will be a publishing company from the Address Book. Click the green "+" to add a new Publisher of a conductor score. Select a line in the grid, then click the red "x" button to remove a record.



Key information on this screen is also reflected in the main record for this Work. The publisher name (and city), critical edition flag, availability and availability options are reflected on the Publications/Library screen for the composition. See Chapter 5 for more information regarding the Works program area.

Creating a Score Publication

To indicate a new publication record for a musical score in the OPAS database, click the New icon in the lower right-hand corner of the screen: screen shot, or press the CTRL+N keys on your keyboard. This will cause the Main screen to become blank (white fields). New publications are created on the Main screen. Each publication record requires at least a musical work and publisher name to be chosen.



The New + Copy icon creates a new publication record based upon the one that is currently active.



The Save icon (or CTRL+S) saves your changes. OPAS will always prompt you if you attempt to leave any screen without saving your changes

The Delete icon (or CTRL+D) deletes the entire publication record.



The Undo/Restore icon (or CTRL+R) reverses the most recent change to the screen. This action must be implemented before the Save button is clicked.

To exit the Publications area, click the Close button in the lower left-hand corner of the screen, or press the ESC key on your keyboard (located at the top left of your keyboard)

Perusals Program Area

Overview

The Perusals area of OPAS stores information regarding those scores that are borrowed from an outside source or lent to an outside source. This is most often a Publisher, but it can also be another orchestra, library, university, etc.

To open the Perusals area, click the Main Data | Library | Perusals menu item.

The Perusals area is divided into three sections or screens:

- List - shows a grid or List of all score publication records that meet the criteria you choose
- Main - displays information about the score's whereabouts
- Documents - links to external digital files related to this composer

The Perusals area will open in the "Basic Search" or "Green Screen" search mode if there are more than 1,000 score perusal records in

the database (see Chapter 21), or open to the List screen if there are fewer than 1,000 score perusal records.

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area's contents. In the Perusals area it displays the Project for which the score was borrowed, the composer's name and title of the work, and other critical data such as who ordered the score and when.

These columns can be:

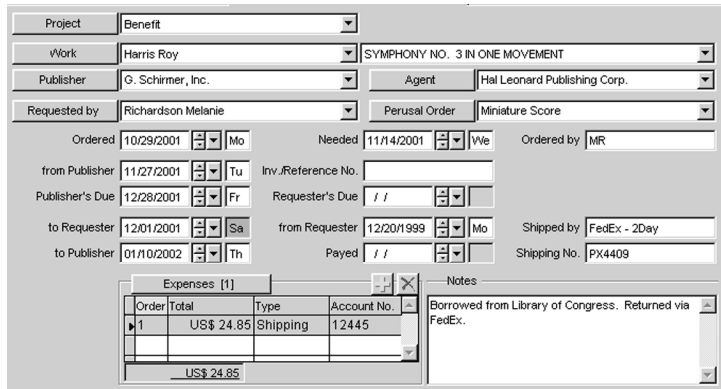
- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column). By default, this List screen sorts alphabetically by the composer's last name

See Chapter 20 for more information on working with grids such as this List screen. The List screen is used extensively to execute Searches and Filters. See Chapter 20 for more information on searches and filters.

To see the details of any perusal order, click the mouse once anywhere in the desired row, and then click the Main tab at the top of the window. Or simply double-click the mouse anywhere in the row.

Main screen

This screen keeps all the basic information surrounding the order of a Perusal score:



Project	Benefit		
Work	Harris Roy	SYMPHONY NO. 3 IN ONE MOVEMENT	
Publisher	G. Schirmer, Inc.	Agent	Hal Leonard Publishing Corp.
Requested by	Richardson Melanie	Perusal Order	Miniature Score
Ordered	10/29/2001 Mo	Needed	11/14/2001 We
Ordered by	MR		
from Publisher	11/27/2001 Tu	Inv. Reference No.	
Publisher's Due	12/28/2001 Fr	Requester's Due	/ /
to Requester	12/01/2001 Sa	from Requester	12/20/1999 Mo
to Publisher	01/10/2002 Th	Shipped by	FedEx - 2Day
	Payed	/ /	Shipping No. PX4409
Expenses [1]		Notes	
Order Total	Type	Account No.	Borrowed from Library of Congress. Returned via FedEx.
1 US\$ 24.85	Shipping	12445	
US\$ 24.85			

Project - The project for which this score is ordered; if the score is required for general use and not for a specific performance, use the Project "General" or "Administrative" (see page 445 for more information regarding Projects) .

Work - The composition or work itself. When entering a work, first select the Composer (by last name) on the left side of the split window. Once the Composer is chosen, the list of works in the OPAS database by that composer will appear on the right side of the split window.

Publisher - The publisher(s) of this work. Only Publishers that have been previously assigned to this work will appear in the drop-down list. See the Address Book, Chapter 8, for more information about creating Publishers, and the first section of this chapter regarding the creation of Publication records.

Agent - Any Agent(s) assigned to the Publication of this work

Requested by - The individual in your organization who requested the score. An entity must belong to the Address Group "Requester" to appear in this drop-down list (although that same entity may also

belong to other groups). See page 425 for more information regarding Address Groups.

Perusal Order - The specific items or scores ordered for perusal. New items can be added to the drop-down list by choosing the Background Data 2 | Perusal Orders menu item, or by clicking the field label "Perusal Order". In either case, click the New button to create a new item.

Date fields - Pertinent dates regarding the receipt, distribution and return of the score

Expenses grid - This grid records all the expenses associated with the receipt, use and return of this item. Click the green "+" button to add an expense via the Expenses window. See Chapter 11 for more information regarding Expenses

Creating a Score Perusal record

To create and track the borrowing of a perusal score in the OPAS database, click the New icon in the lower right-hand corner of the screen: screen shot, or press the CTRL+N keys on your keyboard.

This will cause the Main screen to become blank (white fields). New perusal records are created on the Main screen. Each perusal record requires at least a musical work and project name to be chosen.



The New + Copy icon: creates a new perusal record based upon the one that is currently active.



The Save icon (or CTRL+S) saves changes. OPAS will always prompt you if you attempt to leave any screen without saving your changes

The Delete icon (or CTRL+D) deletes the entire perusal record.



The Undo/Restore icon (or CTRL+R) reverses the most recent change to the screen. This action must be implemented before the Save button is clicked.

Documents screen

The Documents screen is used to link external digital files - word processing files, digital images, digital sound files, etc. - to a particular score perusal record. See Chapter 19 for more information.

To exit the Perusals area, click the Close button in the lower left-hand corner of the screen, or press the ESC key on your keyboard (located at the top left of your keyboard)

Rental Contracts Program Area

Overview

The Rental Contracts area of OPAS stores information for those scores that are rented from a Publisher for a defined set of performances.

To open the Rental Contracts area, click the Main Data | Library | Rental Contracts menu item.

The Rental Contracts area is divided into three sections or screens:

- **List** - shows a grid or List of all Rental Contracts that meet the criteria you choose
- **Main** - displays basic logistical information about any single Rental Contract
- **Documents** - links to external digital files related to this Rental Contract

The Rental Contracts area will open in the "Basic Search" or "Green Screen" search mode if there are more than 1,000 score rental records in the database (see Chapter 21), or open to the List screen if there are fewer than 1,000 score rental records.

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area's contents. In the Rental Contracts area it displays the Project and Season for which the

score was rented, the composer's name and title of the work, the Publisher and Publishing agent and the date the score was ordered.

These columns can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column). By default, this List screen sorts alphabetically by the composer's last name

See Chapter 20 for more information on working with grids such as this List screen. The List screen is used extensively to execute Searches and Filters. See Chapter 20 for more information on searches and filters.

To see the details of any rental contract, click the mouse once anywhere in the desired row, and then click the Main tab at the top of the window. Or simply double-click the mouse anywhere in the row.

Main screen

List		Main		Documents		
Project	Subscription Week 3	Season	01-02			
Work	Brahms Johannes	SYMPHONY NO. 4 IN E MINOR, OP.98				
Publisher	Breitkopf & Härtel (Leipzig)	Agent	Breitkopf & Härtel (Leipzig)			
Dates [2]						
Date	Time	End	Project	Activity	Conductor	City
12/08/2001	08:00 PM	10:00 PM	Subscription Week 3	Concert	Seaman, Christopher	Arlir
12/09/2001	03:00 PM	05:00 PM	Subscription Week 3	Concert	Seaman, Christopher	Arlir
Quoted	09/15/2001	Sa	Contr. Returned	///	Receipt	///
Ordered	10/01/2001	Mo	Purch. Order No.	AS-005	Returned	12/15/2001 Sa
Due	12/20/2001	Th	Invoice No.		Chk. Requested	///
Expenses [2]						
Order Total	Type	Account No.				
US\$ 650.00	Music Rental					
US\$ 64.58	Shipping					
US\$ 714.58						
Notes						

This screen keeps all the basic information regarding the Rental Contract for a musical score

Project - The Project for which this score is rented. Strictly speaking, a rental contract does not need to be associated with a single Project, but this association is strongly recommended for better organization of related expenses and printing of rental contracts.

Season - The Season for which this score is rented. Strictly speaking, a rental contract does not need to be associated with a single Project, but this association is strongly recommended for better organization of related expenses and printing of rental contracts.

Work - The composition or work itself. To select the work, first select the Composer (by last name) on the left side of the split window. Once the Composer is chosen, the list of works in the OPAS database by that composer will appear on the right side of the split window.

Publisher - The publisher(s) of this work. Only Publishers that have been previously assigned to this work will appear in the drop-down list. (See the Publications area for more information)

Agent - any Agent(s) assigned to the Publisher

Dates grid - the Date Grid stores all the Activities within the Project and Season for which this score is rented (typically, performances only). To select a date or dates, click the green "+" at the top of the grid. OPAS will display a list of all dates (a) that are part of the project/season combination currently active, (b) that have this work assigned and (c) for which a rental contract has not yet been assigned.

Date fields -The pertinent dates regarding the receipt, distribution and return of the score, the receipt and return of the rental contract, and the date a check is requested for payment.

Expenses grid - This grid records all the expenses associated with the rental of this score. Click the green "+" button to add an expense via the Expenses window. See Chapter 11 for more information regarding Expenses

Creating a Rental Contract

To create and track the rental of a musical score in the OPAS database, click the New icon in the lower right-hand corner of the screen: screen shot, or press the CTRL+N keys on your keyboard. This will cause the Main screen to become blank (white fields). New



rental contracts are created on the Main screen. Each rental contract record requires at least a musical work and Project to be chosen.

The New + Copy icon creates a new rental contract based upon the one that is currently active.



The Save icon (or CTRL+S) saves changes. OPAS will always prompt you if you attempt to leave any screen without saving your changes

The Delete icon (or CTRL+D) deletes the entire rental contract record.



The Undo/Restore icon (or CTRL+R) reverses the most recent change to the screen. This action must be implemented before the Save button is clicked.

Documents screen

The Documents screen is used to link external digital files - word processing files, digital images, digital sound files, etc. - to a rental contract. See Chapter 19 for more information.

To exit the Rental Contracts area, click the Close button in the lower left-hand corner of the screen, or press the ESC key on your keyboard (located at the top left of your keyboard)

Library Program Area

Overview

The Library area of OPAS organizes all Works in the database owned by your orchestra, or that are part of your Orchestra's permanent collection. As in the Publications area, any single Work in the database can appear many times in the Library. You may own multiple copies of a Work, or own different editions or publications of a Work.

To open the Library area, click the Main Data | Library | Library item, or click this icon screen shot

The Library area is divided into four sections or screens:

- **List** - shows a grid or List of all items in the Library that meet selected criteria
- **Main** - displays detailed information about any single Library item
- **To-Do List** - stores a customized list of tasks for any single Library item
- **Documents** - links to external digital files related to this Library item

The Library area will open in the "Basic Search" or "Green Screen" search mode. To learn more about this Filter mode, see Chapter 21. If you are using the demonstration database, simply press the F9 key to reveal all Library records.

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area's contents. In the Library area it displays the composer's name and title of the work, the publisher, internal catalog number and a check box that indicates the parts for the score are also in the Library.

These columns can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column). By default, this List screen sorts alphabetically by the composer's last name

See Chapter 20 for more information on working with grids such as this List screen. The List screen is used extensively to execute Searches and Filters. See Chapter 20 for more information on searches and filters.

To see the details of any item in the Library, click the mouse once anywhere in the desired row, then click the Main tab at the top of the window. Or simply double-click the mouse anywhere in the row.

Main screen

This screen keeps all the basic information regarding a score in your orchestra's Library:

vWork	Mozart Wolfgang Amadeus	SYMPHONY NO. 40 IN G MINOR, K. 550 [REVISED]									
Publication	Breitkopf & Härtel (Leipzig)	Publisher Broude Brothers, Ltd.									
Strings	7-7-6-6-5	<input checked="" type="checkbox"/> Parts in Library <input type="checkbox"/> vWV Doubling									
Instrumentation		Scores [2]									
Catalogue	#343-RV	<table border="1"> <thead> <tr> <th>Number</th> <th>Publisher</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Broude Brothers, Ltd.</td> <td>Full</td> </tr> <tr> <td>1</td> <td>Luck's Music Library</td> <td>Miniature</td> </tr> </tbody> </table>	Number	Publisher	Type	1	Broude Brothers, Ltd.	Full	1	Luck's Music Library	Miniature
Number	Publisher	Type									
1	Broude Brothers, Ltd.	Full									
1	Luck's Music Library	Miniature									
Purchase Date	06/06/1996 Th	Bowed by [0]									
Purchase Cost	327.00	<table border="1"> <thead> <tr> <th>Text</th> <th>Date</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> </tr> </tbody> </table>	Text	Date							
Text	Date										
Delivery Date	06/21/1996 Fr	Marking [0]									
Supplier		<table border="1"> <thead> <tr> <th>Artist</th> <th>Date</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> </tr> </tbody> </table>	Artist	Date							
Artist	Date										
Order No.											
Material											
Notes	Extra string parts										
Owner	Northern Virginia Symphony										

Work - The Composer (left-hand field) and Title (right-hand field) of the Work. Note that the Composer and Work fields are shaded in yellow, indicating that they cannot be edited.

Publication / Publisher - the Publication Record associated with this Work and the Publishers associated with this work. See earlier in this Chapter for more information on Publications

Strings - the number of string parts associated with this score, or any additional notes regarding the string complement

Instrumentation - any notes or explanation regarding the instrumentation for the score

Parts / WW Doubling - indicates if the Parts are in the Library and Woodwind doublings

“Unmarked” - this field is used to store the Library ID or index number if your data is converted from OLIS or another data source

Catalog - the internal shelf or catalog number for this score

Purchase Date / Cost / Delivery - optional fields regarding the purchase of the score

Supplier - the supplier of the score; publishers or businesses in the drop-down list will be from the OPAS Address Book. See Chapter 8 for more information regarding the Address Book

Order Number - invoice or order number from the Supplier

Material - the actual materials in the Library

Owner - the owner of this work/score set

Scores grid - Stores the number, type and Publisher of the physical scores on your library's shelf. Click the green “+” key to add a new score. Indicate the number you own, the Type of score (Full, Piano/

Vocal, Miniature, etc) and the Publisher.

Bowed grid - indicate the name or initials of the person who marked the bowings and the date. Add new entries by clicking the New icon at the top right of the grid. Remove entries by selecting them in the grid and clicking the red "x".

Marked By Grid - Indicates the Artist(s) or Conductor(s) who marked the scores. Add new entries by clicking the "+" icon at the top right of the grid. OPAS will display a sub-window of all artists in the database (see Chapter 4). Remove entries by selecting them in the grid and clicking the red "x".

Creating a new item in the Library

To create a new item in the OPAS Library, click the New icon in the lower right-hand corner of the screen, or press the CTRL+N keys on your keyboard. This will cause the Main screen to become blank

(white fields). New Library records are created on the



Main screen. Each item in the Library record requires at least a musical work (composer and composition) to be chosen.

The New + Copy icon creates a new Library item based upon the one that is currently active.



The Save icon (or CTRL+S) saves changes.

OPAS will always prompt you if you attempt to leave any screen without saving your changes



The Delete icon (or CTRL+D) deletes the entire Library record.



The Undo/Restore (or CTRL+R) icon reverses the most recent change to the screen. This action must be implemented before the Save button is clicked.

To-Do List screen

To-Do lists or task lists for items in the Library can be created and tracked. As the name implies, the To-Do list organizes the myriad details required for maintaining the Library, and the status of each individual item. For more information, and examples of To-Do Lists, see Chapter 9.

Documents screen

The Documents screen is used to link external digital files - word processing files, digital images, digital sound files, etc. - to a rental contract. See Chapter 19 for more information.

To exit the Library area, click the Close button in the lower left-hand corner of the screen, or press the ESC key on your keyboard (located at the top left of your keyboard)

Chapter

7

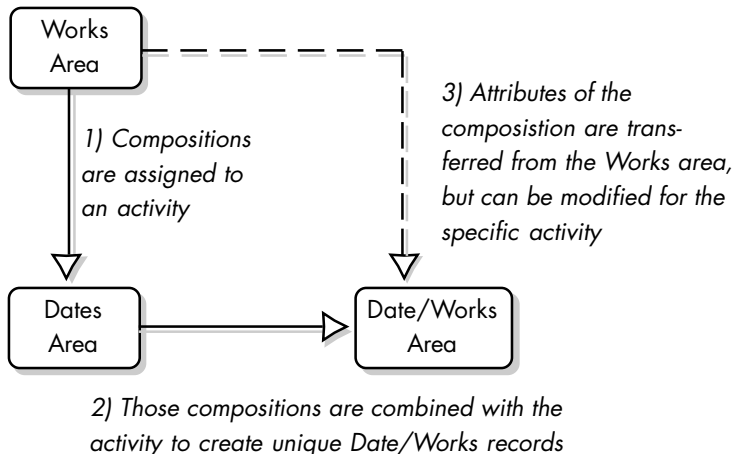
Chapter 7 Date-Works or Work Performances

Overview

Whenever a musical work is assigned to an activity - be it a rehearsal or performance - OPAS makes a separate record of that association. This association allows for changes to many attributes of the composition, including the Title, Movement(s), Instrumentation, Arrangement, and/or Timing, *only as the Work pertains to that activity*.

Therefore, if a guest conductor takes a different timing for a particular work, that timing change can be recorded only for the guest conductor's performance(s). Similarly, performances of single movements, excerpts of works, and reduced instrumentations can be recorded and kept, but do not affect the "master" record of the Work in the Works program area (see Chapter 5).

Because this area of OAPS deals specifically with the performance of a composition, it is given the name Dates/Works (in some areas it is also referred to as "Dates/Program")



There are two ways to open the Dates/Works area of OPAS:

1. From the main screen, choose *Main Data | Dates | Dates Works*. This method is used primarily to initiate searches of particular performances. For example, to find performances of a given composition that meet certain criteria. See Chapter 21 for more information regarding searches.
2. To see the compositions that are assigned to a specific activity, click the *Program* button at the top of the *Program Grid* in the *Dates* section:

Composer	Title
Rossini, Gioachino	BARBER OF SEVILLE: OVERTURE
Bruch, Max	CONCERTO, VIOLIN, NO. 1 IN G MINOR, OP.
Intermission,	INTERMISSION
Brahms, Johannes	SYMPHONY NO. 4 IN E MINOR, OP.98

The examples following here use the second method.

The Date Works (or Dates/Program) area is divided into three sections or screens:

- **List** - shows a grid or list of all compositions programmed on the activity
- **Main** - displays basic information about the composition and its specific characteristics for the performance
- **Instrumentation** - displays any changes of instrumentation for the activity

When opened using the method shown here, the Dates Works

section will load all the Works (including Intermission(s)) assigned to the activity.

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area's contents. In the Date Works section it displays basic information about the activity (date, time, project) and basic information about the work (composer, title, order, key, etc. - not all attributes of the work are shown in the illustration above)

Dates/Program [Sa, December 8, 2001, 08:00 PM : Rossini Gioachino, BARBER OF SEVILLE: OVERTURE]						
List			Main		Instrumentation	
Order	Date	Time	End	Project	Composer	Title
1	12/08/2001	08:00 PM	10:00 PM	Subscription Week 3	Rossini, Gioachino	BARBER OF SEVILLE: OVERTURE
2	12/08/2001	08:00 PM	10:00 PM	Subscription Week 3	Bruch, Max	CONCERTO, VIOLIN, NO. 1 IN G MAJ
3	12/08/2001	08:00 PM	10:00 PM	Subscription Week 3	Intermission,	INTERMISSION
4	12/08/2001	08:00 PM	10:00 PM	Subscription Week 3	Brahms, Johannes	SYMPHONY NO. 4 IN E MINOR

The columns on the List screen can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column. This List screen sorts by Date as a default.)

See Chapter 20 for more information on working with grids such as those on the List screen. The List screen is used extensively to execute Searches and Filters. See Chapter 20 for more information on searches and filters.

To see the details of any one composition, click the mouse once anywhere in that row, then click the Main tab at the top of the window. Or simply double-click the mouse anywhere in the row.

Main screen

This screen shows the pertinent information for the single Performance of this Work on the Date indicated in the Title Bar.

This screen is very similar to the Main Tab of the Works area (see Chapter 5). However, many of the fields are highlighted in yellow - indicating they cannot be changed. All fields in white can be changed or edited to better specify the performance of this work on this date.

Fields that can be changed or indicated:

Title 2 - The Title it should appear on printed program and reports (used particularly if the performance is an excerpt of the full work)

Arrangement - The Arranger or particular Arrangement of the work

Duration - The duration of the work for this performance. As in the Works section, the duration of the composition is automatically calculated as the sum of the individual movements. However simply typing a new value can change the work duration. This enables you to keep track of different conductor's timings of works, or to indicate changes in timings when repeats are (or are not) taken.

Premiere - Choose the premiere type from the drop-down list to indicate the premiere of a composition.

Genre	Overture/Prelude/Introduc	Catalogue	
Style	Italian	Composed from	1815
Premiere	North American	Key	E MA.
Library	Canadian		C
	North American		NA
Rental Contract	South African		SA
	U.S.		US
	World		W

The list of premiere types can be edited or augmented by choosing the Background Data 1 | Premiere Types menu item, or

by clicking the Premiere field label on the Date/Works screen. In either case, click the New icon to create a new premiere type.

To copy this premiere performance to the permanent record of this composition in the OPAS database, click the Function icon



at the top of the screen. Chose the "Copy Premieres to Works" function and click the Start Function button.

The premiere indicated for the performance of the work will be transferred to the Premieres grid in the Works program area of OPAS. The conductor and city will likewise be recorded. See Chapter 5 for more information regarding the Works program area and premieres grid.

Library - If this work is part of the orchestra's permanent holdings, indicate the Publication (edition) used for this performance. The drop-down list will display each occurrence of the score in the Library. A blank list indicates there are no scores for this work in the orchestra's Library. See Chapter 6 for more information on the Library program area.

Movements - Add, remove, edit, re-order, or in any other way change the movements of a Work as they pertain to this Performance

Encore - Indicates the specific performance of the work was an Encore

Rental Contract / Agent - If a score Rental Contract was created, and that contract included this performance, the name of the Publisher and Publisher Agent will appear in these fields. See Chapter 6 for more information on Rental Contracts. (These fields reflect data in the Rental Contracts program area and cannot be edited)

Notes - any performance-specific text or notes.

Load from Works - this button (in the upper right-hand corner of the window) will load all pertinent title and movement information from the entry of this composition as it appears in the Works program area of OPAS. This, in effect, restores the work's "default" values.

Instrumentation screen

This screen shows the pertinent Instrumentation information for the single performance of this Work on the Date indicated in the Title Bar.

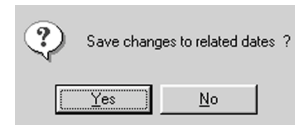
This screen is very similar to the Instrumentation Tab in the Works area (see Chapter 5).

All fields on the screen appear in white, indicating they can be edited, added to, or in any other way changed.

Load from Works - this button will load all instrumentation information from the entry of this composition as it appears in the Works program area of OPAS. This, in effect, restores the work's "default" values.

Notes and Uses for the Date/Works area

Since, by definition, any change made in the Date Works area affects the Date itself, OPAS will prompt you to save your changes to the other activities in the project. See Chapter 3 for more information regarding this feature.



Only works assigned to Dates of Level 1 are viewed in the Date/Works area of OPAS. See Chapter 3 for more information regarding Date Levels.

Information stored or changed in the Date Works area of OPAS is critical to the operation of these other program areas:

Service attendance and payroll - Chapters 15 and 16.

When assigning orchestra personnel and/or substitutes to an activity, OPAS calculates the musicians required for the service from the Instrumentation numbers in the Dates Works section. So if, for example, a selection is omitted from a dance suite, and that omission reduces the number of clarinets required from two to one, and that clarinet reduction is noted in the Date Work

section, then OPAS will display and calculate the number of required clarinets as one in all payroll and attendance functions.

All printed **reports** and documents (Chapter 22) utilize movement titles, duration values and instrumentation figures do so from the Date Works section.

Chapter

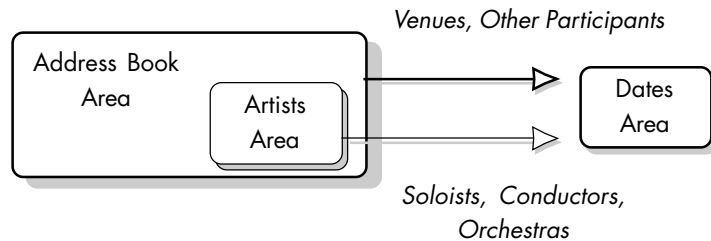
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Chapter 8 Address Book

Overview

In addition to Soloists, Conductors and Choirs/Orchestras (covered in Chapter 4) other people and businesses such as venues, publishers, vendors, board members, and artist managers can be stored in OPAS. These entities are created and managed in the Address Book area of the software. Much of the data kept in the Address Book area is identical to that in the Artists area, the key difference being that performance information is not relevant to businesses and people in the Address Book area.

Because the Address Book functions as a general contact information area of the software, Artist records can also be viewed in the Address Book area. Another way to think of this is that "Artists" are a special sub-set of Address Book entities that also have their own, specialized area of OPAS.



The Artists program area of OPAS is a subset of the Address Book program area - Artists can be thought of as Address Book entities that have special properties in the function of the Software.

Individuals and Ensembles in the Artists area can be seen in the Address Book, but people and companies in the Address Book cannot be seen in the Artists area (unless, of course, they are also Artists).

To open the Address Book area of OPAS click the icon shown, or choose the Main Data | Address Book menu item.



The Address Book area is divided into seven sections or screens:

- **List** - shows a grid or list of all entities that meet the criteria you choose
- **Main** - displays the main contact information about the entity (the person or company)
- **Contacts / Agents** - displays alternate contact information and lists the people who work at a company
- **Additional Data** - a customizable screen that displays selected data that you define and choose
- **Personal Data** - displays information specific to members of your orchestra
- **Documents** - links to external digital files related to this activity

As with other areas of OPAS, the Address Book opens in the “Basic Search” or “Green Screen” search mode. To learn more about this search mode, see Chapter 21. If the demonstration database is used, click the icon shown or press the F9 key to reveal all the Address Book records



List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area’s contents. In the Address Book area it displays the Name, Address components and Address Group for all performers, orchestras, companies, publishers, and people in the OPAS database. Remember that this List screen will also display individuals and ensembles from the Artists program area.

The columns on the List screen can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column. This List screen sorts by the Company or Last Name as a default)

See Chapter 20 for more information on working with grids such as those on the List screen. The List screen is used extensively to execute Searches and Filters. See Chapter 20 for more information on searches and filters.

To see the details of any one entity in the database, click the mouse once anywhere in that row, then click the Main tab at the top of the window. Or simply double-click the mouse anywhere in the row.

Main screen

This screen contains all the basic information about the person or company. Store as much or as little information about each entity as is required or known.

The screenshot shows a detailed view of an entity in the address book. The main form contains the following information:

- Co. /Last Name:** Fine Arts Management
- First Name, Code:** [Empty] FAM
- Name 3, Name 4:** [Empty]
- Address 1:** 75 Lafayette Avenue
- Address 2:** [Empty]
- City:** Brooklyn
- State, Zip:** NY 11217
- Country:** United States of America
- Title:** [Empty]
- Salutation:** [Empty]
- Notes:** [Empty text area]
- Order:** [Empty] **Mark:** [Empty]

On the right side, there are three sub-sections:

- Groups [2]:** A table with columns Group and Code.

Group	Code
Artist Manager	Mgr
Vendor	VEND
- Contact Numbers [3]:** A table with columns Order, Number, Type, and Text.

Order	Number	Type	Text
1	(718) 852-3558	Phone	Main
2	(718) 852-3572	Fax	
3	www.fineartsmanageme		
- Functions [0]:** A table with columns Name and Code.

Name	Code

Co. / Last Name - the Last Name or Company Name

First Name / Code - if the entity is a person, that person's First Name and Code or Abbreviation

Name 3 - An additional or alternate name (if the entity is a person, this could be a maiden name or alias)

Name 4 - An additional or alternate name, if required

Address 1 / Address 2 / City / State / Zip / Country - The business or personal address in standard U.S. format

Title - Formal Title or prefix (Dr., Ms., Maestro, etc)

Salutation - If you will run Mail Merges or create personalized letters from OPAS, create a list of Salutations that can be used.

Notes - is an open field for any additional information

Order - As mentioned above, Artists can be viewed in the Address Book area as well as the Artists area. The two order fields are used only for Orchestra Members or Substitutes to indicate the chair/stand seating order

Mark - Used to temporarily mark a field for use during Searches and Filters, or to separate certain records

Groups grid

This grid indicates the Address Group(s) to which the entity belongs. Any entity can belong to more than one group - add and remove groups with the green "+" and red "x" buttons. If there is more than one Group listed, the group highlighted in yellow is considered the entity's Main Group. Any group can be the main one by selecting it in the grid, and clicking the Set to Main button. The Address Group to which an entity belongs can affect the way the entity functions in OPAS. See page 425 for more information regarding Address Groups.

Contact Numbers grid

This grid contains the phone, fax, email and web site contact numbers for the person or company. Each number consists of:

- Order - the order in which the number appears in the grid. To change the order of numbers, simply highlight a number and type the new desired value. OPAS will then automatically re-sort the grid around that typed number.
- Number - the phone number, email address or web site address itself
- Type - "Phone", "Fax", "Email", or "Web Site"
- Text - any (optional) short, descriptive text for the number ("Home", "Pager", "Studio", "Office", etc.)

To add a contact number, click New icon at the top right of the grid and enter the desired elements of the number. When in the Numbers grid (that is, actively entering or editing a phone number), a new number can be added by holding down the CTL key and pressing the down arrow on the keyboard.

Sending an email from OPAS

If the contact number in question is an email address, OPAS can launch your default email program and insert that email address into the "To:" field. Simply click on the email address in the Contact Numbers grid, and the "Send Email" button will become active.

Click that "Send Email" button and your default email program will be started.



Order	Number	Type	Text
1	(718) 852-3558	Phone	Main

Launching web sites from OPAS

If the contact number in question is a web site, OPAS can launch your default web browser and go to that web site. Click on the internet address in the Contact Numbers grid, and the "Open URL" button will become active. Click that "Open URL" button and your default web browser will be launched and be directed to the site.

Functions grid

Contact Numbers [3]			
Order	Number	Type	Text
1	(718) 857-3558	Phone	Main

This Grid is used for orchestra personnel entities, and is primarily used in European orchestra systems. It indicates the class, level or professional category of the musician. This professional category can be used to influence payroll calculations and/or service counts.

Creating an Address Book record

To create a new entity in the Address Book, click the New icon in the lower right-hand corner of the screen: screen shot, or press the CTRL+N keys on your keyboard. This will cause the Main screen to become blank (white fields). New people and companies are created on the Main screen. Each Address Book entity record requires at least a Last or Company name and an Address Group be chosen.



The New + Copy icon creates a new Address Book record based upon the one that is currently active.



The Save icon (or CTRL+S) saves changes. OPAS will always prompt you if you attempt to leave any screen without saving your changes

The Delete icon (or CTRL+D) deletes the entire Address Book record.



The Undo/Restore icon (or CTRL+R) reverses the most recent change to the screen. This action must be implemented before the Save button is clicked.

Contacts/Agents screen

The Contacts/Agents tab organizes a variety of information for each entity. Because the Address Book stores many different kinds of entities representing a variety of Address Groups, this screen is used in different ways. The grids on this screen will also reflect any data entered in the Artists area of OPAS (see Chapter 4)

Contacts grid

This grid stores any series of contacts you may have had with the entity. It can track discussions, confirmations, document exchanges, etc.

For each item in the grid, indicate its Date, Type ("P" for "Phone" or any code), and a Text description or note.

Orchestra grid

If the person in question is an artist, this grid can indicate the Orchestras and/or Choruses to which he/she belongs.

Contact Persons grid

This grid is used if the Address Book entity is a company or business, and contains the Names and contact information for the individual people at that business. Note that this grid also contains a "Send Email" icon

To add a new contact person, click the green "+" icon to bring up this screen. The fields match those on the Address Book main tab. Note that individuals stored here are *not* separate Address Book entities, although much of the information stored is the same.

Residences

If the Address Book entity is a person, this grid can store any secondary or alternate addresses. For example, summer or vacation homes, alternate mailing addresses such as those at a University, etc.

Agents

This grid is utilized if the Address Book entity is an Artist or Pub-

lisher. It contains the Name, City and Capacity of the entity's Agent or representative. Click the green "+" icon to display a list of Agencies from which you can choose - note that these Agencies are individual Address Book entities themselves. In the Capacity field, type the relationship of the Agent to this entity. See Chapter 4 for more information and an example of the relationship between Artist and Agent.

Additional Data screen

OPAS provides the ability to create and store customized information for each of the different types of entities in the database. This Additional Data screen stores information not already stored elsewhere in the program area.

Each distinct Address Group - type of entity in the Address Book - can have its own set of Additional Data. The Additional Data used for a person or company in the Address Book will be that of the person or company's "Main" Address Group. To set the Additional Data for a specific activity type, choose the Background Data 1 | Address Groups menu item. Choose the appropriate artist type from among the Address Groups, and click the Add. Fields tab to set the contents of the Additional Data screen for that Address Group.

See page 422 for more information and examples of Additional Data screens.

Personal Data screen

This screen is used almost exclusively for Address Book entities that are orchestra members or substitutes. See Chapter 4 for more information on the Personal Data screen.

Documents screen

The Documents screen is used to link external digital files - word processing files, digital images, digital sound files, etc. - to a particular entity in the Address Book. See Chapter 19 for more information and for examples.

Chapter

9

Chapter 9 Checklists / To-Do Lists

Overview

OPAS contains Checklists or “To-Do” lists in many program areas. As the name suggests, these customizable lists track tasks and other time-sensitive “things to do”. In each program area, the structure of the checklist is the same, and checklists can be tracked both within the program area in which they were created, and across all program areas of OPAS.

Following is a list of OPAS areas that contain dedicated To-Do Lists, and examples of the items that could appear on those lists. The examples given of to-do list tasks are by no means comprehensive nor exclusive.

Dates (see Chapter 3)

- Production Information such as Piano Tunings, Presentation Bouquets, Comp Ticket requests, etc.
- Music preparation details such as Conductor Cuts/Markings received, Scores distributed for bowings, Marked/Bowed scores distributed, folders loaded, etc.

Dates / Marketing (see Chapter 10)

- Information from the Dates area as well as marketing-specific data such as ticketing , marketing and advertising deadlines.

Works (see Chapter 4)

- Commission tasks
- Score acquisition items

Library (see Chapter 5)

- Score usage information such as marking and distribution dates
- Score lending or borrowing data, in conjunction with the Perusals section

Artist Contracts (see Chapter 14)

- Contract log, indicating contract generation, whereabouts, signing and execution dates, itinerary generations, etc.

Projects (see page 446)

- Project contract or venue document processing, etc.

Tours (see Chapter 18)

- Contract or document logs, travel or ticket distribution, hotel booking, itinerary distributions, etc.

Creating To-Do Lists

The To-Do List itself is quite flexible. In each OPAS program area, the process for setting up a To-Do List is:

- 1) Create the status levels that will be used for items on all To-Do Lists
- 2) Create the List itself and organize the List into a templates so all the items on that list can be registered at once
- 3) Load the Template(s) in the desired program area, thereby assigning the items on the To-Do List
- 4) Edit, Add or Remove the To-Do List items as needed

Step one: Creating To-Do List status levels

From the Main Screen, choose Background Data 2 | Todo-List Job Status. Click the Main tab or screen to create edit and remove To-Do List statuses.

This area of OPAS is used to create the various Status(es) that define and manage tasks.

Each Status on the list has its own code and color. Create statuses by clicking the New button in the lower right-hand corner (or by simultaneously pressing the CTRL and N keys on the keyboard).

Make sure each Status as the check mark in the To-Do List box so that it will appear on subsequent lists.

Step two: Creating items on To-Do List Templates

From the Main Screen, choose Background Data 2 | Todo-List Templates. Click the Main tab or screen to create, edit and remove To-Do List templates.

As checklists or To-Do Lists tend to repeat a set of tasks or items (for example, the same tasks are repeated for each concert by the orchestra), OPAS allows for the creation of To-Do List templates. A template is created, and then the items that make up the checklist itself are assigned to the template. Then when in the desired program area, the To-Do List template is chosen, thereby automatically assigning all the items on the template.

Individual items can be added or removed from the To-Do List, independent of the template.

The examples shown here are for a simplified list of concert production tasks. This template would be used in the Dates area of OPAS.

Order	Job	Person	Notes ...	Priority	Jling planned	Status
1	Piano Tuning	Rick Anderson	Pro Piano Tur	1	-14	Order
2	Soloist Comp Ticket	Jane Elgin		1	-14	Order
3	Maestro Comp Ticket	Jane Elgin		1	-21	Order
4	Presentation Bouqu	Artist Assistant		1	-14	Order

The top portion of the screen contains the Template information:

Name - The name of the To-Do List Template

Code - An abbreviation or short-hand code for the Template Name

Notes - Any text or description of the Template

The **grid** at the bottom of the screen contains the actual To-Do List items. Click the green "+" icon at the top of the grid to display the following window and create the actual tasks:

The screenshot shows a task creation window with the following fields and values:

- Job:** Maestro Comp Tickets
- Person:** Jane Elgin
- Priority:** 1
- Scheduling planned:** -21
- Notes:** (Empty text area)
- Status:** Ordered

Job - The task itself. Consistency is recommended for Job Names (for example, always use "Piano Tuning" and not sometimes "Piano Tuning" and sometimes "Tune Piano"). This makes the master list of To-Do items much easier to sort and examine)

Code - An abbreviation for the task.

Person - The staff member responsible for the execution of this task. As this field can be used as the basis of searches (to find all of an employee's tasks), consistency is recommended. For example, use either staff initials, or full names, but not both.

Priority - The default priority number assigned whenever the task itself is assigned. "1" is the default. Priority numbers are 0 through 9.

Scheduling Planned - In Dates Area checklists, the number in this field will indicate how many days before or after the activity date the task "Planned" date will be. If the planned or assigned date of a task should be three weeks before the concert to which the task is assigned, the value in this field will be -21.

Notes - Description or notes about the task

Status - The default status displayed when the task is first assigned to a To-Do List. The statuses in drop-down list are comprised of the items created in Step 1

Order - Re-order the tasks on this list by typing in a new number

Creating a New Task for To-Do Lists

To create a new item or task for the active To-Do List template, click the New icon in the lower right-hand corner of the screen or press the CTRL+N keys on your keyboard. This will cause the Main screen to become blank (white fields). New tasks are created on the Main screen.



The New + Copy icon creates a new task based upon the currently active record.



The Save icon (or CTRL+S) saves changes. OPAS will always prompt you if you attempt to leave any screen without saving your changes

The Delete icon (or CTRL+D) deletes the entire To-Do List task.



The Undo/Restore icon (or CTRL+R) reverses the most recent change to the screen. This action must be implemented before click the Save button is clicked.



Note: Clicking the Delete button on the "Todo-List Templates" screen will delete the entire Template and all the items on it. To remove a single item from the template, select the item in the grid, and click the red "x" at the top right-hand corner of the grid.

Step three: Assigning To-Do Templates in OPAS program areas

Note: as mentioned above, this manual uses the Dates area of OPAS as an example The To-Do List can be applied in many different program areas using the same process.

To assign a template and its corresponding list of items, click the To-Do List tab in the program area. Then click the down-arrow next to the Templates field to select any of the templates that have been created. Finally, click the Load from Template button, and the To-Do list will be filled in, using the order and defaults set up within that list (see the previous section of this document).

FILTER: Dates 1 [Su, December 9, 2001, 03:00 PM : Concert]

List	Main	Program	Additional Data	To-Do List	Docu				
Templates	Concert Preparation			Load from Template					
To-Do List [4]									
Order	planned	Job	Code	Time	Person	Priority	Status	done	Notes
1	11/25/2001	Piano Tuning	Tun	12:00 AM	Rick Anderson	1	Ordered	/ /	Pro P
2	11/25/2001	Soloist Comp	Tix	12:00 AM	Jane Elgin	1	Ordered	/ /	
3	11/18/2001	Maestro Comp	Tix	12:00 AM	Jane Elgin	1	Ordered	/ /	
4	11/25/2001	Presentation B	Flwr	12:00 AM	Artist Assistant	1	Ordered	/ /	

Each row in the grid represents an individual task, appearing in the order specified when the List was created. Tasks can be re-ordered simply by typing a new number in the green "Order" column. Columns in the To-Do List grid can be re-arranged by simply clicking on the column heading and dragging it into place.

To track or change the status of any item, simply double-click on it within the To-Do List Grid. This will open a window identical to that used to create the items on the List. From this screen, indicate the new status, change the priority, indicate the date finished, add notes, or change the staff assignment for the task.

When a task becomes assigned to a specific record in the OPAS database, it contains a new field: Address. This drop-down list is linked to all Address-Book entries in OPAS, and can indicate the business or entity tied to the task, or required for the task. This is an optional field. See Chapter 8 for more information regarding the OPAS Address Book.

Click the Save button at the bottom right of the screen to save the changes and return to the To-Do List screen.

Multiple To-Do List templates can be assigned on any To-Do List

screen (for example, a single concert may have both a music-distribution checklist and a production checklist). Click the down arrow as for the first Template, select the Template and click the Add from Template button. When multiple templates are assigned, they are combined into one master list.

Step four: Adding or removing individual tasks

Individual tasks that are not part of any template can be added directly on the To-Do List screen of the desired program area. Simply click the green "+" icon at the top right of the To-Do List grid. This will open the "To-Do List" window on which the details of the task or item can be filled out.

To remove an individual item or task from the To-Do List, select the item in the grid, and click the red "x" at the top right-hand corner of the grid.

Master List of all To-Do Items

Overview

As mentioned at the beginning of this Chapter, several different program areas in OPAS each contain a To-Do List or Checklist screen. However, you can also search, filter and view a master list of items across all program areas. This is especially helpful if a single staff member has tasks in more than one area, or if tasks in multiple areas all involve the same Address Book contact, or to view all tasks in all areas that are due on a certain date or related to the same Project.

To open this Master List area, choose the Main Data | "To Do List" menu item.

The To-Do List area is divided into two sections or screens:

List - shows a grid or List of all tasks that meet certain criteria

Main - displays information about the task itself

The To-Do List area opens in the "Basic Search" or "Green Screen" search mode. To learn more about this search mode, see Chapter



21. If the demonstration database is used, click the icon shown or press the F9 key to reveal all the To_Do List records in this area

Security in this master To-Do List area is based upon the User's rights in the program area from which the task or item originates. For example, if a To-Do List item is created in the Contracts area of OPAS, and a User does not have view rights in the Contracts area, then that same User will not be able to view any To-Do List tasks or items created in the Contracts area.

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area's contents. In the To-Do List area it displays all tasks created in all program areas of OPAS (see the previous paragraph for exceptions based upon User security settings)

The columns in the grid can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column). By default, this List screen sorts chronologically by the plan date of the task.

See Chapter 20 for more information on working with grids such as those on the List screen. The List screen is used extensively to execute Searches and Filters. See Chapter 20 for more information on searches and filters.

To see the details of any task, click the mouse once anywhere in the desired row and then click the Main tab at the top of the window. Or simply double-click the mouse anywhere in the row.

Main screen

This screen keeps all the information on a single To-Do List task or item. For more information on this screen, and creating new items for this master To-Do List section, see "Creating items on To-Do List Templates" earlier in this chapter.

Chapter

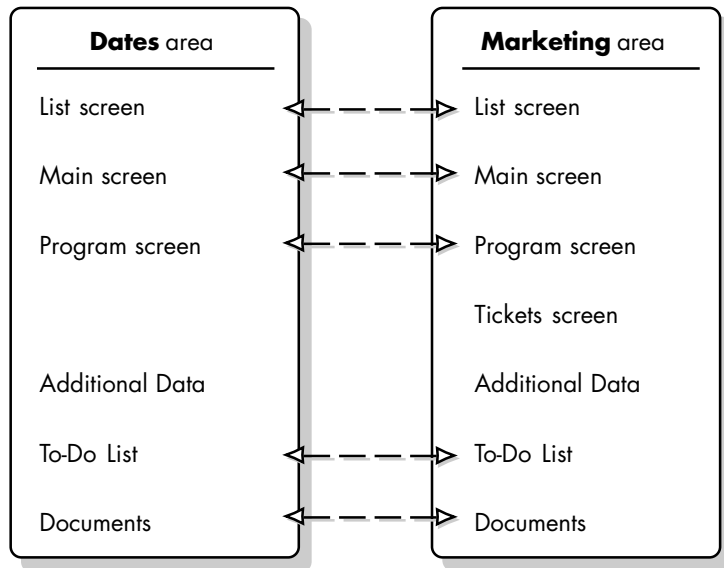
10

Chapter 10 Marketing

Overview

The Marketing area of OPAS provides the means to store ticket information - both numbers of tickets sold and ticket income - for activities in the Dates program area.

The Marketing area is identical to the Dates area except for two screens - the Tickets screen (which stores specific marketing data) and the Additional Data screen (which stores additional data specific to the marketing area). As the Marketing area reflects so much information from the Dates area, it is recommended that you have some familiarity with basic OPAS functions before using the Marketing area. See Chapter 3 for information regarding the Dates area.



The Marketing area replicates data in the Dates area with the exception of the Ticket screen (unique to the Marketing area) and the Additional Data screen (the Marketing area contains a different set of additional data from the Dates area)

It is not the intent of OPAS to replicate or replace a box office system. The level of detail stored for ticket categories is designed to provide either future income planning or historical sales data, not to print or sell tickets to the public.

The information stored in the Marketing area can be combined with expenses (see Chapter 11) to provide Income/Expense reports for specific Projects, Date Ranges or Seasons.

To open the Marketing area, choose the Main Data | Marketing menu item.

The Marketing area is divided into seven sections or screens:

- **List** - shows a grid or List of all orchestra Activities or Dates that meet specific criteria
- **Main** - displays basic logistical information for an activity
- **Program** - displays program and soloist information for an activity
- **Tickets** - displays ticket sale and income data for an activity
- **Additional Data** - a customizable screen that displays selected data that you define and choose
- **To-Do List** - a customizable production schedule or list of tasks for the activity in question
- **Documents** - links to external digital files related an activity

The Marketing area will open in the “Basic Search” or “Green Screen” search mode. To learn more about this search mode, see Chapter 21. If the demonstration database is being used, simply press the F9 key to reveal all the Dates records in this area.

The List, Main, Program, To-Do List and Documents screens are identical to their counterparts in the Dates area. See the respective section of Chapter 3 for more information on these screens.

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area's contents. In the Marketing area, it displays the same date/time/Project/Conductor information for all activities as is shown the Dates area.

The columns on the screen can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column. This List screen sorts by Date as a default.

See Chapter 20 for more information on working with grids such as those on the List screen. The List screen is extensively used with Searches and Filters. See Chapter 20 for more information on searches and filters.

To see the details of any one activity, click the mouse once anywhere in that row then click the Main tab at the top of the window. Or simply double-click the mouse anywhere in the row.

Main screen

The Main Tab contains the vital information for an activity such as the time, location, and conductor.

Program screen

The Program screen contains all the Repertoire and Soloist information for the activity.

Tickets screen

The Tickets screen stores the ticket sale and income information for the activity record.

Order	Category	Account No.	Number	Ticket Price	Total Amount	Occupancy %	Text
01	Subscription T		388	\$ 25.40	\$ 9,855.20	30	
02	Discounted Su		15	\$ 22.00	\$ 330.00	1	
06	Discounted Si		146	\$ 20.00	\$ 2,838.44	11	Includes block to local J
10	Single Tickets		451	\$ 25.00	\$ 11,047.00	35	
20	Complimenta		24	\$ 0.00	\$ 0.00	2	
			1024		\$ 23,870.64	80	

Seats: 1275
Notes:

The grid in the main body of the screen stores the individual price, number sold, occupancy and income amounts for each category or class of ticket offered:

Category - The class or category of ticket. Categories should be based upon economic division or class of tickets. See page 457 for information on creating Ticket Categories.

Account No. - The general ledger or account number (optional). See page 415 for more information regarding Account Numbers.

No. Sold - The Number of tickets sold (or projected to be sold) in this category.

Ticket Price - The price of the ticket in the category.

Total Income - The ticket income in the category (the number of tickets sold multiplied by the ticket price)

Occupancy % - The percentage of the venue sold by the tickets in this category.

Text - any optional text or notes

Below the grid are the total figures for the Number of tickets sold, the total ticket income, and the total venue capacity.

The **Seats** field at the bottom of the screen stores the number of seats in the venue. This number is divided by the number of tickets sold to arrive at the occupancy percentage for each ticket category. Seat numbers are not inherently tied to a single venue as seat configurations and stage extensions can modify the number of available seats in the same venue. The “Copy Seats” function (see below) can be used to assign the same seat number to any number of activities.

Assigning Marketing Data to Activities

To assign ticket sales data to an activity in the OPAS database, click the green “+” icon at the top right of the grid. This will open the “Add Marketing/Tickets” sub-window. Choose the Ticket Category to be assigned and click the large left-pointing arrow to assign it. The same ticket category can be assigned any number of times to the same activity.

On the main Tickets screen, edit any of the following fields or columns to better reflect the actual or projected ticket sales for the category:

- Account Number
- Number Sold
- Ticket Price
- Total Income
- Text

OPAS will automatically calculate both the Total Amount and the Occupancy percentage based upon the number of tickets sold and the ticket price.

The Total Amount figure can be over-written to store an income figure that is not a strict product of the tickets sold multiplied by the ticket price. For example, if there is a wide variety of discounts and specials available to the public, there may be a dozen or more different “Discounted Single Ticket” prices for a single concert. As it

is assumed that this level of detail is better suited to the orchestra's box office program, a simple average of these prices - or no price at all - may be stored in OPAS for the "Discounted Single Ticket" category. In this instance, the Total Amount figure will not be calculated accurately and can be over-written with the correct amount.

Additional Data screen

OPAS provides the ability to create and store customized marketing information for an Orchestra's different Activities; information that is not already contained on the Main or Program tabs. The information stored on the Marketing Additional Data screen is different from that in the Dates area, although the layout and purpose of the screen is the same.

Additional Data in the Marketing area of OPAS might concern the date tickets go (or went) on sale, any special block or group ticket information, ticket outlets, etc.

As with the Dates area, each different type of activity can have its own set of Additional Marketing Data.

See Page 422 for more information and examples of Additional Data screens.

To-Do List screen

OPAS provides the ability to create To-Do lists or task lists for any activity in the Dates Section. As the name implies, the To-Do list organizes the myriad production details required for concerts or rehearsals, and the status of each individual item.

The To-Do list in the Marketing area reflects items from the Dates area, but additional marketing-specific items can be created.

Documents screen

The Documents screen links external digital files to a particular activity in the OPAS database. See Chapter 19 for more information.

Notes on the Marketing area

Only Dates of Level 1 are visible in the Marketing area. See Chapter 3 for more information regarding Date levels.

Because the two program areas are intertwined, activities can be modified and created in the Marketing program area just as they are in the Dates area. Activities created in the Marketing area will say "Dates" in the source field and will be level 1 activities. See Chapter 3 for more information regarding the creation of orchestra activities.

All search options that are available in the Dates area are also available in the Marketing area. This makes it possible to conduct searches, filters and data analysis that weigh repertoire, venue and/or soloist data with ticket sales and income.

Keep in mind that the Marketing area of OPAS can be equally used for future activities to store ticket sales projections, and past activities to store historical ticket data.

It is possible to create import routines that read ticket sales data from Box Office programs or other digital files. Contact Fine Arts Management for more information.

Exit the Marketing area by clicking the Close button in the lower left-hand corner of the screen, or by pressing the ESC key on your keyboard (located at the top left of the keyboard).

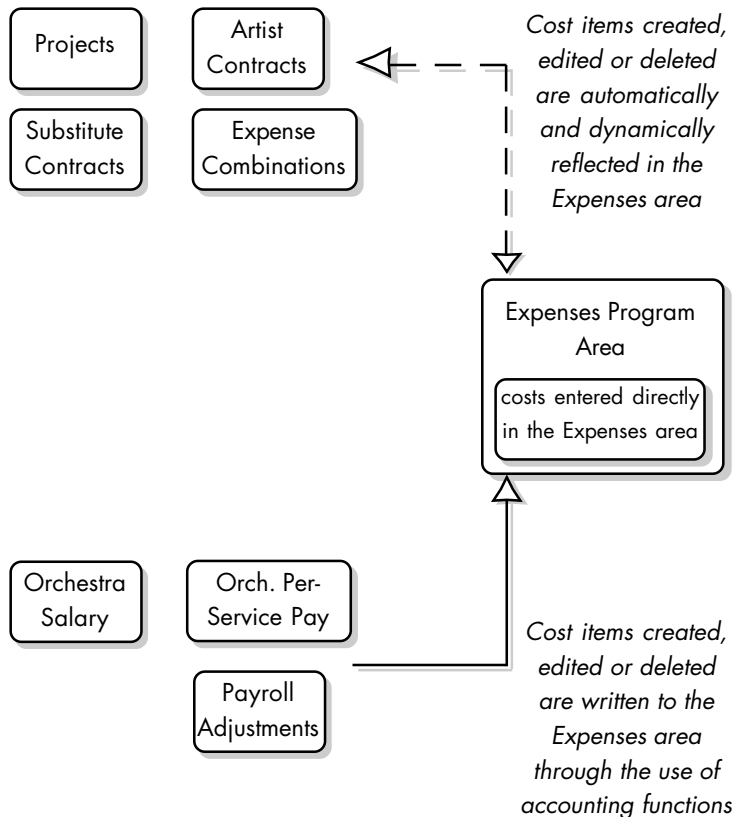
Chapter

11

Chapter 11 Expenses, Budgets and Finances

Overview

Expenses can be created in many different program areas of OPAS: Artist Contracts, Projects, and Music Rental Contracts to name but three. So that OPAS can provide a complete and comprehensive picture of an orchestra's finances, each program area feeds its data to the Expenses area of the program. The Expenses area consolidates all of these various items into the sum total of the orchestra's operating costs. These expenses can then be viewed and analyzed by a variety of criteria (per Project, per Season, per Payee, etc.).

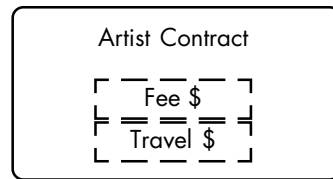




Security Note: User Permissions in the Expenses section are based upon the source of the Expense. If, for example, a User does not have permission to see the Artist Contract area of OPAS, then the User will also not be able to see any entry in the Expenses section that originated from the Artist Contract area.

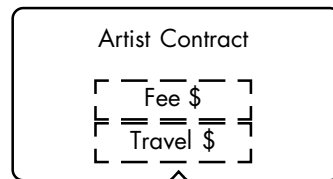
A specialized program area of OPAS that is used to create expense items is the Expense Combination area, discussed in this chapter on page 180.

Most areas of OPAS automatically copy financial information to the Expenses program area. For example, creating a soloist fee associated an artist contract will automatically write that same fee to Expenses. Similarly, deleting fees in the Artist Contract area will also delete them from Expenses, and deleting items from the Expenses program area will remove them from the program area in which they originated.

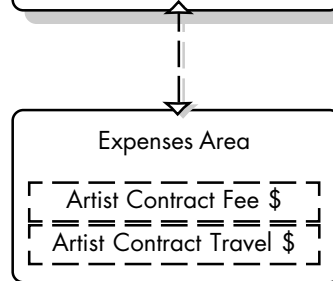


Example:

(1) When an Artist contract is created, one or more expenses may be assigned to the Contract



(2) When the contract is saved, those expense components become visible in the Expenses area where they can be managed, edited or deleted.



A dynamic link is established between the Contract and Expenses area so that changes to the individual expense items in one area are visible in the other.



The notable exception to this rule is any expense relating to orchestra payroll. This is for two reasons:

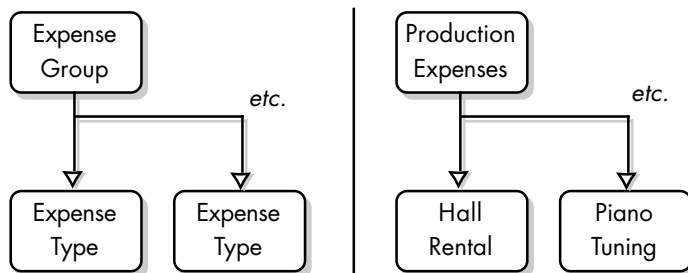
1. The complexity of payroll calculations (which may require figuring several different overages or percentages on a base cost) make a dynamic link between the Payroll sections and Expense sections impractical
2. The Payroll sections of OPAS are specifically designed to allow for “what-if” scenarios. Pay can be calculated, adjusted, and re-calculated. When the pay figures are complete and accurate, they can then be written to the Expenses section for permanent storage.

Payroll expenses are instead written to the Expenses section through the use of Functions (described in Chapter 16 and 17).

Expense Groups and Expense Types

Overview

OPAS groups cost items primarily by Group, and within each Group, by Type. There can be as many or as few Expense Groups and Types as required by your orchestra. The use of Expense Groups is not mandatory, but strongly recommended as it imposes a logical structure on the assignment of expenses or cost items, and allows for a greater degree and flexibility of cost analysis.



Expense Groups

To create or modify Expense Groups, choose the Background Data 2 | Expense Type Groups menu item from the OPAS main screen.

The Main screen in this program area is used to create and modify Expense Groups. These groups are at the top of the orchestra's financial hierarchy, and should reflect the most basic organization of cost items. It is likely that a half-dozen or fewer Expense Groups may be needed. For example:

- Administrative Expenses
- Operation Expenses
- Artistic Expenses
- Production Expenses
- Other Expenses

Each Expense Type Group has a name, code and a flag that indicates the expenses in this group will apply to per diem costs (this last feature is used only in specialized personnel functions and is rarely employed).

To create a new Expense Group, click the New icon in the lower right-hand corner of the screen or press the CTRL+N keys on your keyboard. This will cause the Main screen to become blank. Expense Groups are created on the Main screen.



The New + Copy icon creates a new group based upon the currently active record.

The Save icon (or CTRL+S) saves changes. OPAS will display a prompt if you attempt to leave any screen without saving changes.



The Delete icon (or CTRL+D) deletes the Expense Group.

The Undo/Restore (or CTRL+R) reverses the most recent change to the screen. This action must be implemented before the Save button is clicked.



Expense Types

Specific categories of expenses such as “Hall Rental”, “Radio Advertising”, “Soloist Fee”, and the like are Expense Types, and are assigned to (or belong to) Expense Groups. See the previous section of this manual for information on Expense Groups. To create or modify Expense Types, choose the Background Data 2 | Expense Types menu item from the OPAS main screen.

The Expense Types program area is divided into three screens:

- **List** - displays a list of all expense types that meet criteria you define
- **Main** - displays the attributes of a single expense or cost item
- **Budgets** - used to indicate the budget amounts for expense types within a Project and Season

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire program area’s contents. In Expense Types the List screen displays the Name, Code, Account Number, fixed amount and Group for each distinct expense category in the database.

The columns on the screen can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column.) By default, this List screen sorts by Expense Type name.

See Chapter 20 for more information on working with grids such as those on the List screen.

To see the details of any expense type, click the mouse once anywhere in the desired row, and then click the Main tab at the top of the window. Or simply double-click the mouse anywhere in the desired row.

Main screen

The Main screen is used to create new Expense Types, and modify existing Expense Types.

The screenshot shows a software window titled "Expensetypes 1 [Artist Fee: Conductor]". It has three tabs: "List", "Main" (which is active), and "Budgets". The "Main" tab contains the following fields:

- Name:** Artist Fee: Conductor
- Code:** COND
- Order:** (empty field)
- Account No.:** (empty field)
- Amount:** (dropdown menu)
- Group:** Artistic Expenses

Name - the name of the Expense Type as it should appear throughout the program and in printed reports (see below for hints on creating Expense Type names)

Code - a short-hand code or abbreviation

Order - the order field can be used to group like expenses, and will impose a sort order on expenses as they are created throughout the program. The main Expenses grid can be sorted by the contents of this field, as can printed reports. Use of the field is optional, and it does not imply any inherent hierarchy or importance of expenses. The Order field can hold up to 5 letters and numbers.

Account No. - the internal Account or General Ledger number associated with the expense type. See page 416 for more information on Account Numbers.

Amount - if this Expense Type has a fixed amount associated with

it, it can be assigned here. See the next section of this chapter for more information on fixed amounts.

Group - the Expense Group to which this Expense Type belongs. See the previous section of this chapter for more information regarding Expense Groups.

Creating a new Expense Type

Click the New icon in the lower right-hand corner of the screen or press the CTRL+N keys on your keyboard. This will cause the Main screen to become blank (white fields). Expense Types are created on the Main screen.



The New + Copy icon creates a new expense type based upon the currently active record.

The Save icon (or CTRL+S) saves changes. OPAS will display a prompt if you attempt to leave any screen without saving changes.



The Delete icon (or CTRL+D) deletes the entire Expense Type.

The Undo/Restore (or CTRL+R) reverses the most recent change to the screen. This action must be implemented before the Save button is clicked.



Exit the Expense Types area by clicking the Close button in the lower left-hand corner of the screen, or by pressing the ESC key on the keyboard.

Naming conventions for Expense Types

Expense types can be further categorized and organized in OPAS by adopting consistent naming conventions for the Expense Type name itself.

For example, the following different Expense Types may be part of the Expense Group "Artistic Expenses"

Expense Group: Artistic Expenses

Expense Types: Soloist Fee, Chorus Fee, Conductor Fee, Core Player Fee, Overtime

To better organize these various expense types both within the software itself (in drop-down lists and grids), and to provide for better expense analysis, the following syntax can be employed:

Expense Type: Sub-Type

This breaks the expense down into two separate components that can be extracted if need be. The list above could be reformatted as:

Expense Group: Artistic Expense

Expense Types:

Artist Fee: Soloist

Artist Fee: Conductor

Artist Fee: Chorus

Personnel: Core Player Fee

Personnel: Overtime

In this way, like cost items will appear together in drop-down lists and sub-grids, and analysis can be done on the Expense Group (Artistic Expenses), the Expense Type (Artist Fees), and/or specific elements of Expense Types (Soloist fees).

Accounting Items/Amounts

If an Expense Type always has the same dollar amount associated with it, then that dollar amount can be permanently linked to the Expense Type. Whenever the Expense Type is then assigned, so to is the amount. These amounts are referred to as "Accounting Items" or "Fixed Amounts"

This feature is used most with payroll functions. A pay rate ("Basic Scale" for example) is an Expense Type. However, a "Basic Scale"

may be the same fixed dollar amount each time it is used, an amount can be permanently associated with it. Other examples of Expense Types that might use these fixed or static amounts are venue rental or piano tuning.

Use of the Amounts feature is optional, and fixed amounts are always used in association with the Expense Type to which they belong.

To create fixed amounts, choose the Background Data 2 | Amounts menu item. See page 416 for more information on creating Fixed Amounts.

Budget screen

The Budget screen is used to indicate the budget amount for this expense type for individual Projects and Seasons. See page 188 of this chapter for more information.

Expenses Program Area

Overview

The Expenses program area is used both to create ad-hoc expenses (those that are not created as part of another program area) and to view/analyze expenses created in other areas of OPAS. The Expenses program area contains all cost items or expense line items in the database.

To open the Expenses area of OPAS, choose the Main Data | Expenses menu item.

The Expenses program area is divided into two sections or screens:

- **List** - displays a grid or list of all Expense items that meet specified criteria
- **Main** - contains the basic information about Expenses and can be used to create new expenses

The Expenses area opens in the “Basic Search” or “Green Screen” mode. To learn more about this search mode, see Chapter 21. If using the demonstration database, simply press the F9 key (then click Yes at the prompt) to reveal all the expenses items in this area

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire program area’s contents. In Expenses, the grid displays the type, source, amount, payee, season, project and other pertinent data regarding each single expense item. A running total of all expense items is displayed at the bottom of the List screen.

Order	Type	Source	Project	Address	Total	D:
	Advertising: Radio	Calculation	Subscription Week 4	WQZR, FM 90.1	US\$ 378.60	0:
	Advertising: Radio	Calculation	Subscription Week 4	WETA, 90.9 FM	US\$ 375.00	0:
05	Artist Amenities	none	Subscription Week 4	Catering by Carol,	US\$ 27.50	0:
A01	Artist Fee: Soloist	Soloist Contract	Subscription Week 4	Lifschitz, Konstantin	US\$ 3,750.00	0:
A02	Artist Fee: Soloist	Soloist Contract	Subscription Week 4	Lifschitz, Konstantin	US\$ 1,850.00	0:
A03	Transportation: Soloist	Soloist Contract	Subscription Week 4	Lifschitz, Konstantin	US\$ 750.00	0:
Total					US\$ 7,131.10	

Example of Expense List screen. The total of all expense items visible on the list screen will display at the bottom of the screen.

The columns on the screen can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)

- re-sorted (click on a column heading to sort the list by the contents of that column. This List screen sorts by Type as a default.)

See Chapter 20 for more information on working with grids such as those on the List screen. The List screen is used extensively to execute Filters. See Chapter 20 for more information on searches and filters.

To see the details of a single expense item, click the mouse once anywhere in that row then click the Main tab at the top of the window. Or simply double-click the mouse anywhere in the row.

Main screen

The Main screen in the Expenses area is used to store all the background descriptive data and the amount of a single expense or cost item. This same expense screen is used when creating a cost item in all OPAS program areas.

Number	Amount	Currency	Total	Rate	Total
1.00	1850.00	US\$	1,850.00 US\$	1.0000	1,850.00 US\$
Expense Type	Artist Fee: Soloist	Account No.	Date	Season	
Project	Subscription Week 4	SS-0098	03/02/2002	01-02	
Serie					
Address	Lifschitz Konstantin	Soloist Contract	Source		
Order	A02		Acc.Source		
Text	Run-Out in Charlottesville				Mark <input type="checkbox"/>
Notes					Budget Amt. <input type="checkbox"/>
					Fixed <input checked="" type="checkbox"/>
					cancelled <input type="checkbox"/>

The top row contains the financial data for the expense

Number - the quantity of the item or expense

Amount - the charge amount for each item

Currency - the currency for the charge (optional). See page 189 of

this chapter for more information regarding currencies. All new expense items will, by default, be created in the "own currency."

Total - the total of the Number field multiplied by the Amount field

Rate - the conversion rate for the currency, if it is not the default (home) currency

Total (right field) - the total of the amount in the default (home) currency

Expense - the Expense Type for this cost item. See above for more information regarding Expense Types

Account No. - the Account Number associated with the Expense Type (if there is one). The associated number is entered by default, but can be changed or removed. See page 416 for more information regarding Account numbers.

Date - the date the expense is applied or to be paid. (Any date in the past or future can be entered).

Season - the season to which the expense applies. The season will be automatically calculated based upon the Date entered. See page 453 for more information regarding Seasons.

Project / Account No. - The Project to which the expense applies (optional) and the account number for that Project. See page 446 for more information regarding Projects.

Series / Account No. - The Series to which the expense applies (optional) and the account number for that Series. See page 455 for more information regarding Series.

Address - The entity to which the cost or expense is paid. When the expense is created in another area of OPAS, this field will be automatically filled in. Entities in this drop-down list come from the OPAS Address Book. See Chapter 8 for more information regarding the Address Book.

Source / Acc. Source - The OPAS program area in which the expense was created. If the expense or cost item is created within Expenses area itself (that is, this screen) the Source will read "none"

Order - the order field can be used to group like expenses, and will impose a sort order on the List screen and in printed reports. Use of the field is optional, and it does not imply any inherent hierarchy or importance of expenses. The Order field can hold up to 5 letters and numbers. If an Expense Type has an Order associated with it, that Order is assigned by default.

Text / Notes - any descriptive text concerning this charge. If the expense originated in another OPAS program area, then the Text and Notes from that program area will be transferred over.

Mark - a temporary field used to delineate expenses for searching, exporting or printing

Budget - a check indicates that the specific expense or charge is an estimated, or unconfirmed, but budgeted amount. See page 187 of this chapter for more information about setting budgets in OPAS.

Fixed - a check in this box indicates the expense has been finalized and paid. OPAS accounting functions and reports do not re-calculate "Fixed" expenses (for example, OPAS will not recalculate a change in currency exchanges). While there is no inherent feature to prevent it, Users should not change "Fixed" expenses. All expenses in OPAS are "Fixed" by default.

Canceled - this expense indication is used primarily with Artist contracts and indicates the contract from which the expense originated has been canceled. "Cancelled" expenses do not appear on reports or calculation functions, but remain in the database for future reference.

Creating a new Expense item

Click the New icon in the lower right-hand corner of the screen or press the CTRL+N keys on your keyboard. This will cause the Main



screen to become blank (white fields). Expenses are created on the Main screen.

Fill in, if applicable, the number of the item(s) purchased and the cost per item (or enter the total cost and leave the Number field set to 1). Indicate the Expense Type, Date (the date the expense or cost item is to be paid), and (if known or applicable) the Address Book entity to whom the expense is paid. Account numbers, Series and other attributes of the Expense can also be filled in.



The Save icon (or CTRL+S) saves changes. OPAS will display a prompt if you attempt to leave any screen without saving changes.

The New + Copy icon creates a new expense or charge based upon the currently active record.



The Delete icon (or CTRL+D) deletes the entire Expense.

The Undo/Restore (or CTRL+R) reverses the most recent change to the screen. This action must be implemented before the Save button is clicked.



To exit the Expenses program area, click the Close button in the lower left corner of the screen, or press the Esc key at the top left of your keyboard

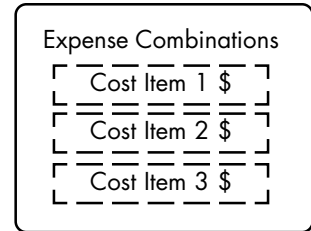
Expense Combinations Program Area

Overview

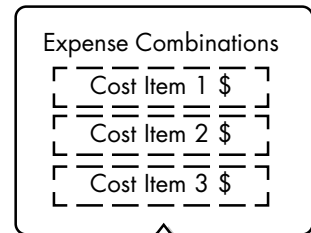
OPAS enables similar expenses to be combined for easier data entry, analysis of the cost category and editing of line items. Often the expenses are from the same administrative area (such as marketing or advertising), but a group or combination of expenses can span as many different expense types and program areas as required.

Individual costs or expenses are created in the Expense Combinations area, and when the combination or grouping is saved, the individual expense items are also written to the Expenses area of OPAS. The combination remains intact in the Expense Combinations area (as does the reference in the Expenses area) for future reference and editing.

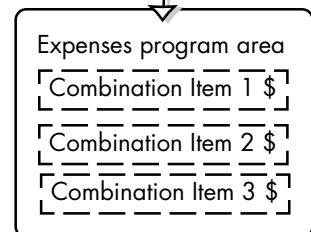
Individual but related cost items are created in the Expense Combinations area



*When the Expense Combination is **saved**, its components are written to the OPAS Expenses area with the Source field "Calculation".*



A dynamic link between the two is created so that changes or deletions in one area are visible in the other



To open the Expense Combinations area, choose the Main Data | Expense Combinations menu item

The Expense Combinations program area is divided into two screens:

- List - displays a list of all expense combinations or calculations that meet specified criteria
- Main - displays a single Expense Combination and the individual items that comprise it

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire program area's contents. In Expense Combinations, it displays the Project, Title, Code and Date of all Expense Combinations or Calculations

The columns on the screen can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column.)

See Chapter 20 for more information on working with grids such as those on the List screen.

To see the details of any one Expense Combination set, click the mouse once anywhere in that row then click the Main tab at the top of the window. Or simply double-click the mouse anywhere in the desired row.

Main screen

The Main screen is used to create and modify Expense Combinations. Each combination or calculation can be comprised of as many or as few expense items as are necessary.

Order	Total	Type	Account No.	Acc. No (Serie)	Acc. No (Project)
	\$378.60	Advertising: Radio			SS-0098
	\$375.00	Advertising: Radio			SS-0098
					\$753.60

Notes
Standard WQZR / WETA package

Project - The Project to which the charges pertain

Mark - A temporary field used to isolate expenses for searching, exporting or printing

Budget - A check indicates that the expense or charge is an estimated, or unconfirmed, but budgeted amount

Title - The name of this combination or set of expenses. It can refer to the program area or operational area to which the expenses apply

Code - A shorthand abbreviation or code for the grouping

Date - The date the Expense combination is created - dates for individual expenses are entered with the expense as noted below

Notes - Any descriptive text concerning this Calculation

Templates - the Expense Template provides a quick means of entering a fixed set of expense items and amounts. See page 188 below for more information regarding Combination Templates.

Expenses grid - the expenses grid contains the individual expenses or charges that comprise the Expense Combination. The total of each individual line item in the combination appears at the bottom of the grid.

Order	Total	Type	Account No.	Acc.No (Serie)	Acc.No (F
	\$378.80	Advertising: Radio			SS-009E
	\$375.00	Advertising: Radio			SS-009E

Each line item in the expenses grid is a distinct expense or cost item

Number	Amount	Currency	Total	Rate	Title
12.00	31.25	USD	318.80	1.0000	378.80

Expense Type	Advertising Radio	Account No.		Date	
Project	Subscription Week 4	SS-009E		0218/2002	01-02
Address	HQZR FM 90.1	Calculation		Source	
Order		Acc.Source			
Text	(1) 30-Second Spots				

To edit any individual expense item, double-click the line or click the Expenses button.

To create a new Expense, click the green “+” icon at the top right of the grid to display the standard OPAS expenses screen. See page 179 above for more information regarding the fields on this screen. Click OK or Save to save the individual cost or expense and to return to the Expense Combinations screen.

Creating a new Expense Combination

Click the New icon in the lower right-hand corner of the Expense



Combinations Main screen: screen shot, or press the CTRL+N keys on the keyboard. This will cause the Main screen to become blank (white fields).

Fill in, if applicable, the Project to which the combination belongs, a title for the combination, and the date the combination is created.

If there is an existing expense template that can be used to fill the expenses grid, select it from the drop-down field and click the “Load from Template” button. Otherwise click the green “+” icon at the top

right of the grid and add individual expense items as indicated on page 177. The Season and Date entered on the individual expense screen will be those that are written to the Expenses area of OPAS. When the individual expense items are entered, click the OK or Save and Close buttons to return to the Expense Combinations screen.

The Save icon (or CTRL+S) saves the Expense Combination and writes every line item in the Expenses Grid to the Expenses area of OPAS. OPAS will display a prompt if you attempt to leave any screen without saving changes.



The New + Copy icon creates a new expense combination based upon the currently active record.



The Delete icon (or CTRL+D) deletes the entire expense combination.

The Undo/Restore (or CTRL+R) reverses the most recent change to the screen. This action must be implemented before the Save button is clicked.



The Expense Combinations and Expenses area are dynamically linked. The individual line items that create the Expenses Grid of the Combinations program area become individual line items in the Expenses area itself. Each of these have the Source "Expense Combinations" assigned so it is clear where in OPAS they were created. Changes to the individual expense items in either program area will be reflected in both program areas.

Exit the Expense Combinations area by clicking the Close button in the lower left-hand corner of the screen, or by pressing the ESC key on your keyboard (located at the top left of your keyboard).

Expense Templates

Overview

Expense Templates are used to group individual expense items for quick entry in the Expense Combinations program area. An expense template will contain a set of fixed expense items or expense types - they are then all assigned to an Expense Combination at one time. After being added, individual amounts can be entered or modified. See the previous section for instructions on applying a completed Expense Template.

To open the Expense Templates program area, chose the Background Data 2 | Expense Templates menu item.

Expense Templates are created and edited on the Main screen of this program area.

The screenshot shows the 'Main' screen of the Expense Templates program. At the top, there are two tabs: 'List' and 'Main'. The 'Main' tab is active. Below the tabs, there are three input fields: 'Name' with the value 'Standard Concert Production', 'Code' with the value 'PRD', and 'Notes' with the text 'Standard fixed expenses for classical concerts. To be removed/edited as circumstances dictate'. Below the form is a table with the following data:

Order	Total	Type	Account Number
P01	\$75.00	Piano Tuning	
P02	\$28.50	Artist Amenities	
P03	\$265.50	Production: Security/Attendants	
P04	\$185.50	Production: Recording	
	\$554.50		

Name - the name of the Template as it will be used in the program

Code - an optional shorthand or abbreviation for the Template

Notes - an optional description or notes regarding the Template

List grid - the List grid contains the individual expense items that comprise the Template. To add expense items, click the green "+" icon at the top right of the grid to display the standard OPAS expenses screen. See page 177 above for more information regarding the fields on this screen. Click OK or Save to save the individual cost or expense and to return to the Expense Combinations screen.



Note: Individual expense items in a template do not necessarily need to have an amount associated with them - the amount can be entered (or edited) when the expense is assigned in the Expense Combinations program area.

Currency and Conversions

OPAS allows for any number of foreign currencies to be created and used in the various financial areas of the software. One currency is marked as your "own Currency" and conversion rates are made in relation to that. This document assumes the "own Currency" is the U.S. dollar.

To create or edit foreign currencies, chose the Background Data 1 | Currencies menu item. Currencies are edited and created on the main screen of this program area.

Code	€
Name	Euro
Rate	1.1487 \$ = 1 €
<input type="checkbox"/> own Currency	

Name / Code - the name and abbreviation of the currency

Rate - the rate of the currency as it relates to the U.S. Dollar. The number in this field indicates the number of dollars that equal

a single unit of the foreign currency.

Own currency - a check in this box indicates the currency that is created is the default currency in use by OPAS.

When an expense is entered in OPAS, and no currency is indicated, OPAS will assume the currency is that marked "own currency" - that is, the expense is in U.S. dollars.



If a foreign currency expense is marked "Fixed", and the exchange rate for that foreign currency is changed, OPAS will not recalculate the amount in U.S. dollars. This feature enables past expenses to be locked in at a fixed rate.

Budgeting Features

Overview

OPAS provides for budgetary figures to be assigned to a variety of financial aspects of the software. These budget amounts can then be compared to line items in the Expenses program area through the use of reports and functions.

Projects

Budget amounts can be assigned to a Project within a single Season. To assign budget amounts, open the Projects area (Main Data | Projects) and click the Budget tab.

Click the green "+" icon, and indicate the Season and the budget amount for that season. The budget amount is for the entire Project, and all activities that comprise it.

See page 446 for more information regarding Projects.

Activities

Budget amounts can be assigned to Activity Types within a single Season. To assign budget amounts, choose the Background Data 1 | Activities) menu item and click the Budget Tab.

Click the green "+" icon, and indicate the Season and the budget amount for that season. The budget amount applies to every Activity of that type within that season, regardless of the Project and/or Season to which the Activity is applied.

See page 419 for more information regarding Activities

Expense Types

Budget amounts can be assigned to Expense Types within a Project and Season combination. This method is the most consistent with standard U.S. orchestra budget structures. To assign budget amounts, choose the Background Data 2 | Expense Types menu item and click the Budget tab.

On the Budget screen, click the green "+" icon and indicate the Season and Project to which the current Expense Type budget should apply, and indicate the budget amount. If the Expense Type does not apply to a specific Project, then that field can be left blank. There can be different amounts for different Projects within the same season:

Applying and Analyzing Budget Amounts

OPAS does not automatically combine budget amounts entered in the three program areas indicated above. In this way, three distinct sets of budget figures can be maintained and independently analyzed.

Budget figures are not reflected in the Expenses area of OPAS; they remain in the program area(s) in which they were created.

Reports and functions are used to compare actual expenses (from the Expenses program area) with their respective budgetary figures. There are several such reports built in to OPAS, and more can be created and customized. Budgetary analysis reports are run from the Expenses program area.

Expense reports and analysis

As expense items are stored in the OPAS database like all other data, they can be searched and filtered like all other data. Expenses that pertain to a single category, Project, Season, vendor, date range, or any combination of these criteria, can be viewed.

Chapters 20 and 21 of this manual describe search and filtering techniques used in OPAS.

The screenshot shows a software window titled "BASIC SEARCH: Expenses 1". It has two tabs: "List" and "Main". The "List" tab is active. At the top, there are input fields for "Number", "Amount", "Currency", "Total", "Rate", and another "Total". Below these are several dropdown menus for "Expense Type", "Project", "Serie", and "Address". To the right, there are fields for "Account No.", "Date", and "Season". Further down, there are fields for "Order", "Text", and "Notes". On the right side, there are dropdowns for "Source" and "Acc.Source", and a "Mark" button. At the bottom right, there is a "Budget_Amt" label.

Any field or combination of fields on this screen can be the criteria for expense analysis

When a filter or search is run in the Expenses area, the matching expense items are displayed on the List screen. The sum total of the active expense items is dynamically calculated and displayed at the bottom of the List and Main screens.

Reports that analyze and output expense data are run from the List screen. See Chapter 22 for more information regarding OPAS reports and the types of reports that can be generated.

Chapter

12

Chapter 12 Instruments, Insurance and Transport Cases

Overview

These three related program areas manage the physical instruments that comprise the orchestra or ensemble, the insurance values and repair histories of those instruments, and the cases in which they are transported. Instruments can also be assigned to musicians in the orchestra or ensemble.

Information stored in these areas is also used in the Tour program area (see Chapter 18).

Instruments

Overview

The Instruments area of OPAS is used to manage the instruments used by your orchestra or ensemble, regardless of whether the instrument is owned by your organization, the musician who plays the instrument, or a third party.

To open the Instruments area, choose the Main Data | Instruments menu item.

The Instruments area is divided into three sections or screens:

- **List** - displays a list of all Instruments that meet the criteria you choose
- **Main** - displays all the pertinent information about a single instrument
- **Repairs, Values** - displays the repair history, insurance values, and cost estimates for a single instrument

The Instruments area opens in the "Basic Search" or "Green Screen" search mode if there are more than 1,000 instruments in the database (see Chapter 21), or on the List screen if there are fewer than 1,000 instruments.

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area's contents. In the Instruments area it displays name and description of the instrument, the artist who plays it, and the transport case to which it is assigned.

These columns can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column).

See Chapter 20 for more information on working with grids such as those on the List screen. The List screen is used extensively to execute Searches and Filters. See Chapter 20 for more information on searches and filters.

To see the details of any single instrument, click the mouse once anywhere in the desired row, and then click the Main tab at the top of the window. Or simply double-click the mouse anywhere in the desired row.

Main screen

The main screen is used to create and store the basic information about each instrument.

see illustration next page

The screenshot shows the 'Main' tab of the 'Instruments' screen in the OPAS database. The instrument is identified as 'Pöhlmann Rossi Double Bass'. The form includes the following fields and options:

- Name:** Pöhlmann Rossi Double Bass
- Description:** Specifications: Upper bout width: 20 3/4", Lower bout width: 29", Rib depth (incl top & back): 9 1/4", Playing string length: 42"
- Number 1, 2, 3:** BXS-00498
- Transport Case:** (Empty dropdown)
- Artist:** Bruya Leonid
- Owner:** Owner
- Rented:** Rented
- Insurance Value:** \$ 28,500.00
- Estimated Value:** \$ 28,000.00
- Book Value:** \$ 0.00
- Depreciation:** Depreciation
- Purchase Price:** \$ 27,450.00
- Date (Purchase):** 03/05/1991
- Date (Insurance):** 08/01/2000
- Date (Estimated):** 09/21/1999
- Notes:** (Empty text area)
- Right-side fields:** Code, Rent No., Start, End

Name / Code / Description - The name of the instrument, an abbreviation and description or history

Number 1, 2, 3 - These number fields are generic and provided for any numeric identification that may be required: serial numbers, inventory numbers, identification numbers, etc. Any number can be put in any field.

Artist / Owner - the artist who plays the instrument, and a check box that indicates this artist owns the instrument. Only members of your orchestra will appear on this drop-down list (see Chapter 4 for more information regarding Artists and orchestra member)

Price / Date fields - these indicate the price at which the instrument was purchased, and the various values of its insurance and estimates. Fields shaded in yellow indicate the data is read from the Repairs, Values screen

Rental data - indicates the instrument is rented, the rental agreement number and the time period for which the instrument is rented

Creating a new Instrument

To create a new instrument in the OPAS database, click the New icon in the lower right-hand corner of the screen, or press the



CTRL+N keys on your keyboard. This will cause the Main screen to become blank (white fields). New instruments are created on the Main screen. Each instrument requires at least a name to be created.

The New + Copy icon creates a new instrument based upon the one that is currently active.



The Save icon (or CTRL+S) saves changes. OPAS will display a prompt if you attempt to leave any screen without saving changes

The Delete icon (or CTRL+D) deletes the entire instrument record.



The Undo/Restore icon (or CTRL+R) reverses the most recent change to the screen. This action must be implemented before the Save button is clicked.

Click the Close button in the lower left corner, or press the Esc key on the keyboard to exit the Instruments area.

Repairs, Values screen

The four grids on this screen are used to track detailed financial information regarding an instrument.

Repairs

This grid stores a repair history for an instrument. Click the green "+" key to add a new repair record. A new window will open in which repair details are indicated:

Date - the date of the repair

Amount - the cost and account number to which the repair should apply

Text / Notes - any descriptive text regarding the person or company supplying the repair, and/or the nature of the repair

Instrument Maker - Instrument makers and/or Repair shops can be created in the OPAS Address Book (see Chapter 8) and assigned to the specific repair record

Estimates

This grid stores a history of estimates for the value of the instrument. The most recent value in this grid (the top row of the grid) will also appear on the Main screen. Click the green "+" key to add a new repair record. A new window will open in can be indicated:

Date - the date of the estimate

Amount - the estimated value of the instrument

Text / Notes - any descriptive text regarding this estimate

Insurance Values

This grid stores a history of insurance values for the instrument. The most recent value in this grid (the top row of the grid) will also appear on the Main screen. Click the green "+" key to add a new insurance valuation. A new window will open in which insurance details are stored:

Date - the date of the insurance valuation

Amount - the amount for which the instrument is insured

Text / Notes - any descriptive text regarding this valuation

Insurance Categories

In conjunction with the Insurance Values grid, this grid stores the various policies or categories for which the instrument is insured (for example, Theft, Fire, etc.). Click the green "+" key to add a new insurance category. A new window will open on which are stored:

Date - the date of the insurance policy

Category - the insurance policy or category. Choose the desired category from the drop-down list. To create a new category, click the word "Category" - and create the new category in the resulting window

Text / Notes - any descriptive text regarding this insurance category.

Transport Cases

Overview

The Transport Cases area of OPAS stores information regarding the cargo crates or cases used to transport instruments or equipment on tours or run-outs. The Instrument and Transport Case areas of OPAS are intertwined; data can be entered and updated between them in tandem. However, it is advised that Instruments are created first, then Transport Cases are created, and then Instruments assigned to Cases.

The Transport Cases area is divided into three sections or screens:

- **List** - displays a list of all Transport Cases that meet specific criteria
- **Main** - displays all the pertinent information about a single Transport Case
- **Instruments** - displays the Instruments assigned to the case.

The Transport Cases area opens in the "Basic Search" or "Green Screen" search mode if there are more than 1,000 cases in the database (see Chapter 21), or on the List screen if there are fewer than 1,000 cases.

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area's contents. In the Touring Cases area it displays name and description of the physical container.

These columns can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column).

See Chapter 20 for more information on working with grids such as those on the List screen.

To see the details of any single touring case, click the mouse once anywhere in the desired row and click the Main tab at the top of the window. Or simply double-click the mouse anywhere in the row.

Main screen

The main screen is used to create and store the basic physical information about each container.

Name / Code / Description - The name of the touring case, an abbreviation and description

Number 1, 2, 3 - These number fields are generic and provided for any numeric identification that may be required: serial numbers, shipping numbers, etc. Any number can be put in any field.

Value - the value of the case itself

Dimensions / Volume - enter the Weight (loaded), Height, Length, and Depth of the container. OPAS will then automatically calculate the volume and metric tonnage fields

Instruments screen

This grid lists all instruments that are assigned to the transport case.

To add an instrument to a container open that instrument in the Instruments area of OPAS (see the preceding section of this document). Clicking the "Instruments" button at the top left of the grid can also do this. In the middle of the Instruments Main screen, choose the desired touring case from the drop-down list.

Chapter

13

Chapter 13 OPAS Extended

Overview

Chapters 13 through 17 of this manual cover the “Extended” features of OPAS. These program areas are fully integrated with every other area of the software, and enable the User to:

- Create Artist contracts for soloists, choirs and guest conductors
- Create complete artist itineraries
- Maintain contract logs
- Analyze artist fee histories
- Integrate artist fees with other concert expenses
- Assign orchestra personnel to concerts, rehearsals and other activities
- Track attendance, absence, and extended leave
- Assign seating and indicate chair rotations
- Create personalized schedules for your orchestra members and substitutes
- Create contracts for orchestra members and substitutes
- Assign pay rates for salary, per-service fees, and any overages used by your orchestra
- Calculate payroll and run “what if” scenarios for orchestra members and substitutes
- Analyze payroll by the musician, section, project, season or any other time period
- Export payroll information to Excel or other digital formats
- Integrate payroll expenses with other concert expenses
- Create Tours for everything from simple one-city runouts to multi-concert foreign tours

- Assign musicians, guests, travel cases and other entities to the Tour
- Assign bus, hotel rooms, flight information and other travel details
- Create complete itineraries including hotel rooming lists

Each of these “Extended” operations are based upon scheduling and repertoire information already in OPAS - contracts, itineraries, and personnel matters are assigned to pre-existing concerts, rehearsals and other activities, etc. It is therefore recommended that you have some familiarity with basic OPAS functions before using the features outlined in Chapters 13 through 17.

Notes concerning OPAS Extended

If, when working through this manual, the program areas or menu items indicated here do not appear, then you must obtain an OPAS Extended license. Access to the program areas covered in Chapters 13 through 17 requires that an OPAS Extended license be installed. Contact Fine Arts Management for further details.

Because the areas of orchestra administration covered in OPAS Extended often vary greatly from organization to organization, OPAS has specifically been structured with flexibility and customization in mind. Program functions, reports, contracts and data analysis can be tailor-made to meet the needs of your orchestra, payroll system and musician contracts.

Chapter

14

Chapter 14 Guest Artist and Conductor Contracts

The Contracts area of OPAS is used to create performer, speaker and guest conductor financial agreements and contracts for any activity in the database. Contracts can also be created for orchestra personnel such as concertmasters and principal players. The agreements can specify performances and rehearsals, financial information, and the artist's travel itinerary. Contracts for non-performing personnel such as piano tuners or recording engineers can also be created.

A contract log can also be created and used to track the status of each agreement.

The term "contract" does not necessarily mean that a written document will be produced from OPAS, although this can certainly be done. "Contract" is simply a means of describing the agreement between your orchestra and another entity.

Before creating an artist contract, ensure that the appropriate expense categories (such as Performance Fee, Hotel, Travel, Transportation, etc) have been created in the OPAS database (see Chapter 11).

To open the Contracts area, chose the Main Data | Contracts menu item

The Contracts area is divided into seven sections or screens:

- **List** - Displays a grid or list of all contracts that meet selected criteria.
- **Main** - Displays basic logistical information about a single contract, and is used to create new contracts
- **Accounting / Arrangements** - Stores the financial details about a contract

- **Additional Data** - A customizable screen that displays selected User-defined data
- **To-Do List** - a customizable list of tasks for the contract in question. This is often used as a contract log
- **Schedule** - events or activities associated with this contract, but not part of the orchestra's schedule, items on this screen become part of the artist's itinerary
- **Documents** - links to external digital files related a chosen contract

As with other areas of OPAS, the Contracts area opens in the "Basic Search" or "Green Screen" search mode. To learn more about this Filter mode, see Chapter 21. If the demonstration database is used, simply press the F9 key and click Yes at the prompt to reveal all the contracts in the database.

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area's contents. In Contracts, it displays the Artist, Contract number and title, code, Season and Project for each contract in the database.

The columns on the screen can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column).

See Chapter 20 for more information on working with grids such as those on the List screen. The List screen is used extensively to execute Searches and Filters. See Chapter 20 for more information on searches and filters.

To see the details of any one contract, click the mouse once anywhere in that row then click the Main tab at the top of the window. Or simply double-click the mouse anywhere in the desired row.

Main screen

The Main screen contains all the general administrative details of the contract:

The screenshot shows the 'Main' tab of a software interface. The top navigation bar includes 'List', 'Main', 'Accounting/Arrangements', 'Additional Data', 'To-Do List', 'Schedule', and 'Documents'. The main area contains several data entry fields:

- Project:** Subscription Week 4
- Season:** 01-02
- Artist:** Lifschitz Konstantin
- Instrument:** Piano
- Job:** (empty)
- Engag. Reason:** (empty)
- Title:** KL-SUB4-02
- Contract No:** S4-02
- Agent:** Fine Arts Management
- Group:** Performance - Soloist
- Status:** Fully Executed

Below these fields is a 'Dates [4]' section with a table:

Date	Time	End	Project	Activity	Conductor	Venue	City
01/12/2001	10:30	01:00	Subscription Week 4	Dress Rehe	Kalmar, Carlos	Memorial	Arlington
01/12/2001	08:00	10:00	Subscription Week 4	Concert	Kalmar, Carlos	Memorial	Arlington
01/13/2001	03:00	05:00	Subscription Week 4	Concert	Kalmar, Carlos	Memorial	Arlington

Below the table is a 'Notes' section with the following text:

Northern Virginia Symphony debut
Contract covers 2 home concerts + run-out

Project - The Subscription, Tour, Recording or other project covered by this contract. See page 446 for more information regarding Projects. Note: it is not strictly necessary for a contract to be associated with a single Project, but it is strongly advised that this convention be followed. If a single contract or document is to cover more than one project, split the contract between its corresponding Projects.

Title - An internal title or name for the contract

Season - The concert season to which the contract pertains. See page 451 for more information regarding Seasons.

Contract No. - The first contract number is an internal number, created by you. It can contain any combination of up to 20 numbers and/or letters. The second number, in the gray field, is a number

automatically generated by OPAS and indicates the unique sequential number of this contract

Code -An internal abbreviation or Code

Artist - The artist or ensemble covered by this contract. Note that only artists or ensembles assigned the Address Group Soloist and Venues will appear on this list. See page 425 for more information regarding Address Groups, Chapter 4 for more information regarding Artists and Chapter 8 for more information regarding the OPAS Address Book and venues

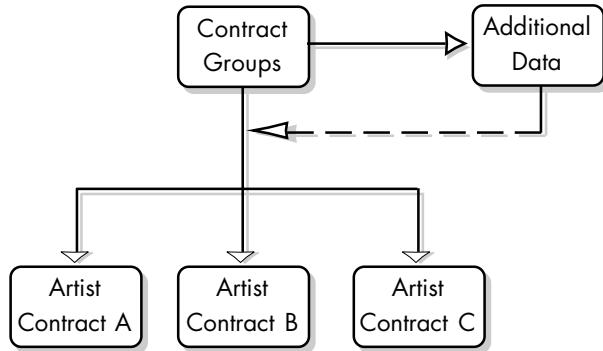
Instrument - Once an artist or ensemble has been assigned, the Instrument(s) associated with the artist will appear in this field.

Agent - Any Management firm(s) assigned to the Artist. Management firms are created in the OPAS Address Book; see Chapter 8 for more information

Job - This field allows for further classification of contracts, primarily for non-performance contracts. If OPAS is used only for performance contracts, this field may not be needed. Create the contents of the drop-down field by clicking the button that labels the field.

Group - Contracts in OPAS are organized by category. This field is optional, but greatly aids in analysis and reporting of contracts, fee histories, etc. The group to which the contract belongs will dictate the contents of the Additional Data screen.

see illustration on the next page



Contracts belong to Contract Groups. Additional Data screens are configured for different Contract Groups. Therefore, the Additional Data screen for an individual contract is dictated by the group to which it belongs.

To create contract groups, click the field label "Group" or choose the Background Data 2 | Contract Groups menu item.

This will open the Contract Groups area in which contains two screens. The **Main** screen is used to create new contract groups.

Examples of Contract Groups might be:

- Performance: Soloist
- Performance: Conductor
- Performance: Choir
- Independent Contractor
- Venue
- Etc.

The **Additional Data** screen is used to set the additional data for this contract group- Each distinct contract group can have a corresponding set of Additional Data fields. These Additional Data fields store information not found on other screens in the Contract area.

For example, piano or other special requirements for soloist contracts can be indicated, the "Pay To" entity for the contract, etc.

See page 420 for more information on configuring the Additional Data screen

Status - The contract status is a general indication of the contract (proposed, cancelled, final, etc) and not the specific status of the document itself (awaiting signature, with manager, etc). The status of the physical document is tracked on the To-Do screen. To create contract statuses, click the field label "Group" or choose the Background Data 2 | Contract Groups menu item.

Dates grid - this grid stores all the Activities or Dates included in the Artist contract. Only Activities that are part of the Project to which the Artist has been assigned will appear when the green "+" icon is clicked.

Notes - any text or notes regarding this contract.

Creating a new Contract

To create a new artist or ensemble contract in the OPAS database, click the New icon in the lower right-hand corner of the screen or press the CTRL+N keys on your keyboard. This will cause the Main screen to become blank (white fields). New contracts are created on the Main screen. Fill out the various fields on the Main screen - a contract requires at least an Artist to be assigned. The more complete the information on the Main screen, the easier it is to generate printed contracts, and to find this contract record at a later date.



Once the Main screen is filled out, save the contract and fill in the information on the other screens indicated in the other sections of this chapter.

The New + Copy icon creates a new contract based upon the one that is currently active.





The Save icon (or CTRL+S) saves changes. OPAS will display a prompt you if you attempt to leave any screen without saving changes

The Delete icon (or CTRL+D) deletes the entire contract record.



The Undo/Restore icon (or CTRL+R) reverses the most recent change to the screen. This action must be implemented before the Save button is clicked.

Accounting / Arrangements screen

The Accounting / Arrangements screen stores all the financial information for the contract. Any number of different financial components - for example fee, hotel, and transportation - can be combined in one contract.

Expenses grid - this top grid stores the fee amount(s) for the Contract, and the description of each amount. To add a fee or financial component of the contract, click the green "+" icon, which will display the Expenses window.

Order	Total	Type	Text	Date	Fixed
A01	\$ 3,750.00	Artist Fee: Soloist	Subscription Concerts	03/02/2002	<input checked="" type="checkbox"/>
A02	\$ 1,850.00	Artist Fee: Soloist	Run-Out in Charlottesville	03/02/2002	<input checked="" type="checkbox"/>
A03	\$ 750.00	Transportation: Soloist		03/02/2002	<input checked="" type="checkbox"/>
\$ 6,350.00					

The expense screen in the contract section is identical to that of all other expense functions in the software. See chapter 11 for more information on entering expenses. The data entry most pertinent to contracts is as follows:

Indicate the **Expense Type** and **amount** at the top of the screen. If you wish to record a per-performance fee, and have OPAS calculate the total based upon the number of performances, put the number of performances in the Number field, and

the per-performance fee in the Amount field. Otherwise, place the total fee in the Amount field.

The **Date** field on the Expense screen will be the date the contract payment is due. This is typically the first performance date, but can be any date. OPAS will calculate the appropriate Season based upon the due date.

OPAS automatically assigns the Artist as the "**Address**" to which the expense pertains. It is advised that the value be left as it is so that expense filtering and reporting is easier and more accurate

The **Order** field will dictate the order of multiple expenses (such as a fee plus a travel expense) appear both in the Expenses grid and on printed contracts.

The **Contracts Accounting** grid is only used when the contract is for an orchestra member. Contact Fine Arts Management for more information regarding the integration of contract areas and personnel areas.

The **Arrangements** field is used to store conditions, notes or other information regarding the financial details of the contract. These are frequently details that are included in the printed contract or letter of agreement.

Additional Data screen

The Contract Group to which the individual Contract belongs will dictate the contents of the Additional Data Tab. See the previous section of this document for more information. Information stored on this screen can be output into artist contracts and other reports.

See page 422 for more information and examples regarding the Additional Data screen.

To-Do List screen

The To-Do List stores a list of tasks that must be completed for this contract - these can be the status of the contract execution, mailing of other documents, receipt of information from the Artist, etc. These tasks can be pre-assembled in a series of "Templates" and/or they can be individually added.

Order	Priority	Code	Job	planned	Time	Person	Status	done	Notes ...
1	1	COut	Contract Out	09/21/2001	12:00 AM	JLK	DONE	09/21/2001	Returned with P
2	1	CRet	Contract Returned	09/21/2001	12:00 AM	JLK	DONE	10/24/2001	Awaiting voucher
3	1	Hotel	Hotel Booking	01/08/2002	12:00 AM	RT	Pending	//	//
4	1	Itin	Itinerary Distributed	//	12:00 AM		Pending	//	//

The To-Do List in the Contract area of OPAS is identical in form and function to the To-Do List in other areas. See Chapter 9 for complete instructions on creating Templates, assigning Items, and changing item statuses.

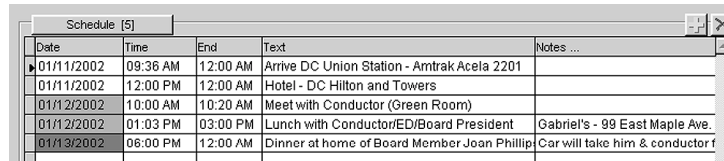
To edit any single line item in the To-Do grid, double-click the line or click the ToDo-List button at the top left of the grid

To create a new To-Do List item, click the green "+" icon to display the To Do List Main screen, and then fill out the appropriate information for a new task.

Schedule screen

The Schedule screen stores the details of events or items regarding this Artist's contract and appearance with the orchestra. These can be travel or transportation details, interviews, meetings, receptions, etc. These events are specific to this artist (or ensemble) and his/her appearance with the orchestra, but are not part of the orchestra's overall schedule.

The activities in this grid can be combined with the rehearsals and performances indicated on the Main screen to create a complete itinerary for the artist.



Date	Time	End	Text	Notes ...
01/11/2002	09:36 AM	12:00 AM	Arrive DC Union Station - Amtrak Acela 2201	
01/11/2002	12:00 PM	12:00 AM	Hotel - DC Hilton and Towers	
01/12/2002	10:00 AM	10:20 AM	Meet with Conductor (Green Room)	
01/12/2002	01:03 PM	03:00 PM	Lunch with Conductor/ED/Board President	Gabriel's - 99 East Maple Ave.
01/13/2002	06:00 PM	12:00 AM	Dinner at home of Board Member Joan Phillip	Car will take him & conductor f

To create a new Schedule item, click the green “+” icon to display the Schedule screen and fill out the appropriate information for a new task.

To edit any schedule item, double-click the line or click the Schedule button at the top left of the screen.

Chapter

15

Chapter 15 Orchestra Personnel - Configuration, Attendance and Assignments

Overview

This chapter concerns defining the musicians (both staff and substitutes) who comprise your orchestra or ensemble, the pay rates, and leave types used by your orchestra. Once these elements are configured, musicians can be assigned to activities, can be assigned extended or advanced leave, and payroll can be calculated.

If you are using the OPAS demonstration database, all background information has already been configured, and you can skip down to page 230 for information on assigning musicians to activities.

Configuring Orchestra Personnel

Creating Orchestra Members

Orchestra members are created and managed in the Artist area of OPAS, as are all other performers. This program area will store the name, address, and instrument played by the musician. On the Personal Data screen, store social security numbers, Union affiliation, tax numbers and other confidential personnel information. See Chapter 4 for complete details on creating artists.

As with other artists in the database, each orchestra member will belong to an Address Group. Orchestra musicians are distinguished from other artists in OPAS in that the Address Group assigned to the musician is in turn part of the System Group "Staff" or "Substitute". Within each of these two System Groups, create as many individual Address Groups as your orchestra requires.

Examples of possible Address Groups are:

System Group (set by OPAS)	Address Group (created by you)
Staff	Orchestra Member Orchestra Part-Time Pops Orchestra Chamber Ensemble Member Retired Orch. Member
Substitute	Orchestra Substitute

See page 425 for more information on creating and modifying Address Groups. Remember that orchestra members can belong to multiple Address Groups: "Orchestra Member" and "Soloist", "Orchestra Member" and "Substitute", etc.

Configuring instruments and sections

Before orchestra musicians can be assigned to activities, the instruments they play must first be properly configured, as OPAS assigns musicians based upon the instrumentation of the programmed compositions. In most instances, the OPAS database has already been properly configured, and this section of the manual is for information purposes only.

Each section of the orchestra belongs to an Instrument Group. Much like System Groups, Instrument Groups are programmed into OPAS and cannot be changed by the User.

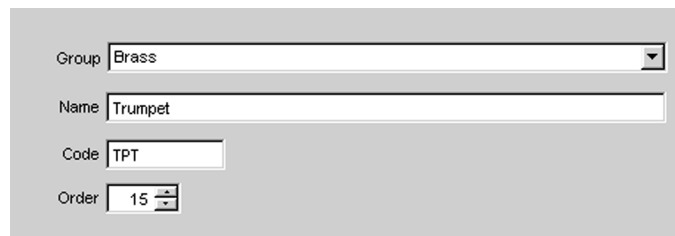
Instrument Groups in OPAS are:

Brass
 Extra
 Keyboard
 Others
 Percussion
 Strings
 Vocal
 Woodwind

Each Instrument Group in turn contains as many or as few Sections as necessary; new sections that best reflect your orchestra can be created. An overview of the data hierarchy and some examples of Section Names are:

Instrument Group (set by OPAS)	Section Name (created by you)
Brass	French Horn Trumpet Trombone Tuba

Instrument Sections can be created or modified by selecting the Background Data 1 | Sections menu item. Sections are created, edited and deleted just like other data in OPAS. The Main tab displays the information that is kept for each Section:



Group

Name

Code

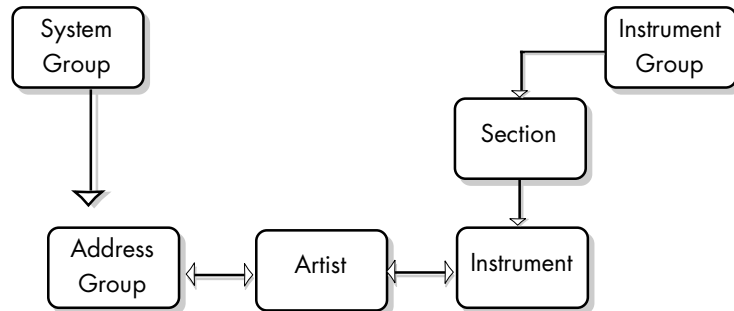
Order

Finally, individual instruments must be assigned to their respective Instrument Section. From the main screen in OPAS, select the Background Data 1 | Instruments menu item.

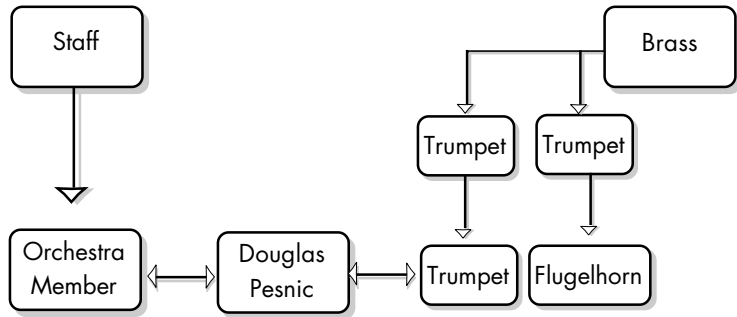
As the example shows, there can be a wide variety of Instruments (in this case different types of trumpets) that any given individual can play. Each of those instruments belongs to the same orchestra Section (in this case, "Trumpet"). That Section is in turn a member of an Instrument Group (in this case, "Brass").

Name	Code	Section
Alto Trumpet	At	Trumpet
Flugelhorn	FH	Trumpet
Bass Trumpet	Bt	Trumpet
Cornet	CR	Trumpet
Soprano Buccine	SB	Trumpet
Tenor Buccine	TB	Trumpet
Serpent	SE	Trumpet
Trumpet	Tp	Trumpet

This organization of Artist and Instrument data can be represented:



Or with data as it might appear in OPAS:



Creating Attendance Types

The various ways in which a musician can either be present or absent at an activity must also be created. In OPAS, these are referred to as "Presence Types". Presence Types provide a way of defining the actual manner of a Musician's presence at an activity. They are set from the Background Data 2 | Presence Types menu item.

Presence Types 1 [Present]

List

Name

Code

Present Stand By

Present %

Free %

Per Diem %

Pay Amount %

Name - the descriptive Name of the Presence type

Code - a 1-3 letter abbreviation of the Presence type - this code will be displayed in the Attendance module (covered in the following sections) - do not leave it blank

Present / Stand By - a check in the first box indicates that whatever the Name of the Presence Type may be, it indicates that the musician is physically present. Conversely, all absences should have the Present box un-checked. A check in the second indicates that the musician is considered to be on Stand By, and this field can be used when calculating attendance or payroll.

Present / Free / Per Diem / Account % Fields - each of these can be used to further define the quality of the Presence type and are used when factoring both attendance and payroll calculations. For the majority of presence types used by U.S. orchestras, these values will either be 0% or 100%.

Present - indicates the percentage of credit the musician gets for the service. For example, if a concert is a single service, and the Presence Type "On Call" is set to Present 50%, then any musician assigned to the concert "On Call" will be credited .5 services.

Free - identical to the Present % function, but for absences. Again, unless a certain type of absence does not "count" as a full absence, set all absence types to 100%

Per Diem - the percentage used when calculating Per Diem rates

Pay Amount - used when calculating payroll. For per-service orchestra pay rates, OPAS will multiply the pay rate for the service by this percentage to arrive at the amount due to the musician. For example, if a concert is assigned a pay rate of \$100, and the "On Call" Presence Type is set to Account 50%, then a musician assigned to the concert "On Call" will receive \$50. For salary-based orchestras, this number can be set to 100% at all times. This feature and function is covered in Chapter 16, Orchestra Payroll.

Amount - This field is only used if the Presence Type is always associated with the same Pay Rate. It is an optional field, and only used for organizations that pay personnel on a per-service basis. In most instances, this field can be left blank.

Color - The color that corresponds to this Presence Type. As with Codes, this color will be used extensively in the Duties Planning module (covered next in this document) - be sure to assign a color to all Presence Types.

Creating and Assigning Extended Leave

Any Presence Type that is actually an Absence Type (that is, the "Present" check box is *un*-checked) can be assigned to any artist for any time period. In this way, Extended or Advance Leave can be indicated for orchestra members and substitutes. When a musician on extended leave is assigned to an activity that falls within the leave period, OPAS will indicate that a Presence Type (the absence or leave type) has already been assigned.

Examples of extended or advanced leave may be sabbatical, maternity leave, assigned leave, vacation, etc. OPAS stores each separate assignment of leave with the musician's record. This provides not only an overview of the entire orchestra's attendance and leave assignments, but a permanent archive of every musician's vacation and leave history.

Extended Leave is assigned to a musician in the Artist Accountings area of OPAS. To open the Artist Accounting area, choose the Main Data | Services | Artist Accounting menu item.

The Artist Accounting area will open in the "Basic Search" or "Green Screen" search mode. To learn more about this search mode, see Chapter 21. If the demonstration database is being used, simply press the F9 key (and click Yes to the prompt) to reveal all the artists in this area.

Extended or Advance leave is set on the Absences/Vacation screen:

FILTER: Artists Accountings 1 [Stadelman Beth]			
List	Main	Accountings	Absences/Vacation
Absences [1]			
First Day	Last Day	Type	Notes ...
02/01/2002	03/15/2002	Discretionary Leave	Approved by Personnel Manager on Dec. 3, 2001

Click the green “+” icon at the top right of the grid to add a new extended leave or absence to this musician’s record. Each extended leave or vacation has a:

Start / End Date – Start and End dates do not need to be within the same season. Extended Leave can overlap (there can be more than one type of leave or absence within the same time period).

Presence Type – Only Absences (that is Presence Types with the “Present” check box un-checked) can be assigned

Notes – optional notes that describe or edify the absence.

A special character in the Service Attendance area of OPAS will display advance or Extended Leave. See the “The “!” character and advanced leave” section of this manual.

Creating Service Parameters

In addition to Presence or Attendance Types, the maximum number of Services or Free Days that a musician must have within a given time period can be set.

OPAS uses the term “Points” to define the number of services, work days, and/or free days that orchestra personnel can perform in a given season. Use of these numbers is optional; they are used in conjunction with personnel assignments to monitor and analyze the amount of work each orchestra member or substitute performs.

Work parameters can be set in two areas of OPAS:

1. The Seasons program area. See page 451 for instructions regarding service restrictions or guidelines for a concert season. When “Points” are assigned in the Seasons program area, those service restrictions apply equally to all members of the orchestra.

2. The Artist Accounting area of OPAS. Service restrictions created in this program area apply only to the artist with which they are associated.

The Artist Accounting area is a sub-set of the Artist area, and issued for orchestra personnel and substitutes. This area is covered in detail in Chapter 16.

To open the Artist Accounting area, choose the Main Data | Services | Artist Accounting menu item.

The Artist Accounting area will open in the "Basic Search" or "Green Screen" search mode. To learn more about this search mode, see Chapter 21. If the demonstration database is used, simply press the F9 key to reveal all the artists in this area.

Work parameters are set on the Main screen of this program area, in the "Services" grid at the bottom of the screen. Click the green "+" to create a new set of work parameters for a given season, or to edit existing parameters.

The Season field indicates the concert season to which these parameters or limits pertain, and the Text field is used for any optional description or note.

Days	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	Free Days	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Srvcs.	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	Free Svcs	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Hours	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	Free Hours	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Days %	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	Free Days %	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Service %	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	Free Svcs %	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Hours %	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	Free Hours %	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

The number fields that make up the bulk of the screen are used to indicate the service limits or parameters for the indicated season. Each category of service parameters has two numbers - the left number typically indicates the number for the season, and the right number indicates the number for a User-Defined time period. How-

ever, the two numbers can also be used for related subsets of data. For example, the left number might indicate the total for a Season and the right number for a month. Or, the left number may be for the main Symphony and the right for the Pops orchestra. Any relationship can be given to the fields, so long as it is done so in a consistent manner. All fields on this screen are optional and as many or few can be used as are required.

Days - The maximum number of Work Days the Artist may have in the Season. This may be expressed as a number or as a percentage of all Work Days for the orchestra

Services - The maximum number of services the Artist may have in the Season. This may be expressed as a number or as a percentage of all services for the orchestra

Hours - The maximum number of hours the Artist may work in the Season. This may be expressed as a number or as a percentage of all hours for the orchestra

Free Days - the number of Free Days the Artist must have in the Season. This can be expressed as a number, or as a percentage of all days (for example, 5% of all Work days must be free)

Free Services - the number of Free Services the Artist must have in the Season. This can be expressed as a number, or as a percentage of all services.

Free Hours - the number of Free Hours the Artist must have in the Season. This can be expressed as a number, or as a percentage of all hours worked.

Note that OPAS stores this information for a number of seasons. When calculating the Artist's assignments (see the next section), OPAS will extrapolate the Season and associated service parameters from the date of the Activity. This feature also provides an automatic archive of an Artist's work parameters.

Assigning Orchestra Members to Activities

Service Attendance

Overview

Orchestra members and substitutes can be assigned to any activity in the database. Personnel is assigned according to section within the orchestra, and OPAS tracks the number of musicians needed within each section based upon the instrumentation of the works programmed. Musicians can further be assigned or removed from specific works within a single activity, and seat rotations or other performance notes can be indicated.

Assigning Orchestra Members is done in the Service Attendance area of OPAS. To open the Service Attendance area, choose the Main Data | Services | Service Attendance menu item

Personnel can be added to Activities for a wide variety of time periods:

- an entire Season at a time
- for all activities within a given calendar week
- for all activities within a given production week
- for all activities in a specific Project
- for a specific activity within a Project
- for a specific date range

The Service Attendance of OPAS has only a Main Screen, and the screen re-configures itself based upon the method of assignment chosen. The Service Attendance area always opens to a blank screen.

Assigning musicians to activities is a simple three-step process:

- 1 Define the orchestra section and time period
- 2 Click the Refresh button at the bottom of the screen to load the section
- 3 Assign the musicians in the section

Defining the Time Period and Orchestra Section

Section	<input type="text"/>	<input type="checkbox"/> Staff	default/first	Present	P	Show Code		
Season	<input type="text"/>	Week	<input type="text"/>	<input type="checkbox"/> Substitutes	second click	Sick	S	Show Hours
Project	<input type="text"/>	PW	<input type="text"/>	<input type="checkbox"/> all	third click	Assigned Vacat	VAC	Set to Default
Date	//	-	//					

Section - Beginning on the left side of the screen, choose the Section of the Orchestra to be assigned - the drop-down list contains all the basic sections of the orchestra as represented on standard OPAS Instrumentation screens. If no section is chosen, OPAS will display the entire orchestra roster, in alphabetical order (this can significantly slow the operation of the Attendance screen)

Season - The Season must be selected before any of the other fields can be chosen

Finally, select any of the remaining drop-down fields based upon the desired time period

Week - select a Calendar Week of the chosen Season. As in the Dates area, the first number indicates the year and the second number indicates the week. Only weeks in which activities have been scheduled will appear in the list

PW - select a Performance or Production week of the chosen Season. The Production Week is counted from the start of the Season (see page 451 for more information). Only weeks in which activities have been scheduled will appear in the list

Project - select a specific Project within the chosen Season

From Date / To Date - select a Date Range within which all activities will be displayed

No Selection - if each of the Week, PW, and Project fields are left blank, then the Attendance grid will display the entire chosen Season

The three middle buttons indicate if the grid will display Staff musicians, Substitutes, or both (All). See the first section of this

chapter and page 425 for more information regarding Address Groups and staff/substitute musicians. It is recommended that the default setting, Staff, remain selected.

Presence Types - The next three drop-down fields will display the three most often-used Presence (or Absence) Types. (Presence and Absence types are discussed in the previous sections of this chapter). It is recommended that the first drop-down field reads "Present", and the other two can be any logical Presence or Absence types.






The final three buttons along the top of the screen can be toggled once the grid has displayed.

Loading the Attendance Grid

Click the Refresh button in the lower right-hand corner of the screen. This will load the activities within the time period selected, and all the orchestra personnel within the selected section.

Each column in the main portion of the screen will display pertinent information about the chosen activities, based upon the time period selected.

If displaying information for a **Week** or **Production Week**, each column will be a distinct activity. The column will indicate:

Date	12/03/01	12/04/01	12/07/01	12/08/01	12/08/01
Project	SUB 03	SUB 03	SUB 03	SUB 03	SUB 03
Activity	STRh	REH	REH	Dress	CONC
Svcs.	1.0	1.0	2.0	1.0	1.0
Instrumentation	8	8	8	8	8
open	8 	8 	8 	8 	8 

Date - indicates the Date of the activity

Project - the Project Code to which the activity belongs

Activity - the shorthand Code of the activity itself

Services - the number of Services assigned to this activity

Instrumentation - The number of instruments required of the chosen section. OPAS calculates this number from the Dates/ Works area of the particular activity (see Chapter 7). It will reflect the Max number from the Program screen of the specific Activity.

Open - This number indicates the number of instruments that have not yet been assigned from the chosen orchestra section

If displaying information for a specific **Date Range** or a specific **Project**, each column will be a distinct activity within that Project. The column will indicate:

Date	12/03/01	12/04/01	12/07/01	12/08/01	12/08/01
Activity	STRh	REH	REH	Dress	CONC
Svcs.	1.0	1.0	2.0	1.0	1.0
Instrumentation	8	8	8	8	8
open	8 ▶	8 ▶	8 ▶	8 ▶	8 ▶

Date - indicates the Date of the activity

Project - the Project Code to which the activity belongs

Activity - the shorthand Code of the activity itself

Services - the number of Services assigned to this activity

Instrumentation - The number of instruments required of the chosen section. OPAS calculates this number from the Dates/ Works area of the particular activity (see Chapter 7). It will reflect the Max number from the Program screen of the specific Activity.

Open - This number indicates the number of instruments that have not yet been assigned from the chosen orchestra section

If displaying information for an entire **Season** (that is, the Week, PW, Date and Project fields are empty), each column will be a distinct Project. The column will indicate:

See illustration next page

Project	BEN	EDU	FAM 01	PARK	SUB 01
Conductor	Kalmar	Ling	Kalmar	Seaman	Kalmar
Svcs.	2.5	1.0	4.0	2.0	5.0
Instrumentation	8	8	8	8	8
open	8	8	8	8	8

Date - indicates the Date of the activity

Conductor - the last name of the Conductor assigned to the activities within the Project

Services - the number of Services assigned to this activity

Instrumentation - The number of instruments required of the chosen section. OPAS calculates this number from the Dates/ Works area of the particular activity (see Chapter 7). It will reflect the Max number from the Program screen of the specific Activity.

Open - This number indicates the number of instruments that have not yet been assigned from the chosen orchestra section

Orchestra Personnel will be listed down the left side of the screen. Musicians appear in seat order (see page 240 of this section for more information regarding seat order and rotations). If no seat order is indicated, then musicians appear in alphabetical order.

The far right columns - Max, Free, Pres. Res. - indicate the number of maximum or required services and free days for each musician, and keep a running comparison of those limits against the assignments made in the grid. This concept is covered further on page 237.



Note: Only those activities and Projects that have so designated will appear in the Service Attendance grid. This makes it possible to omit both administrative activities such as meetings, travel, auditions, etc. and artistic activities such as chamber music concerts for which orchestra attendance is meaningless. On the Main screen of both the Activities program area (Background Data 1 | Activities) and the Projects program area (Main Data | Projects) is a check box that reads "Services." A check in that box indicates that the Project/ Activity will appear in the Service Attendance area. See pages 419 and 446 for more information regarding Activities and Projects.

Assigning Musicians

Assigning a musician entails matching a musician (row) with an activity (column) and a Presence Type (color). Each cell in the grid represents the musician's participation in the activity - the Presence Type represents how that musician participates.

There are several ways to indicate each musician's participation in the Activities displayed in the grid.

Select the Musician - clicking a musician's name will assign the musician to all activities in the row. The presence type assigned will depend on the number of times the musician's name is clicked. Clicking the mouse once will set the participation or Presence Type to the default/first type. Clicking the mouse twice will set the participation or Presence Type to the type labeled "second click", and clicking the mouse three times will set the participation or Presence Type to the type labeled "third click". Or, right-clicking the mouse on the Musician's name will reveal a list of all Presence Types, and the desired type can be selected.

Select the Column - clicking a column heading (anywhere in the yellow column heading) will assign all musicians to the activity or activities in the column. If the column represents an activity, the musicians are assigned to an activity. If the column represents a Project, then all musicians are assigned to all activities within the Project. The presence type assigned to each musician will depend on the number of times the column heading is clicked. Clicking the mouse once will set the participation or Presence Type to the default/first type. Clicking the mouse twice will set the participation or Presence Type to the type labeled "second click", and clicking the mouse three times will set the participation or Presence Type to the type labeled "third click". Or, right-clicking the mouse in the column heading will reveal a list of all Presence Types, and the desired type can be selected.

Select a specific musician and activity - clicking a single cell within the grid will assign the single musician in that row to the single activity or Project in the column. If the column represents a Project, then the single musician is assigned to all activities within the Project. The presence type assigned will depend on the number of times the cell is clicked. Clicking the

Date	12/03/01	12/04/01	12/05/01
Project	SUB 03	SUB 03	SUB 03
Activity	STRh	REH	RE
Svcs.	1.0	1.0	2.0
Instrumentation	8	8	8
open	8	7	8
McDaniel, D.	-	-	-
Wasserman, T.	-	-	-
Howard, W.	-	-	-
Matsuchi, K.	-	-	-

mouse once will set the participation or Presence Type to the default/first type. Clicking the mouse twice will set the participation or Presence Type to the type labeled "second click", and clicking the mouse three times will set the participation or Presence Type to the type

labeled "third click". Or, right-clicking the mouse in the cell will reveal a list of all Presence Types, and the desired type can be selected

Click the "Set to Default" button - clicking the "Set to Default" button in the upper right hand corner of the screen will set all musicians in all activities/Projects to the Presence Type labeled "Default/First". If the columns represent Projects, then every musician is assigned to all activities within each Project. This can be an efficient way to assign large blocks of musicians to many activities at once. For example, if the chosen section is Flute, and the chosen time period is only the 2002-03 Season, then the grid will display each Project for the 2002-03 season, and each flutist in the section. If the "Default/First" Presence Type is "Present", and the "Set to Default" button is clicked, then each flutist in the section will be assigned to each Project and corresponding activity within the entire Season. Then, individual musicians can be removed from individual Projects or activities as needed.

OPAS adheres to this hierarchy when assigning musicians on the Attendance screen:

- 1 "Set to Default" - this button takes precedence over all other methods of assigning musicians. If a musician is already assigned to an activity/Project, the "Set to Default" button will over-write that assignment.
- 2 Select Musician / Select Column - this method takes precedence over the individual selection of a musician and activity. If a

musician is assigned to an individual activity, selecting the musician row or the activity/Project column will over-write that assignment.

- 3 Specific musician and activity - this method has the lowest priority, and an individually selected cell (musician + activity) can be over-written by any of the above methods.

Using this hierarchy as a guideline, it is recommended that either the "Set to Default" button, selecting a musician row, or selecting an activity/Project column be used as the primary method of assigning musicians (methods 1,2 and 4 above). Assignments can then be adjusted on an individual basis using method 3 above.

As musicians are assigned, the number of "Open" musicians or chairs will decrease. When the number of assigned musicians equals the number required by the program's instrumentation, the "Open" number will be zero. A negative number indicates that there are more musicians assigned than the program requires.

Svcs.	1.0	1.0	
Instrumentation	8	8	
open	0	1	
McDaniel, D.	-	-	
Wasserman, T.	-	-	
Howard, W.	-	-	

Click the Save button to save the musician assignments

The "!" character and advanced leave

When the Refresh button is clicked to load the Service Attendance grid, some cells may display an exclamation point (!). This character

indicates that the musician has already been assigned advanced leave or an advanced absence for the date on which the activity (or Project) falls -

Date	12/03/01	12/04/01	12/07/01	12/10/01
Activity	STRh	REH	REH	Dre
Svcs.	1.0	1.0	2.0	1.0
Instrumentation	2	2	2	2
open	2	2	2	2
Howenstine, D.	-	-	-	-
James-Furlie, R.	-	-	-	-
Royce, T.	!	!	!	!
Wasserman, T.	-	-	-	-

examples may be sabbatical, maternity leave, assigned leave, etc.

The exclamation point indicates that OPAS has detected some kind of advanced leave, but does not know exactly *what* that leave is. To display it, click the musician's name. This will fill the musician's row with the default Presence Type in the upper right of the screen - this may seem like a mis-assignment, but it is only temporary. Next, click the Save button in the lower right corner. OPAS will display and save the advanced leave that has been assigned to the musician.

See the "Creating and Assigning Advanced Leave" section of this chapter for instructions on setting advanced leave.

Display Options

Toggling the Show Hours and Show Code buttons in the upper right-hand portion of the screen can alter the grid display.

Show Hours - will replace all "Service" information with "Hour" information. That is, instead of indicating that a Rehearsal constitutes a single service, it will indicate that a Rehearsal was 2.5 hours long. Likewise, the rightmost columns that total the assignments for each musician will convert services to hours.

Show Code - displays the Presence Type Code. This code is

assigned when the Presence Type is created (see above). This feature is particularly helpful when there are multiple Presence Types represented on the grid at one time.

Conductor	Kalmar	Ling	Kalma
Svcs.	2.5	1.0	4.0
Instrumentation	3	2	2
open	1	0	-2
Ostrovky, M.	Abs	Call	P
Sharo, M.	Call	F	P
Slakins, J.	P	P	P
▶ Davidson, A.	P	P	P

Service Totals for each musician

The right-hand side of the screen calculates the totals for the time period chosen and for each individual artist in the grid.

In the top portion of the grid, the number in the Pres. column indicates the total number of Services (or Hours if the "Show Hours" button is clicked) included in the time period or Project.

The lower portion of the screen indicates four different totals for each artist:

Max - indicates the Maximum number of Duties or Hours to which the Artist may be assigned for the selected time period. This number is defined in the Artist Accounting area of OPAS. See page 226 of this chapter for instructions on setting service parameters

Free - indicates the number of Duties or Hours within the time period to which the Artist has been assigned an Absence Type

Pres. - indicates the number of Duties or Hours within the time period to which the Artist has been assigned a Presence Type.

Res. - indicates the number of Duties or Hours within the time period in which the Artist is in Reserve or Stand-by.

To calculate these figures, OPAS refers to Presence Type assigned to the Artist. If, for that Presence Type:

- there is a check in the "Present" box, then the number in the Pres column is increased by the number of Duties or Hours
- there is not a check in the "Present" box, then the number in the Pres column is not increased
- there is a check in the "Stand By" box, then the number in the Res column is increased by the number of Duties or Hours
- there is a check in both the "Stand By" and "Present" boxes, then the number in both the Pres and Res columns is increased

See page 223 of this chapter for more information on setting attendance types.

OPAS will calculate these figures dynamically (that is, as artists are assigned), if the "automatic Calculation" box is checked at the bottom of the screen. If it is not checked, then OPAS will not

calculate the figures
in the right-most
column until the

automatic Calculation

Calculate Services/Instr.

“Calculate” button (to the right of the box) is clicked. Unless there is a specific reason to do so, it is advised that the “automatic Calculation” button remain un-checked, and that you manually click the “Calculate” button when services or hours need to be calculated. This can speed the operation of this program area, particularly when working with large instrument sections.

Other Service Attendance features and functions

Right Mouse Click - To assign a Presence or Absence Type that is not among the three represented in the drop-down menus at the top of the screen, right-click the mouse on either the musician’s name, the column heading, or a single cell. This will bring up a menu that contains all Absence and Presence Types. Simply click (left-click) the desired type.

Removing an Assignment - to remove an assignment made in error - before the record is saved - right-click the mouse on either the musician’s name, the column heading, or a single cell. This will bring up a sub-menu. Click (left-click) the third item from the top: “Restore Record”. This will remove the assignment.

Deleting an Assignment - to remove an assignment after it has been saved, right-click the mouse on either the musician’s name, the column heading, or a single cell. This will bring up a sub-menu. Click (left-click) the last item on the list: “Delete Service”. This will remove the assignment.

Dates Area Link - to load the Dates area of OPAS with the related concert or rehearsal programs, click the Dates button at the bottom of the screen.

Restricting Projects and Activities from Attendance

It is possible to define the specific Projects and Activities that appear in the Service Attendance area of OPAS. This feature is primarily intended to exclude those Projects and/or Activities that do not

involve the main orchestra - such as chamber music concerts, administrative events, auditions, recitals, etc.

On the Main screen of both the Projects area of OPAS and Activity are there is a single check box labeled "Services". A check in this box indicates that the Project or Activity in question will be included when assigning personnel in the Duties Management section.

Musician and Seat Assignments for Distinct Works

OPAS provides the ability to assign orchestra personnel to individual works within an activity. The musician must be assigned to the activity itself before individual work assignments can be made. Once a musician is assigned to particular work(s) in the program, notes about seating assignments, doublings, or other instructions for those works can be made.

When the Service Attendance grid is configured for a Project, Week or Production week, each column of the grid represents a single activity, and a right-pointing arrow appears at the top of each column. Clicking this arrow will display the works on the program, in program order. If the width of the column truncates the title of the work, float the mouse over the column heading to reveal the entire title.

svcs.	1.U
Instrumentation	8
open	8
McDaniel, D.	-
Wasserman T	-

A musician assigned to the activity is automatically assigned to all works on the activity. Musicians can be removed from individual works by un-checking the relevant box. This is intended particularly for woodwind and brass sections in which musician assignments can change throughout a concert, or to indicate string reductions.

The illustration on the next page shows an expanded program for a concert on November 17. This particular attendance grid is for the viola section - note that the Haydn symphony requires 8 violas, but the Mendelssohn Hebrides Overture requires 10. The two "un-checked" musicians (white cells) have been removed from only the

01	11/17/01		Mende		Haydn	Br
	CONC		HEBRH		SYMPH	Ci
	0.0			8		
	10	10		0		10
▶	0	◀				0
	-	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
	-	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
	-	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input checked="" type="checkbox"/>
	-	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input checked="" type="checkbox"/>
	-	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

performance of the Haydn.

The text field to the right of each check box is used for:

- Indicating the seat assignment for this work if it is different from the musician’s default seat

assignment. This feature is used only if your orchestra rotates seating within a concert. See the next section for more information on seat assignments.

- Indicating specific doubling or other instructions

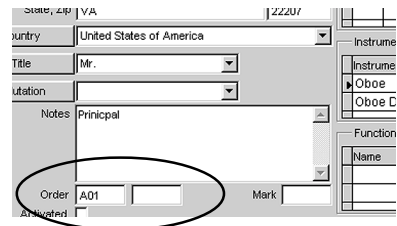
Musician Rank and Seating Order

OPAS offers a variety of methods to indicate the seat, chair, seniority or position of an orchestra member, whether that musician is a core member of the ensemble or a substitute.

While the OPAS data structure allows for complete flexibility in utilizing the fields that indicate a musician’s seating or chair, there is an inherent hierarchy built in to the structure. Therefore, while these fields can be utilized in any combination or manner that best suits the needs of your orchestra, it is recommended that this basic outline be followed.

Top Level - Master Artist Order / “Order 1”

Each Artist in the OPAS database has two Order fields that can be assigned. These fields are found on the Artist’s Main screen:



The left-hand field is referred to in OPAS as “Order 1”. This field indicates the primary seating or classification for the Artist, and can be thought of as the “Master” listing indication for the Artist. This is the default value used on other screens in OPAS (when assigning attendance or calculating payroll, for example) and is the default value used when printing reports.

Use this field to indicate the musician’s primary or default seating order in the ensemble.

OPAS will always re-start the ordering process with each new orchestra or ensemble Section, so numbers do not need to be sequential and should start over with each distinct section of the orchestra.

The Order 1 field can take any alphanumeric value up to five characters in length. It is recommended that when indicating the chair and stand for a musician, the following syntax be used:

C01

Where the letter is the Stand and the number is the Chair. In the example above, “C01” indicates the musician sits at the first chair of the 3rd stand. This is the recommended format because it is consistent and makes it easier to separate stands and chairs in reports and other documents.

If you wish to use numbers only, keep the following in mind. All order fields in the program will accept letters as well as numbers (referred to as “alphanumeric characters”). It is therefore necessary to “fool” the computer into sorting properly when the numbers being sorted are greater than 10. Take, for example, three artists: Smith (Order 1 = 2), Jones (Order 1 = 1) and Peterson (Order 1 = 11). You would expect these three artists to be listed as follows:

Jones (1)

Smith (2)

Peterson (11)

However, because the Order 1 field is alphanumeric, it reads the value of the field as letters and not as numbers. It will therefore sort alphabetically on the "letter" 1 and not the "number" 1, and OPAS will by default sort these artists as follows:

Jones (1)

Peterson (11)

Smith (2)

This can be effortlessly overcome by simply preceding all numbers less than ten with the number zero. This will cause the listing to be correct, whether the field is numeric only, or contains letters as well:

Jones (01)

Smith (02)

Peterson (11)

Again, this only pertains to sections or groups in which there are more than 10 Artists.

See page 442 for more information on ordering data in OPAS.

Optional Top Level - "Order 2"

The Order 2 field is used as an alternate sort field. Its use is dictated by your specific orchestra's needs, and is optional. Some examples for the Order 2 field might be:

- A musician who has a certain chair/stand assignment in the main orchestra, and a separate chair/stand assignment in a Pops or Chamber orchestra
- A musician who has a different chair/stand assignment for a secondary or doubling instrument

Second Level - Artist Order per Activity

When an Artist is assigned to an Activity in the Service Attendance area of OPAS, a new record is created for that Artist and Activity. This separate record permanently links the orchestra member to the activity and is used for both historical attendance and payroll purposes.

Artist	Matsuchi Kiwana	Replaced	
Instrument	Cello	Reason	
Position	Cello	Presence Type	Present
Group	Orchestra Member	Order	B02
Activity		Acc. category	1
Notes			
		Stand/Chair	B01

When this service record is created, OPAS automatically assigns the Order 1 (and Order 2 if there is one) value from the Artist's record. This means that the default seating order for each activity is the "Master" seating order for the ensemble.

To change the chair/stand location for any orchestra member for the activity, assign a chair/stand location for an orchestra substitute, or further define or clarify the location for any artist, use the Seat field on the Services Main screen:

This field is meant to supercede the Order fields only for the specified activity. The Seat field can contain up to 3 characters, and like the Order field, is alpha-numeric. It is primarily used on printed reports and searches. It can indicate, for example, that while a certain Artist usually sits on the First Stand, Second Chair (A02) of the bassoon section, the Artist will sit on the First Stand, First Chair (A01), only for the activity in question.

The Seat field can also be used to indicate inclusion in a secondary orchestra, an off-stage ensemble, an on-stage ensemble for a theatrical production, etc.

The Services area of OPAS is covered in Chapter 16 and 17

Third Level - Artist Order per Work per Activity

This third level is used only when the Artist's position in the ensemble changes for different works or compositions within a single activity.

As covered in the previous section of this chapter, when a musician is assigned to an activity, the Service Attendance grid provides the option of indicating the Artist's seat or location for each distinct work on the program:

Like the "Seat" field in the Service area, this field will supersede the Order fields only for the specified activity and composition. The field is primarily used for printed reports and searches. It can indicate, for example, that while a certain Artist usually sits on the First Stand, Second Chair (A02) of the bassoon section, the Artist will sit on the First Stand, First Chair (A01) for the performance of a specific work on the Activity in question.

01	11/17/01		Mendel		Haydn	Br
	CONC		HEBRI		SYMPH	Ci
	0.0					
	10	10		8		10
	0	0		0		0
	-	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
	-	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
	-	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
	-	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
	-	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

Like the Seat field in the Duty section, this value can also be used to indicate inclusion in a secondary orchestra, specific doubling information, an off-stage ensemble, an on-stage ensemble for a theatrical production, etc.



Remember that the text in this field is assigned to the specific work on the program and not for the entire activity itself.

This seating field can contain up to 5 characters, and like other order fields is alpha-numeric. The information in this field does not appear on other screens in OPAS, but can appear on reports and documents.

Using the Three Order and Seating Options

If the ensemble seating order is relatively static or fixed, assign the seating order using the Order 1 field on each Artists screen. This will make all subsequent search results, reports, etc. come out in "orchestra order"

If the ensemble seating order can change for individual activities, then use the Seat field in the Duty section to indicate the modification for a desired activity.

If the ensemble seating order can change or rotate within a single activity, then indicate that change in the Duty Management section when you assign the musician.

Printed reports in OPAS use the following logic when displaying seating orders. This logic is used only by default, and can be changed or customized to meet the special needs of an ensemble:

- 1 First check to see if the seating is indicated for a specific work in the Duties Management section. If so, then use that chair/stand assignment.
- 2 If a chair / stand assignment hasn't been specified for a specific work on the program, then check to see if it's been modified for the Activity as a whole. That is, check the Seat field on the Duty screen for this artist and activity. If there is information in the Seat field, then use that chair/stand assignment.
- 3 If the chair/stand assignment hasn't been specified for either a particular work within the activity, or changed for the entire activity itself, then use the default chair/stand assignment found in the Artist Order 1 field.

Service Attendance “Levels”

As with the Dates functions of OPAS, different planning Levels exist for personnel assignments.

Each Date level in OPAS (Level 1 (the default or plain “Dates” level, Level 2, Level 3, and Planning) has a corresponding Service Attendance Level.

The information in each of these Service Attendance areas comes exclusively from their corresponding Dates area. As in the Dates areas, the different Attendance levels are designed for long-range scheduling, confidential assignment of personnel, and “what if” scenarios.

Services ...
Service Attendance ...
Service Level 2 ...
Service Attendance Level 2 ...
Service Level 3 ...
Service Attendance Level 3 ...
Service Planning ...
Service Attendance Planning ...
Artists Accountings ...



All Service Attendance areas function in exactly the same way; the only difference between them is the activities that appear when the Refresh button is clicked.

Service Attendance Levels are re-set only by re-setting the originating Date Level. That is, to change a Service Attendance record from Level 3 to Level 2, the Date record with which the services are associated must be changed from level 2 to level 3. All assigned services will then be automatically changed.

See Chapter 3 for more information regarding Date Levels.

Chapter

16

Chapter 16 Musician Pay Rates and Payroll Functions

Overview

OPAS provides a wide variety of methods to store pay rate figures for artists and activities, and to calculate payroll. As the Payroll features of OPAS are an intrinsic component of general Expense functions, it is recommended that a basic understanding of OPAS expense features (Chapter 11) precede work in the payroll areas of the software.

Note that the payroll expenses covered in this chapter differ from other OPAS expenses in that payroll expenses are not automatically written to the OPAS Expenses area. Instead, payroll figures remain in the Services area of OPAS, and are moved to the Expenses area via deliberate payroll functions (described herein). Because payroll figures remain in the Services area until these payroll functions are deliberately applied, different adjustments, deductions and “what if” scenarios can be run before the payroll figures become a permanent part of the orchestra’s expenses.

It is also important to note that the calculation of orchestra payroll can vary widely between orchestras. The methods described in this manual are the default methods and functions used by OPAS. The software and its underlying database were specifically designed to accommodate changes or customizations to meet the particular needs of any orchestra.

Calculating Payroll in OPAS is fundamentally a three-step process:

- 1 Set up pay rates
- 2 Make adjustments to specific activities and/or artists
- 3 Calculate the pay due

Setting up Pay Rates

Overview

OPAS calculates payroll by starting with “Core” or Basic Amounts. To these core amounts, additions (“overages” such as doubling, overtime, broadcast fees, etc.) and deductions can be assigned to better reflect the musician’s participation in an activity.

For many orchestras, the core amount will be a per-service pay rate that is applied to each musician that participates in an activity. For other orchestras, the core amount is a salary figure that the musician receives, regardless of his or her participation in any activities.

OPAS allows the use of both methods.

Core or Basic Pay Methods and Amounts

Following is an overview of the different “core” or base pay rates. This is also the order in which they are discussed in this section of the manual

Salary

An explicit dollar amount assigned to a specific musician for a specific time period (week, month, or year). This amount has no relation to the musician’s participation (or lack thereof) in any orchestral activities or services that take place during that time period.

- Created and modified in the Artist Accountings area (Main Data | Services | Artists Accountings | Accountings Screen | General Accounting grid)
- Written to the Expenses area via the Accounting Function in the Artist Accountings section

Per-Service Pay

(1) Musician-Specific: An explicit dollar amount assigned to a specific musician for a specific activity. When the musician is assigned to the activity in question, the musician receives the pay amount.

- Created and modified in Artist Accountings area (Main Data | Services | Artists Accountings | Accountings Screen | Activity Accounting grid)
- Written to the Expenses area via the Payroll Calculation function in the Services section

(2) Activity-Specific: An explicit dollar amount assigned to a specific activity. When any musician is assigned to the activity in question, the musician receives the pay amount. There can be up to nine “categories” or classes of Activity-Specific pay, each of which is applied to the corresponding “category” or class of Musician. For example, an orchestra may have two different classes of musician, based upon seniority.

- Created and modified in Activities Background Data 1 | Activities | Main Screen
- Written to the Expenses area via the Payroll Calculation function in the Services area

Hierarchy of the three core or base Pay Methods

Salary Pay and Per-Service Pay are stored and calculated independently. Any musician can receive pay from either method, or from both methods. Adjustments to Per-Service Pay have no bearing on the amount of Salary pay (because by definition a salary is not dependent on participation in any activities). However, special functions can be created that modify Salary pay with per-service adjustments.

OPAS calculates Per-Service pay in the order in which it is presented above. That is, if a Musician has an individual pay rate for an activity (Musician-specific pay), OPAS uses that amount in place of any Activity-specific pay for that musician. For example:

Frank Smith is the concertmaster. For every Activity that is a “Concert”, Frank gets \$150. The basic pay assigned to an Activity that is a “Concert”, however, is \$100. So when any member of the orchestra is assigned to a concert, OPAS will first look to see if that musician has a specific pay rate for a “Concert”, if so, that amount will be used. If not, OPAS will use the

amount assigned to the Activity itself. In this way, for every Concert, Frank Smith's default pay will be \$150 and every other member of the orchestra will be assigned \$100.

Adjustments to Core or Basic Amounts

Salary adjustments

OPAS does not contain any built-in adjustments to Salary Pay. Salary pay is written to the Expenses table exactly as it is recorded in the General Expenses table. However, OPAS Functions can be written that adjust salary pay based upon a consistent and reliable set of conditions.

Per-Service Pay adjustments

Additional Service Pay. A single service or activity (such as a concert) actually "counts" as two or more services. An example could be a concert that is also a recording session (as opposed to a concert that has a recording "overage" assigned to it).

- Created/Modified in the Dates Accountings area. Main Data | Dates Accountings | Main Screen | Add.Activities grid (top grid)
- Written to the Expenses area: via the Payroll Calculation function in the Services area

When an additional activity is added to an existing one, that additional activity is visible in both the Dates Accounting area and the Dates area.

See illustration next page

Dates program area

Dates Accounting program area - the Additional Activity is assigned to the date record as above, and the appropriate per-musician cost is assigned

Adjustment or overage paid to all musicians. Any adjustment to the basic Per-Service pay that is awarded equally to all musicians assigned to the activity. The amount can be a positive or negative number, or a percentage. The adjustment will take into account the Musician's Presence Type and factor in any applicable adjustments based on that Presence Type. There can also be up to nine "categories" or classes of Adjustment pay, each of which is applied to the corresponding "category" or class of Musician. Examples of this adjustment are items such as Overtime or Broadcast overages that are given to all members of the orchestra.

- Created/Modified in the Dates Accountings area (Main Data | Dates Accountings | Main Screen | Performance Accountings grid (middle grid))
- Written to the Expenses area via the Payroll Calculation function in the Services area

Additional Fee paid to all Musicians. Any additional fee to the basic Per-Service pay that is awarded equally to all musicians assigned to the activity. The amount can be a positive or negative amount only. The key difference between this adjustment and one above is that this adjustment does *not* take into account the Musician's Presence Type - it is added "below the line". There can be up to nine "categories" or classes of Adjustment pay, each of which is applied to the corresponding "category" or class of Musician. Examples could be per-diem or travel pay awarded to each member of the orchestra.

- Created/Modified in the Dates Accountings area. Main Data | Dates Accountings | Main Screen | Date Amounts grid (bottom grid)
- Written to the Expenses area via the Payroll Calculation function in the Services area

Adjustment or Overage paid to selected Musicians. Any adjustment to the basic Per-Service pay that is applied only to a specific Musician(s). The adjustment can be a positive or negative dollar amount or percentage. The adjustment will take into account the Musician's Presence Type and factor in any applicable adjustments based on that Presence Type. There can also be up to nine "categories" or classes of Activity-Specific pay, each of which is applied to the corresponding "category" or class of Musician. Examples could be Doubling, Soloist Pay, Instrument cartage, and some Principal chair overages.

- Created/Modified in the Services area. Main Data | Services | Accountings/Arrangements screen | Pay Adjustments Grid (middle grid)
- Written to the Expenses area via the Payroll Calculation function in the Services area

Salary Pay

A musician's salary is created and modified in the Artists Accounting area of OPAS. The Artist Accounting area contains some of the same information as the Artist area, but is primarily used to create and store specific financial, service limit and leave information for musicians.

To open the Artist Accounting area, choose the Main Data | Services | Artist Accountings menu item.

The Artist Accounting area is divided into five sections or screens:

- **List** - shows a grid or List of all Artists that meet the criteria you choose
- **Main** - displays basic logistical information and service limits for a musician
- **Accountings** - displays salary and per-service pay rates for a musician
- **Absences** / Vacation - displays advance and long-term leave for a musician
- **Documents** - links to external digital files related a chosen artist

The Artist Accounting area opens in the "Basic Search" or "Green Screen" search mode. To learn more about this search mode, see Chapter 21. If the demonstration database is used, simply press the F9 key and answer Yes to the prompt to reveal all the Artists in this area

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area's contents. In Artist Accounting it displays the name, main instrument, Address Group and address details for each artist in the database.

The columns on the screen can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column. This List screen sorts by Last Name by default).

See Chapter 20 for more information on working with grids such as those on the List screen. The List screen will be used extensively to execute Searches and Filters. See Chapter 20 for more information on searches and filters.

To see the details of any one Artist, click the mouse once anywhere in that row then click the Main tab at the top of the window. Or simply double-click the mouse anywhere in the desired row.

Main screen

The Main screen in the Artist Accounting area contains basic Address Group, Instrument and Bank information as it was created in the Artist area of OPAS (see Chapter 4).

The bottom portion of the screen is a "Services" grid that is used to store the service limits or guidelines for this artist. Use of this grid is optional, and is used only if the orchestra needs to track and analyze services on a per-musician basis.

Setting service limits or guidelines is covered in Chapter 15. (Services for the orchestra as a whole are tracked in the Season are of OPAS - see page 453).

Accountings screen

The Accountings Screen is used to store Salary figures and Per-Service pay rates specific to this Artist:

The screen is divided into three grids. The top grid, "Accounting", is reserved for special or customized OPAS program functions, and should be left blank unless otherwise directed.

The middle grid, "General Accountings", is used to store salary information for the musician (see the next section of this manual for information regarding the bottom grid). Salary amounts can be assigned to staff musicians and/or substitutes. To create a new salary figure, click the green "+" button at the top right of the grid. On the resulting window, fill in the appropriate fields to create a new salary record for the artist:

The screenshot shows a software window titled "Artists/General Accounting [10/01/2001]". The window has a "List" tab and a "Main" tab. The "Main" tab is active and contains the following fields:

- Valid from:** 10/01/2001 (with a calendar icon) and Mo (with a dropdown arrow)
- Valid thru:** 09/30/2002 (with a calendar icon) and Mo (with a dropdown arrow)
- Amount:** \$ 215.00 (with a currency icon and a dropdown arrow)
- Expense Type:** Personnel: Core Player Salary (with a dropdown arrow)
- Period:** weekly (with a dropdown arrow)
- Day:** Mo (with a dropdown arrow)
- Notes:** In addition to per-service pay

Valid From / Thru dates - these dates define the start and end of the overall time period covered by this pay rate. This can be a season, calendar year, or any other date range as called for by your personnel contract or procedures. Pay periods can be set in the future, and can overlap.

Amount - the amount the musician is paid for each pay period

Expense Type - the expense type associated with the musician's salary. See Chapter 11 for more information on Expense Types

Period - the specific pay period and the start unit for the period. A pay period can be Yearly (in which case, the month that starts the year is specified), Monthly (in which case the day that starts the month is specified) or Weekly (in which case the weekday that starts the work week is specified) or Daily.

Notes -any optional descriptive text regarding this pay rate

Note that this structure provides for a comprehensive pay history and future pay analysis for each musician.

A musician's salary is calculated and written to the Expenses area of OPAS based on the parameters on this screen. To calculate and store the salary information, click the function icon in the upper left hand corner screen shot and choose the "Create General Accountings" function. OPAS will then calculate each distinct pay period between the "From" and "Thru" dates, and store the Amount in the Expenses area.



Absences / Vacation screen

This screen is used to store advance or extended leave for the musician. See page 226 of Chapter 15 for more information.

Documents screen

The Documents screen is used to link external digital files to a particular activity in the OPAS database. See chapter 19 for more information regarding the use of the Documents screen.

**Per-Service Pay
(Musician-specific)**

In the Artist Accounting area of OPAS, at the bottom of the Accountings screen, is a grid titled "Activity Accounting" (see the previous section of this manual for more information on the Artist Accounting area). This grid is used to store the pay amounts that the musician receives for a particular activity or event. Whenever the musician is assigned to the event (using the methods described in Chapter 15), OPAS also assigns the pay rate.

Activity Accounting [3]				
Valid from	Activity	Amount	Percent	Notes
10/01/2001	Recording	\$ 265.00	0.00	
10/01/2001	Concert	\$ 225.00	0.00	
▶ 10/01/2000	Concert	\$ 218.00	0.00	

For the time period beginning October 1, 2001, this artist receives \$225 for each concert, and \$265 for each recording to which she is assigned. If the artist is assigned to any other activity (such as a rehearsal or run-out) then she receives the same amount as other musicians. This amount is stored with the activity itself and is covered in the next section.

To create a new Per-Service Pay amount, click the green "+" key at the top right of the grid. On the resulting window, fill in the appropriate fields to create a new per-service pay record for the artist.

Valid From / Thru dates - these dates define the start and end of the overall time period covered by this pay rate. This can be a season, calendar year, or any other date range as called for by your personnel contract or procedures. Pay periods can be set in the future, and can overlap.

Activity - the specific activity to which this pay rate applies (see page 419 for more information about creating activities)

Amount - the amount the musician is paid for each participation in the activity

Percent - used only if the amount the musician is to receive is a percentage of another figure in OPAS, and not a dollar amount. Functions that employ this percentage figure must be specially created, so do not use this field unless directed to do so.

Notes -any optional descriptive text regarding this pay rate

Note that this structure provides for a comprehensive pay history and future pay analysis for each musician.

The "Calculating Payroll" section of this document describes how OPAS uses the information on this screen.

Per-Service Pay (Activity-specific)

This type of per-service pay rate is applied to all musicians assigned to the activity in question. The pay-rate is actually associated with the activity; once a musician is assigned to the activity, he/she inherits the pay rate.

Activity-specific pay rates are created and stored in the Activities area of OPAS - see page 419 for more information on this screen and its components:

Group	Performance		
Name	Concert		
Name 2			
Code	CON	Abbreviation	Con.
Default Start	00:00PM	Default End	10:00PM
		Svcs.	0.0
Performance	<input checked="" type="checkbox"/>	Svcs.	<input checked="" type="checkbox"/>
		Write to Text	<input type="checkbox"/>
Expense Type	Personnel: Core Player Fee		
Amount	Principal Chair Overage		Account No.
Notes			
Dates	<input checked="" type="checkbox"/>	Add. Activities	<input checked="" type="checkbox"/>
Scheduling	<input checked="" type="checkbox"/>		
Tours	<input checked="" type="checkbox"/>		

The pay rate for the activity is stored in the middle of the screen. The **Expense Type** associated with the musician's salary is indicated in the drop-down field. If the expense type is associated with a fixed amount, that amount can be chosen from the drop-down field as well. See chapter 11 for more information on Expense Types and fixed Amounts.



Note: Remember to assign the appropriate amount to all performance-related activities such as run-outs, rehearsals, etc. If this activity factors into the orchestra payroll remember as well to check the "Svcs" (Services) box so that the activity will appear in all OPAS service program areas.

The "Calculating Payroll" section of this document describes how OPAS uses the information on this screen.

Pay Adjustments, Overages and Discounts

Individual factors that can influence the total amount of pay due to a musician are added to any of the base pay amounts covered in the earlier sections of this document (Salary, Per-Service Pay assigned to a Musician, or Per-Service Pay assigned to an Activity).

These factors or items exist independently of the other payroll figures, and are added when circumstances dictate. They can either be a fixed dollar amount, or a percentage. Such items can include, for example:

- Overtime
- Doubling
- Broadcast overages
- Cartage
- Solo or prominent part overages
- Principal chair or move-up pay

Each of these is specific to one or more musicians in the ensemble, and tends to apply to only one activity at a time (or to all activities in a Project). They are therefore often thought of as individual line items that are added to, or subtracted from, one of the base pay amounts.

Each of these items or amounts is a distinct Expense Type, and can have a related fixed Amount associated with it. See Chapter 11 for more information and details regarding Expense Types.

Calculating Payroll

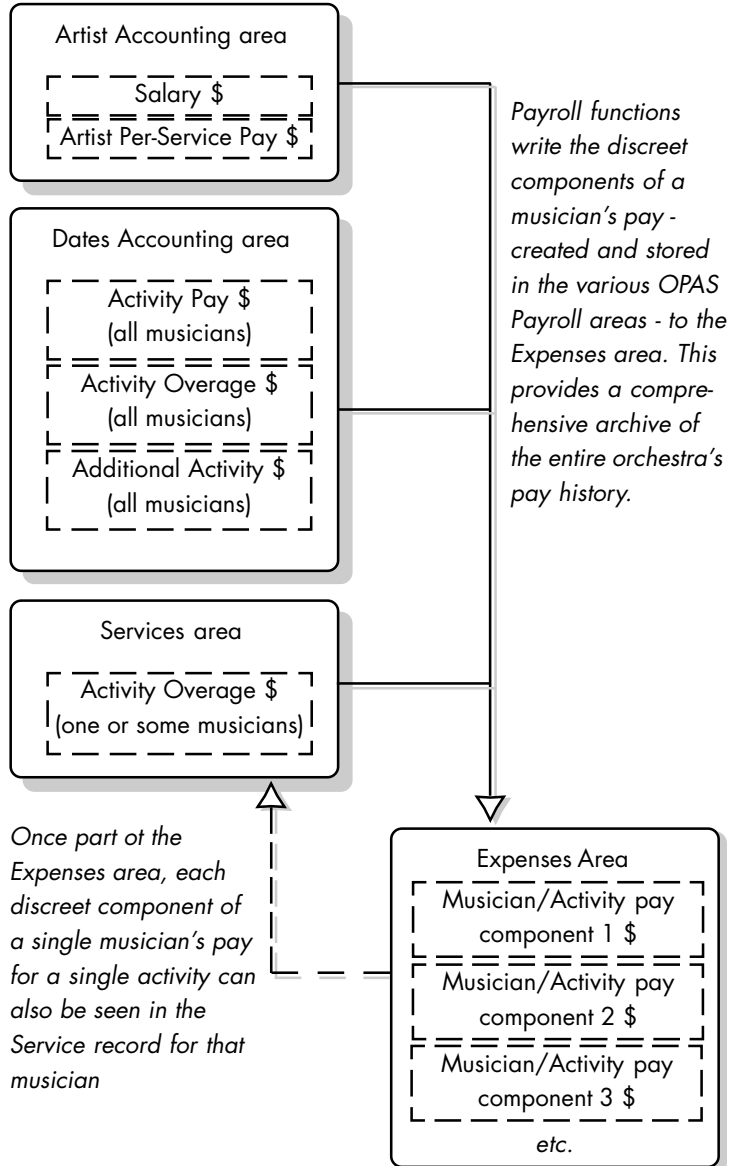
The Payroll calculation functions in OPAS bring together several different areas of the software in a logical fashion. It bears repeating that the methods and procedures outlined herein are merely the default methods programmed into the OPAS software functions. It is possible to customize these procedures to match the particular needs and protocol of an orchestra.

The general payroll calculation formula is as follows:

- 1** A musician is assigned to an activity in the Service Attendance area of the software (see Chapter 15)
- 2** The base pay for that musician is figured, using the figures above, and the procedure outlined below
- 3** Any additions (overages) or deductions due to the entire orchestra are taken into account
- 4** Any additions (overages) or deductions due to just the selected musician are taken into account
- 5** Each of these discreet elements is written to the Expenses are of OPAS

This method allows for not only the calculation of an entire orchestra payroll for any activity or time period, but also the analysis of payroll components. Because OPAS keeps these components distinct

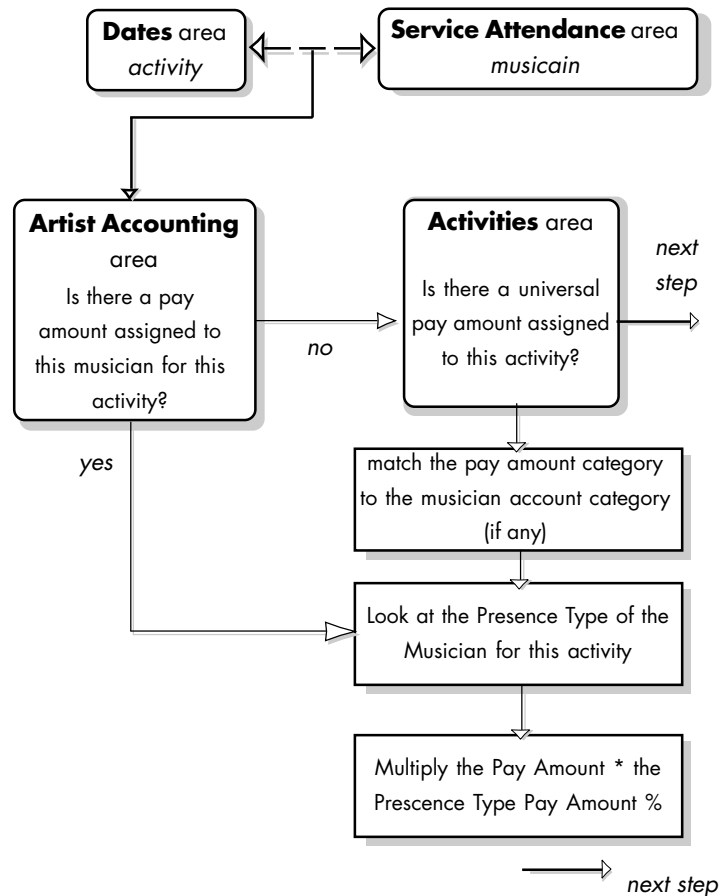
in the Expenses area, it is possible to quickly see how much was paid out in overtime for any activity or time period (to give but one example).



The next section of this manual will explain the payroll process using diagrams and narrative. Following that, the two program areas of OPAS - the Dates Accounting area and the Services area - will be covered in detail, and screen shots will demonstrate how these payroll elements are entered and stored on the various screens in those program areas.

Step one - Calculate the Base Amount

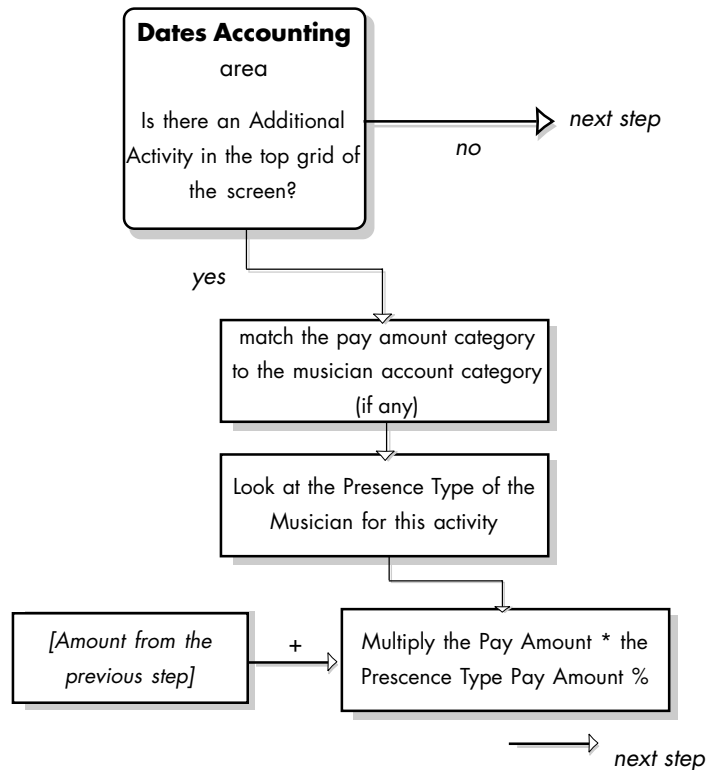
OPAS starts with a musician (an orchestra member or a substitute) assigned to an activity. The base pay is calculated following these steps:



Any Per-Service pay assigned to the individual musician him/herself takes precedence. If there is no such Per-Service pay, then OPAS looks to see if there is a Per-Service pay rate associated with Activity. If so, it uses that Activity amount. OPAS then checks the Presence Type of the musician, and multiplies the amount by the "Pay Amount %" of that Presence Type (see page 225 - this Pay Amount % is most often 0%, 50% or 100%).

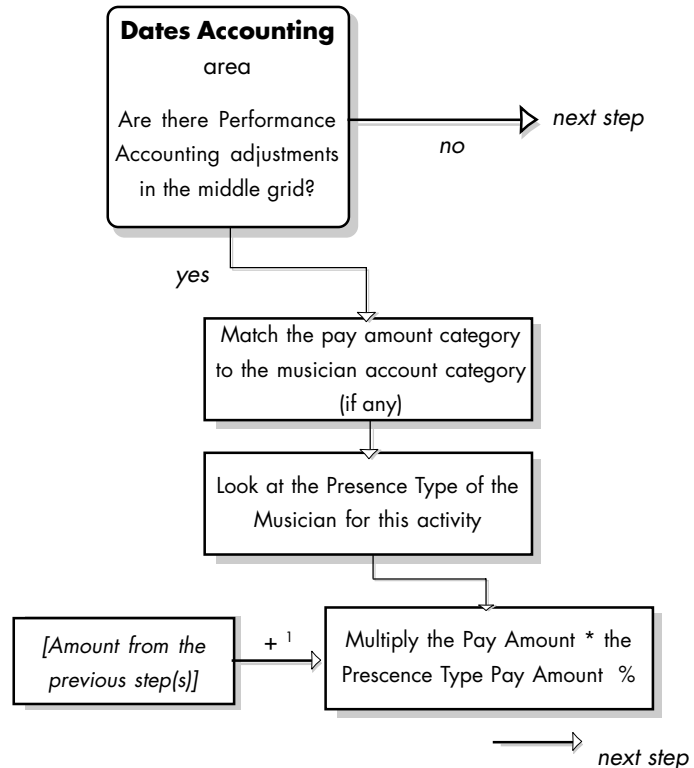
Step two - Factor in any Additional Activities

OPAS next checks for any "Additional Service Pay" to be calculated (see page 256 above). This will only exist in cases where a single occurrence on a stage is counted as two or more services (such as a performance that is equally considered both a concert and a recording session).



Step three - Factor adjustments paid to the entire orchestra

OPAS next checks for adjustments that are applied to all members of the orchestra. These can be items such as overtime, broadcast fees, etc. They are individual Expense Types.

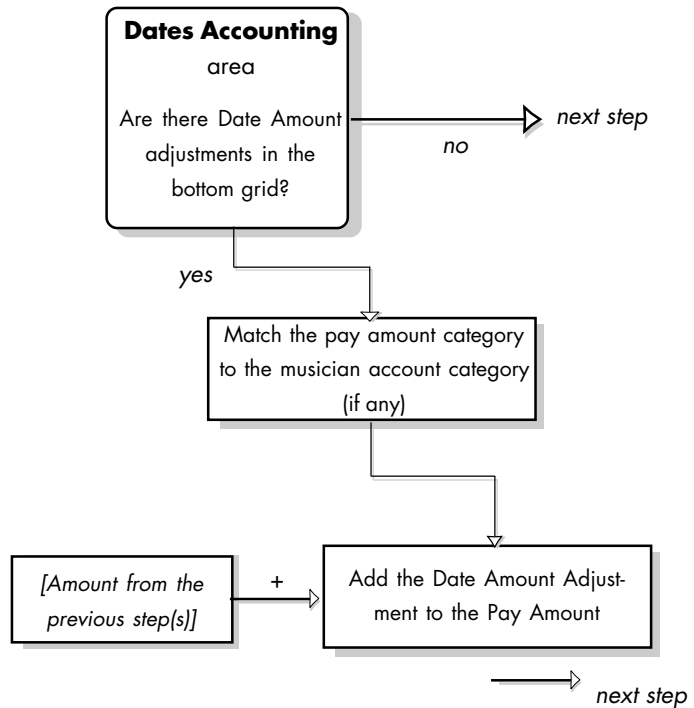


¹ if this adjustment is represented as a percentage (5% overscale) instead of a flat amount (\$35 overtime pay), then the adjustment is multiplied by the amount from the previous step, not added to it.

It is important to note that these adjustments and overages take the musician's Presence Type into account - just as with the base pay in Step one, OPAS will factor the "Pay Amount %" of the Presence Type into these overages.

Step four - Factor additional fees paid to the entire orchestra

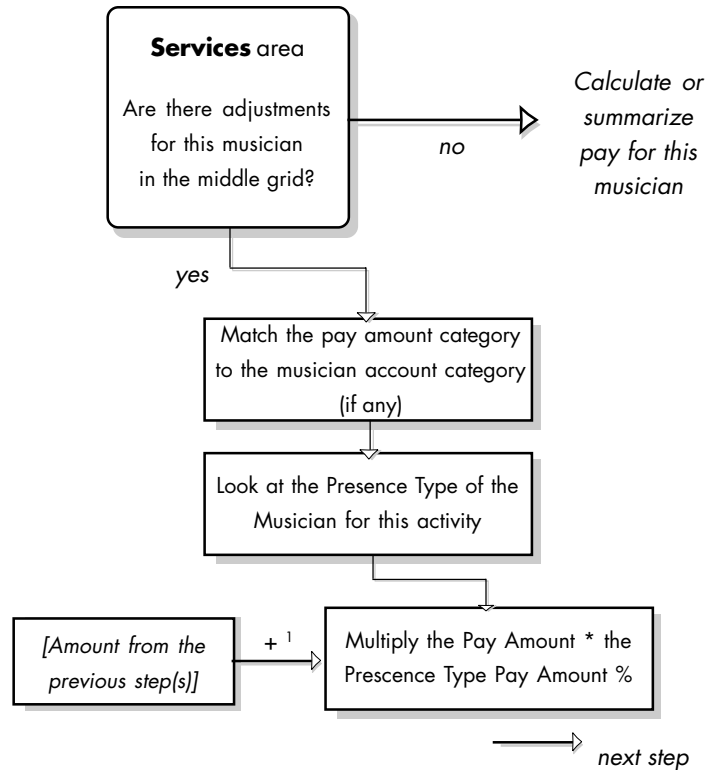
OPAS next looks for fees or adjustments that do not take the musician's Presence Type into account. These are also amounts or overages paid equally to all members of the orchestra, but they are "flat fees", not percentages, and not subject to any other influences. These are often travel or meal allowances that have no connection to the repertoire.



Again, the only difference between these adjustments and those applied in Step three is that these adjustments are flat amounts (not percentages) and they are independent of the musician's Presence Type.

Step five - Factor adjustments paid only to the selected musician(s)

Finally, OPAS checks any adjustments or overages that are paid only to the musician in question (or a set of selected musicians). These are adjustments such as doubling, move-up pay, solo pay, cartage, and the like.



¹ if this adjustment is represented as a percentage (10% principal chair premium) instead of a flat amount (\$200 soloist/prominent part pay), then the adjustment is multiplied by the amount from the previous step, not added to it.

Producing Payroll Totals

OPAS provides the means to examine payroll totals without writing the totals to the Expenses area. This enables analysis of any section, artist, time period or component of the payroll. It also allows for an infinite number of payroll re-calculations and “what if” scenarios.

This examination is done via the “Payroll Calculation” report, run from the Services area of OPAS. The specific procedures for producing this report and a sample of the report are covered in the Services area of this document - see page 299.

Once the payroll is final, it is written to the Expenses area of OPAS via the “Payroll Calculation” function. This procedure follows the same methods as does the report, and writes the individual components of the total payroll.

Dates Accounting program area

Overview

The Dates Accounting area of OPAS is used to create adjustments to orchestra payroll that apply equally to all members of the orchestra. As the name implies, adjustments are made to the activity (or “Date”) itself - orchestra personnel who are then assigned to the activity inherit the adjustments.

Information in the Dates Accounting area is used in steps one through four of payroll calculation.

To open the Dates Accounting area of OPAS, choose the Main Data | Dates Accounting menu item.

The Dates Accounting area is divided into three sections or screens:

- **List** - shows a grid or list of all activities that meet select criteria
- **Main** - displays financial information a selected activity
- **Documents** - links to external digital files related a chosen activity

The OPAS Dates Accounting area opens in the “Basic Search” or “Green Screen” search mode. To learn more about this search mode, see Chapter 20. If the demonstration database is used, simply press the F9 key (and answer Yes to the prompt) to reveal all the Activity records in this area. The records in this area will be identical to those in the Dates area of OPAS (see Chapter 3), but the data stored in this area of the software is restricted to payroll financial information.

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area’s contents. In Dates Accounting it displays the basic logistical (date/time/place/Project/Season) and artistic (Conductor) data for each distinct activity.

The columns on the screen can be:

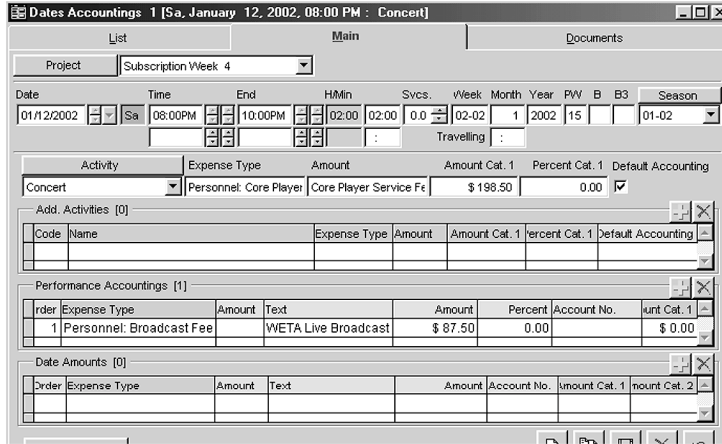
- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column). This List screen sorts by Date by default.

See Chapter 20 for more information on working with grids such as the list tab. The List screen is used extensively to execute Searches and Filters. See Chapter 20 for more information on searches and filters.

To see the financial details of any one activity, click the mouse once anywhere in that row, then click the Main tab at the top of the window. Or simply double-click the mouse anywhere in the desired row.

Main screen

This screen stores the financial aspects of this activity as they pertain to orchestra payroll. It also allows for the inclusion of payroll adjustments.



The top portion of this screen contains fields that are identical to that in the Dates area (see Chapter 3) and outlines the Project, date, time and service information for this activity.

The Dates Accounting area contains three additional time fields. Use of these fields is optional; they can be incorporated in reports or printed documents, and can be used in other program functions. The two fields under the start and end times can be used for “Call Times” or alternate start and end times. For example, an orchestra activity may be 1.75 hours long, but by contract must be represented in two-hour blocks. An alternate start or end time can be entered here to account for that. The “Travelling” field indicates how much time for this activity is attributed to travel.

The middle row, beginning with the “Activity” drop-down field, indicates any Per-Service pay associated with this Activity. For orchestras that pay on a per-service basis, this is the default amount assigned to each musician - see page 255 of this chapter for more information. If the Expense Type and Amount fields are empty then this activity does not have a pay rate associated with it. Note that

the fields are in yellow indicating that they are fixed and read in from other sections-they cannot be edited or deleted. (Note - unless otherwise instructed, leave the "Default Accounting" box checked).

The bottom half of the screen is divided into three grids, each of which plays a different role in the payroll calculation steps that are outlined on page 266.

Additional Activities grid

This grid is used to indicate that the activity in question is, for payroll purposes, counted as two or more distinct activities. This could be used, for example, if a performance is counted as both a Concert and a Recording session. The information in this grid is used in Step 2 of payroll calculations-see page 269 above.

To add an activity, click the green '+' icon at the top right of the grid, and a list of all OPAS activities will be displayed. If the activity that is added has a pay rate associated with it, that pay rate will be displayed in the grid.

Additional Activities can also be added in the Dates area of OPAS.

Performance Accountings grid

This grid is used the most of the three on this screen, and stores adjustments or overages that are applied to any and all musicians assigned to this activity - adjustments such as overtime, broadcast fees, recording overages, etc. The information in this grid is used in Step 3 of the payroll calculations - see page 270 above.

Order	Expense Type	Amount	Text	Amount	Percent	Account No.	Unit Cat. 1
1	Personnel: Broadcast Fee		WETA Live Broadcast	\$ 87.50	0.00		\$ 0.00

To assign an adjustment, click the green '+' icon at the top right of the grid. This will open a list of all Expense Types. Select the desired adjustment and add it to the grid (click the large right-pointing

arrow). The default values associated with the selected Expense Type will be transferred to the grid, but many of these values can be over-written. A column heading in green indicates that the contents of the column can be modified or edited to better suit the particular performance.

Order - the order in which the adjustments appear in the grid and on reports and documents

Amount - if the Expense Type is linked to a fixed Amount, that Amount can be changed or deleted. See Chapter 11 for more information on fixed Amounts

Text - any descriptive text, for example the reason for the overage

Account No. - a General Ledger or internal account number

Amount - a new, temporary amount for the adjustment

Percent - a new, temporary percentage for the adjustment

When calculating the adjustment, OPAS will look first to see if any temporary amounts or percentages have been put into either of the "green" columns. If so, then OPAS uses those figures. If not, then OPAS uses the default value of the Expense Type.

OPAS takes a musician's Presence Type into account when calculating adjustments in this grid. The default adjustment calculation procedure is as follows.

NOTE: this is only the default procedure and is more closely associated with orchestras that pay on a per-service basis. Functions can be written to modify this procedure for salary-based orchestras

1 OPAS starts with the amount associated with the Activity. In this example, \$198.50

Activity	Expense Type	Amount	Amount Cat. 1
Concert	Personnel, Core Player	Core Player Service Fe	\$ 198.50

In this example, each musician will receive an additional \$87.50.

Date Amounts grid

The bottom grid, "Date Amounts" provides much the same function as the Performance Accountings grid, but with these two key differences:

Adjustments to pay entered in this grid do not take into account the Presence Type of musicians assigned to the Activity

Adjustments to pay entered in this grid are dollar amounts only, not percentages

Adjustments in this grid are applied equally to all musicians assigned to the activity, and the information in this grid is used in Step four of the payroll calculations - see page 271 above. As these amounts are added as whole numbers with no regard to the musician's presence type, they are ideal for fixed amounts such as per-diem or travel allowances.

To assign an adjustment, click the green "+" icon at the top right of the grid. This will open a list of all Expense Types. Select the desired adjustment and add it to the grid (click the large right-pointing arrow). The default values associated with the selected Expense Type will be transferred to the grid, but many of these values can be overwritten. A column heading in green indicates that the contents of the column can be modified or edited to better suit the particular performance.

Order - the order in which the adjustments appear in the grid and on reports and documents

Amount - if the Expense Type is linked to a fixed Amount, that Amount can be changed or deleted. See Chapter 11 for more information on fixed Amounts

Text - any descriptive text, for example the reason for the overage

Account No. - a General Ledger or internal account number

Amount - a new, temporary amount for the adjustment

When calculating the adjustment, OPAS will look first to see if a temporary amount has been entered in the “green” column. If so, then OPAS uses that figure. If not, then OPAS uses the default values for the Expense Type.

Pay Calculation in the Dates Accounting area

The default pay adjustment calculation for data stored in the Dates Accounting program area follows here. This procedure will be equally applied to all musicians assigned to the activity. For musician-specific adjustments, refer to the Services program area and section of this manual.

NOTE: this is only the default procedure and is more closely associated with orchestras that pay on a per-service basis. Functions can be written to modify this procedure for salary-based orchestras

- 1 OPAS starts with the amount associated with the Activity (circled below).

The screenshot shows the 'Dates Accountings' window for a concert on January 12, 2002. The 'Project' is 'Subscription Week 4'. The table below shows the activity and expense details:

Date	Time	End	HMin	Svcs.	Week	Month	Year	PW	B	B3	Season
01/12/2002	Sa	08:00PM	10:00PM	02:00	02:00	0.0	02-02	1	2002	15	01-02

Activity	Expense Type	Amount	Amount Cat. 1	Percent Cat. 1	Default Accounting
Concert	Personnel: Core Player	Core Player Service	\$ 198.50	0.00	<input checked="" type="checkbox"/>

Name	Expense Type	Amount	Amount Cat. 1	Percent Cat. 1	Default Accounting

Expense Type	Amount	Text	Amount	Percent	Account No.	Amount Cat. 1	Amount Cat. 2
Personnel: Broadcast Fee		WETA Live Broadcast	\$ 87.50	0.00			\$ 0.00

Expense Type	Amount	Text	Amount	Account No.	Amount Cat. 1	Amount Cat. 2

- 2 OPAS then allocates this amount to each musician assigned to the activity, taking into account the Presence Type of each

musician, and the "Pay Amount %" of that Presence Type. OPAS also takes into account, if necessary, the Account Category of the musician.

- 3 OPAS then looks at any Additional Activities (top grid) and factors in the amount assigned
- 4 OPAS then looks at any Expense Type in the Performance Accountings (middle) grid. It checks to see if temporary values have been entered in the green amount or percentage column. If so, it uses that amount and if not, the amount associated with the Expense Type itself, taking into account the Presence Type of each musician, and the "Pay Amount %" of that Presence Type. OPAS also takes into account, if necessary, the Account Category of the musician.
- 5 OPAS then looks at any Expense Type in the Date Accountings grid. It checks to see if temporary values have been entered in the green amount column. If so, it uses that amount and if not, the amount associated with the Expense Type itself. The adjustment is allocated equally to each musician assigned to the activity.

Using the example above, any musician who is "Present" at this activity (the concert on January 12, 2002) would have base pay calculated as follows:

$$\begin{aligned}
 &(\text{Activity pay} * \text{Presence Type}) + \\
 &(\text{Additional Activity pay} * \text{Presence Type}) + \\
 &(\text{Performance Accounting adjustment} * \text{Presence Type}) + \\
 &(\text{Date Amount})
 \end{aligned}$$

$$\begin{aligned}
 &(\$198.50 * 100\%) + \\
 &(\$ 0 * 100\%) + \\
 &(\$ 87.50 * 100\%) + \\
 &(\$ 0) = \$286
 \end{aligned}$$

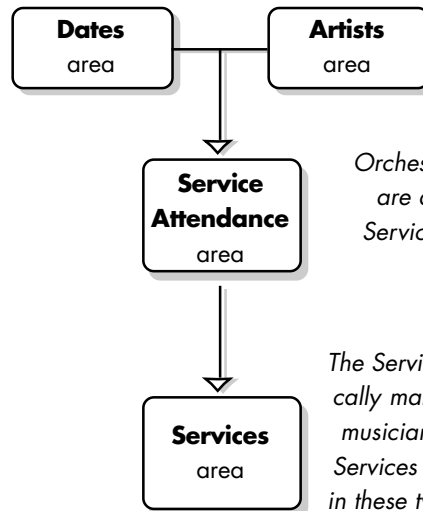
Documents screen

The Documents screen is used to link external digital files to a particular activity in the OPAS database. See chapter 19 for more information.

Services Program Area

Overview

The Services area of OPAS contains a unique record of each musician's participation in each activity. When a musician is assigned to an activity in the Service Attendance area of OPAS, that assignment is also written to the Services area of the software. In the Services area changes can be made to better reflect the musician's specific participation in the event, and adjustments to the musician's pay for that event can be made. Each assignment for each musician is stored in this program area, giving you a complete performance history for every member of the orchestra, and every substitute.



Orchestra musicians and substitutes are assigned to activities in the Service Attendance area of OPAS (Chapter 15)

The Service Attendance area automatically makes a duplicate record of the musician's participation in the OPAS Services area. Once written, the data in these two sections becomes dynamically linked - changes in one are reflected in the other

Note that it is possible to assign musicians to activities directly in the Services area of OPAS (and bypass the Services Management area). However, this method is slower and more prone to error for all but the most experienced OPAS users, and not recommended. It is recommended that musician (both core players and substitutes) be assigned to activities in the Services Management area, and then modifications to the assignments be made in the Services area.

To open the Services area of OPAS, choose the Main Data | Services | Services menu item.

The Services area is divided into three sections or screens:

- List - shows a grid or list of all musicians services that meet the criteria you choose
- Main - displays financial and logistical information for a selected service
- Accounting / Arrangements - displays financial information for the selected musician and service

The Services area opens in the “Basic Search” or “Green Screen” search mode. To learn more about this search mode, see Chapter 21. If the demonstration database is being used, simply press the F9 key and answer yes to the prompt to reveal all musician service records.

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area’s contents. In Services it displays the unique combination of assigned orchestra personnel and an activity. The columns on the List screen contain the basic logistical data (date/time/place/Project/Season) for each activity, and the name, section, instrument and seating order for each musician.

The columns on the screen can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column). This List screen sorts by Date by default.

See Chapter 20 for more information on working with grids such as the list tab. The List is extensively used to execute Searches and Filters. See Chapter 20 for more information on searches and filters.

To see the details of any one musician's service assignment, click the mouse once anywhere in that row, then click the Main tab at the top of the window. Or simply double-click the mouse anywhere in the desired row.

Main screen

This screen stores all the logistical information about a single musician's participation in a single activity. The musician will already have been assigned to the activity in the Service Attendance area of OPAS (see Chapter 15), and this screen is used to modify logistical attributes of that assignment.

FILTER: Services 1 [01/11/2002: Bosnelli, Tricia]

List Main Accounting/Arrangements

Project: Subscription Week 4 Activity: Rehearsal

Date	Time	End	HMin	Svcs.	Week	Month	Year	PW	B	B3
01/11/2002	Fr	07:30 PM	10:00 PM	02:30	02:30	0.0	02-02	1	2002	15

Artist: Bosnelli Tricia Replaced: Crawford Louis

Instrument: Cello Reason: Illness

Section: Cello

Address Group: Orchestra Substitute Presence Type: Present

Function:

Order: Acc. category: 1 Stand/Chair: D02

Notes: Louis Crawford took ill the night of Jan. 10; Tricia filled in for the remaining rehearsals & concerts

Many of the fields on this screen are tinted in yellow, indicating that they are either key fields that were set when the musician was assigned in the Service Attendance area and cannot be modified.

The top portion of the screen is identical to that in the Dates area, and contains all the logistical data for activity itself. These fields are described in detail in Chapter 3.

The lower two-thirds of the screen describes the musician's participation in the activity.

Name - the name of the musician

Instrument / Section - the instrument the musician performs for the activity, and the section to which the instrument belongs. Note that the section was fixed when the musician was assigned in the Service Attendance area of OPAS and cannot be changed. However, the specific instrument can be. For example, a member of the Flute section may play Piccolo for a given activity. (NOTE: see page 240 for information on indicating a change of instruments or doublings between distinct works on a program)

Address Group - this drop-down list will contain a list of all Address Groups to which the musician belongs. The "main" Address Group will appear by default, but can be changed. In this way, personnel who are members of both the main and a chamber orchestra, or who are both core personnel and substitutes, can have their participation in this particular activity better defined. For more information on Address Groups, see page 423.

Function - the Function field is used to further classify musicians on a permanent basis. This indication is seldom used in U.S. orchestra systems.

Replaced / Reason - if this Service record is for a Substitute, these two fields can indicate the core musician this substitute replaces, and the reason for the substitution. To create a list of reasons, click the field label "Reasons" to open

Presence Type - this field is one of those created when the

musician is assigned in the Service Attendance area. It can be changed to indicate a change in the musician's participation. For example, a musician may have been assigned "Present" for a particular rehearsal, but the musician had to take Emergency Leave, or called in Sick. This change of Presence Type can be made and saved on this screen.

Note that the Service Attendance area and the Services area are interrelated. Changes - such as that to Presence Type - made in the Services area will be reflected in the Service Attendance area and vice-versa

The **Order** fields indicate the default Stand/Chair seating assignment for the musician. If the musician is to move to a different Stand/Chair for the specific activity reflected in the Service record, the new location can be recorded in the Stand/Chair field. The **Stand/Chair** field can also be used for substitute musicians who do not have a permanent assigned seat. See page 243 for a discussion of seating, rotation and stand/chair order.

Acc. Category - this field represents the musician's account category, and enables the accounting category to be changed just for this activity. See page 416 for more information regarding account categories.

Notes - any descriptive text or notes regarding this musician's participation in the activity.

Accounting / Arrangements screen

Overview

This screen stores all the financial information about a single musician's participation in a single activity. It is used to reflect pay adjustments for this specific musician and this specific activity, and stores the total amount paid to the musician for the activity.

The Accounting/Arrangements screen is divided into three grids:

Expenses grid

The Expenses grid provides a financial summary of the service. It

stores each component of the musician’s pay for the activity (base salary and all adjustments), the amount of each, and the total the musician was paid for the activity.

The items in this grid are not manually entered, but are automatically written when the Payroll Calculation function is run, and the musician’s pay is written to the OPAS Expenses area. See chapter 17, Payroll Totals, for more information regarding this process.

Pay Adjustments grid

This grid is used to add and store adjustments to the pay for this particular musician and activity. These are adjustments restricted to a single musician or set of musicians, and not the entire orchestra. For example, Doubling, Solo fees, “move-up” pay, instrument cartage, etc. Information in this grid is used in Step five of the payroll calculations - see page 272 above.

Order	Expense Type	Amount	Text	Account No.	Amount	Percent
1	Personnel: Move-Up F		Replaced B. Stadleman		\$ 0.00	5.00

To assign an adjustment, click the green ‘+’ icon at the top right of the grid. This will open a list of all Expense Types. Select the desired adjustment and add it to the grid (click the large right-pointing arrow). The default values associated with the selected Expense Type will be transferred to the grid, but many of these values can be overwritten. A column heading in green indicates that the contents of the column can be modified or edited to better suit the particular performance.

Order - the order in which the adjustments appear in the grid and on reports and documents

Amount - if the Expense Type is linked to a fixed Amount, that Amount can be changed or deleted. See Chapter 11 for more information on fixed Amounts

Text - any descriptive text, for example the reason for the overage

Account No. - a General Ledger or internal account number

Amount - a new, temporary amount for the adjustment

Percent - a new, temporary percentage for the adjustment

When calculating the adjustment, OPAS will look first to see if any temporary amounts or percentages have been put into either of the "green" columns. If so, then OPAS uses those figures. If not, then OPAS uses the default value of the Expense Type.

In the example screen on the previous page, "Move-Up Pay" does not have a fixed amount or percentage assigned to it (the far two right columns are empty), so OPAS will use the Percentage in the green "Percent" column (5%).

OPAS takes a musician's Presence Type into account when calculating adjustments in this grid.

Pay Calculation in the Services area

The default pay adjustment calculation for data stored in the Services area follows here. This procedure is applied only to the specified musician. For adjustments that apply to the entire orchestra, refer to the Dates Accounting program area and section of this manual.

NOTE: this is only the default procedure and is more closely associated with orchestras that pay on a per-service basis. Functions can be written to modify this procedure for salary-based orchestras

- 1 OPAS starts with the amount associated with the Activity.

Activity	Expense Type	Amount	Amount Cat. 1
Concert	Personnel: Core Player	Core Player Service Fe	\$ 198.50

- 2 OPAS then allocates this amount to the musician, taking into account the Presence Type of the musician, and the "Amount %" of that Presence Type.

In this example, a musician who is "Present" will receive 100% of the assigned pay (either the musician's specific pay (assigned in the Artist Accountings area) or the activity pay (assigned in the Dates Accounting area)).

- 3 OPAS then looks at any Expense Types in the Pay Adjustments grid for this musician. It checks to see if temporary values have been entered in either the green Amount or Percent columns. If so, it uses those amounts and if not, the amounts associated with the Expense Type itself.

Using the example above, this musician - Peter Fishman - "Present" at the activity (the concert on March 2, 2002) will have base pay calculated as follows:

$$\begin{aligned}
 & (\text{Activity pay} * \text{Presence Type}) + \\
 & (\text{Accounting adjustment} * \text{Presence Type}) \\
 \hline
 & (\$198 * 100\%) + \\
 & ((\$198 * 5\%) * 100\%) = \$208.43
 \end{aligned}$$

The Arrangements field at the bottom of the screen is used to record any special arrangements that are identified with this service, such as travel, program credits, etc. Information in this field can become part of printed reports and documents.

Payroll Notes and Functions

Applying multiple pay adjustments

Any or all of the payroll adjustments covered in this chapter can be applied - in any combination - to a musician's pay. When there is more than one adjustment, OPAS applies them by default in the order specified on page 267. However, this order can be modified or customized through the use of special functions. In addition, payroll adjustments can be made on a musician's salary instead of a per-service pay amount, again through the simple use of OPAS program functions.

Assigning adjustments to groups of musicians

Pay rate adjustments that pertain to a group of musicians, but not necessarily the entire orchestra, can be added in the Services area of OPAS.

In the Services area, run a filter or search to produce the desired group of musicians, and the desired activity or activities. See Chapter 21 for more information on searches and filters.

With the musicians and activities showing on the Services List screen, click the Function icon in the upper left-hand corner of the screen.



This will open the Select Function window. Choose the "Add Accounting Items" function, and click the Start Function button. This action will open a sub-window with a list of all Expense Types in the database. Select the desired pay adjustment, and type the desired Amount or Percentage in the appropriate column. Then click the large right-pointing arrow to add the Expense Type to the white box on the right side of the window. Add more Expense Types as necessary and remove any mistakenly assigned by clicking the large left-pointing arrow. When all desired Expense Types have been assigned, click the OK button, and OPAS will add each of the adjustments to all musicians and activities that are displayed on the List screen.

This same method can be used to apply adjustments to a single musician for multiple activities. In the example below, the Add Accounting Items function could add modifications such as move-up pay or soloist pay to this violinist for all activities in the Subscription Week 5 Project.

List				Main		Accounting/Arrangements			
Date	Day	Time	End	Project	Activity	Presence Type	Artist	Instrument	
02/25/2002	Mo	07:30	09:00	Subscription Week 5	String Rehearsal	Present	Fishman, Peter	Violin 2	
02/26/2002	Tu	07:30	10:00	Subscription Week 5	Rehearsal	Present	Fishman, Peter	Violin 2	
03/01/2002	Fr	08:00	10:00	Subscription Week 5	Rehearsal	Present	Fishman, Peter	Violin 2	
03/02/2002	Sa	10:00	12:30	Subscription Week 5	Dress Rehearsal	Present	Fishman, Peter	Violin 2	
03/02/2002	Sa	08:00	10:00	Subscription Week 5	Concert	Present	Fishman, Peter	Violin 2	
03/03/2002	Su	08:00	10:00	Subscription Week 5	Concert	Present	Fishman, Peter	Violin 2	

Service Planning Areas

As with the Dates functions of OPAS, different planning Levels exist for personnel functions.

Each Date level in OPAS (Level 1 (the default or plain "Dates" level, Level 2, Level 3, and Planning) has a corresponding Service Level.

Services ...
Service Attendance ...
Service Level 2 ...
Service Attendance Level 2 ...
Service Level 3 ...
Service Attendance Level 3 ...
Service Planning ...
Service Attendance Planning ...
Artists Accountings ...

The information in each of these Service areas comes exclusively from their corresponding Dates and Service Attendance areas. As in the Dates areas, the different Service levels are designed for long-range scheduling, confidential assignment of personnel, and "what if" scenarios.

All Service program areas function in exactly the same way; the only difference between them is the Date/Service Attendance level on which they are based.

Service Levels are re-set only by re-setting the originating Date Level. That is, to change a Service record from Level 3 to Level 2, the Date record with which the services are associated must be changed from level 2 to level 3. All assigned services will then be automatically changed.

See Chapter 3 for more information regarding Date Levels.

Archives

As with other scheduling functions in OPAS (see Chapter 3), the Services area employs archive functions. Individual musician services can be copied from the Services area into the Services Archives area of OPAS, and then the original record can be deleted. This function is intended for the long-term storage of historical pay data, and/or service data for retired or non-active musicians.

To archive personnel service record(s), execute a search or filter so that the desired records appear on the Services List screen. Click the function icon in the upper left-hand corner and choose the Copy to Archive function. Click the Start Function button and OPAS will copy the displayed records to the Service Archives area of OPAS. The original records can then be permanently deleted from the Services area.

Orchestra Member Contracts

OPAS provides the ability to produce contracted agreements with orchestra members, either staff (or core) members or orchestra substitutes.

Contracts for staff or core members of an orchestra can be either created in the Contracts area of OPAS (see Chapter 14) or from the Artist Accountings area (discussed in this chapter and in Chapter 15). Contact Fine Arts Management to discuss and implement the solution that best meets the needs of your orchestra.

Contracts for Orchestra Substitutes are created in the Contract Substitutes area of OPAS. Choose the Main Data | Contract Substitutes menu item.

This area of OPAS functions in exactly the same way as the Contracts area, covered in Chapter 14. Each screen in the program area covers a different parameter of the contract. Basic information and the Dates for which the contract is valid are set on the Main screen.

The Accounting/Arrangements screen is used to specify the financial aspects of the contract. Expenses for the contract can be entered on an ad-hoc basis in the Expenses grid. This method is identical to that of soloist contracts. Or expenses can be specified in the center grid - Contract Accountings. Clicking the green "+" key will reveal a list of all Expense Types. Expense types added to the contract in the same way as those in the Services area. Expenses entered in this way become integrated with other payroll expenses.

Printed contracts for orchestra substitutes can be generated from this area of OPAS.

Chapter

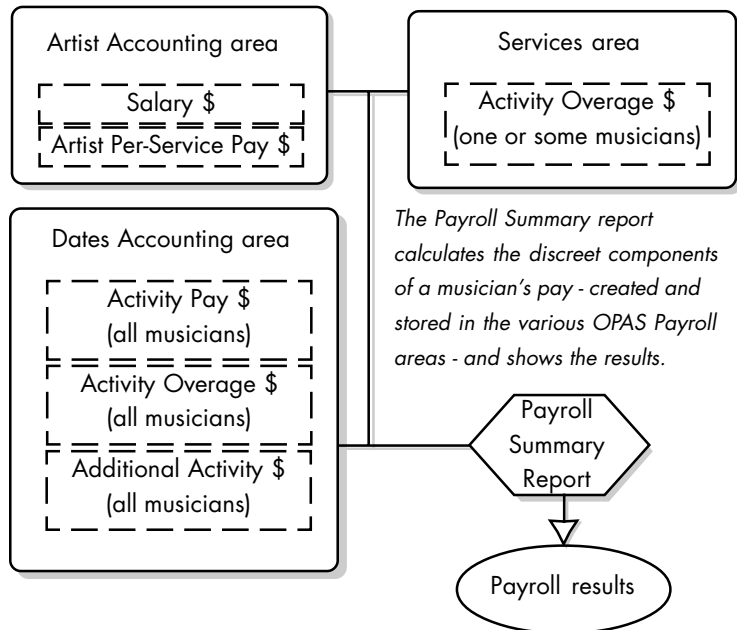
17

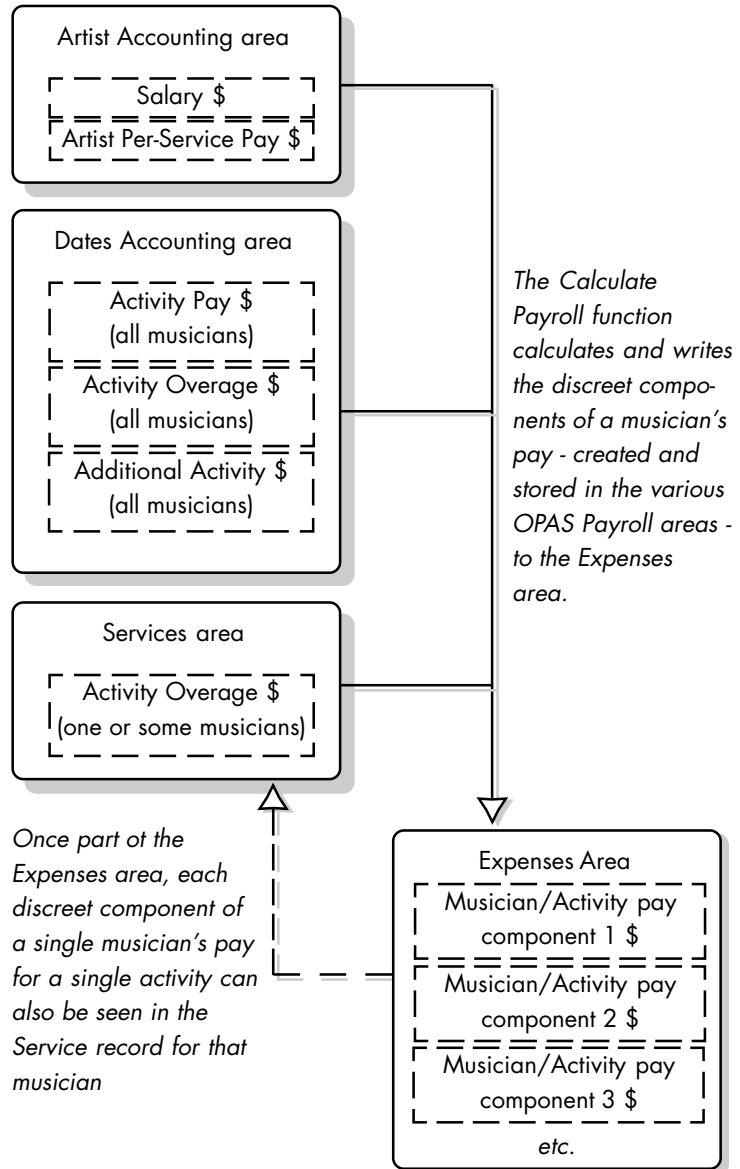
Chapter 17 Payroll Totals and Analysis

Overview

OPAS provides the means to analyze and total orchestra payroll in a controlled environment so different scenarios can be tested before the payroll is summed and written to the Expenses section. Chapter 16 describes the different components of individual orchestra member's pay. This chapter describes the way in which these individual components are combined and analyzed.

The individual line items or components of personnel pay are created and stored in the Services area of OPAS. When in the Services area, built-in reports (outlined below) perform payroll calculations and display the total amounts. When payroll is final, OPAS functions (outlined below) perform the same calculations as the built-in reports, but instead of creating a set of total amounts to be viewed, write the results to the OPAS Expenses area.





The report and function use the same code and sequence of operations so that the results displayed in the report are identical to those that are permanently written to the Expenses area - only the output changes. Once the payroll expenses become part of the OAPS Expenses area, each distinct line item that comprises the musician's pay for that activity is written back to the Services area (in the Expenses grid) for export, printing, analysis and future reference.

These components are drawn from the Activities, Dates Accounting and Services area as indicated in Chapter 16. The lines in this grid are replicated in the Expenses area of OPAS (more precisely, the lines in this grid read information from the Expenses area. The data itself resides in one program area - Expenses - but is also visible in the Services area).

Order	Total	Date	Type	Text	Fixed
\$ 0.00					

Order	Expense Type	Amount	Text	Account No.	Amount	Percent
1	Personnel Move-Up		Replaced B. Stadleman		\$ 0.00	5.00

The Accounting screen for this Artist on this date shows an empty Expenses grid (the top grid). This indicates that the Calculate Payroll function has not been run.

Order	Total	Date	Type	Text	Fixed
1	\$ 198.50	03/02/2002	Personnel Core Player Fee		<input checked="" type="checkbox"/>
2	\$ 9.93	03/02/2002	Personnel Move-Up Pay		<input checked="" type="checkbox"/>
\$ 208.43					

Order	Expense Type	Amount	Text	Account No.	Amount	Percent
1	Personnel Move-Up		Replaced B. Stadleman		\$ 0.00	5.00

After the Calculate Payroll function has been run, the Expenses grid on the musician's Accounting screen shows the discreet components and the total of the musician's pay for the activity.

Running Payroll Reports and Functions

Payroll reports and payroll functions are executed on a particular set of musician services. These can be services for the entire orchestra for the rehearsals and concerts within a Project, all services that take place within a week, services for a particular subset of the orchestra, or for a single musician. The set of musician services is first defined, and then the payroll report and/or function is executed on that set. Therefore, it is important that Users of the payroll functions are familiar with the various search and filtering operations of OPAS. These search and filtering techniques are used to identify the musicians and services for which payroll will be analyzed, exported, and/or calculated. See Chapters 20 and 21 for more information on search and filtering techniques.

Payroll Summary Reports

Payroll summary and analysis reports are generated in the Services area of OPAS.

To open the Services program area, choose the Main Data | Services | Services menu item. The operations and fields of the Services area are covered in Chapter 16.

Using the OPAS search and/or filter methods, isolate the set of musician services that should be included in the payroll analysis.

For the purpose of example, this document will use the cello section for the Subscription Week 4 Project of the 2001-02. This Project contains four rehearsals, two concerts and one run-out concert. For the purposes of example, it is assumed that the Concert on January 12 is broadcast live, for which each musician in the orchestra receives an \$87.50 fee. Furthermore, it is assumed that cellist Louis Crawford took ill and was replaced by Tricia Bosnelli for some of the rehearsals and all the performances. (Note: If the demonstration database is being used, select the 2001-02 Season, Subscription Week 4 Project and cello section from the Services "Green Screen" and press the F8 key on the keyboard).

See illustration next page

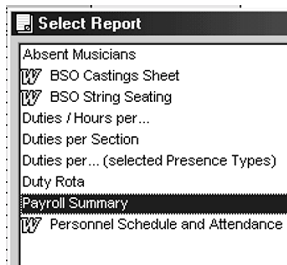
Date	Day	Time	End	Activity	Project	Artist	Instrument	Presence	Order
01/07/2002	Mo	07:30 PM	09:00 PM	String Rehearsal	Subscription Week 4	Allison, Kristen	Cello	Present	C02
01/08/2002	Tu	07:30 PM	10:00 PM	Rehearsal	Subscription Week 4	Allison, Kristen	Cello	Present	C02
01/11/2002	Fr	07:30 PM	10:00 PM	Rehearsal	Subscription Week 4	Allison, Kristen	Cello	Present	C02
01/12/2002	Sa	10:30 AM	01:00 PM	Dress Rehearsal	Subscription Week 4	Allison, Kristen	Cello	Present	C02
01/12/2002	Sa	08:00 PM	10:00 PM	Concert	Subscription Week 4	Allison, Kristen	Cello	Present	C02
01/13/2002	Su	03:00 PM	05:00 PM	Concert	Subscription Week 4	Allison, Kristen	Cello	Present	C02
01/15/2002	Tu	08:00 PM	10:00 PM	Run-Out	Subscription Week 4	Allison, Kristen	Cello	Present	C02
01/11/2002	Fr	07:30 PM	10:00 PM	Rehearsal	Subscription Week 4	Bosnelli, Tricia	Cello	Present	
01/12/2002	Sa	10:30 AM	01:00 PM	Dress Rehearsal	Subscription Week 4	Bosnelli, Tricia	Cello	Present	
01/12/2002	Sa	08:00 PM	10:00 PM	Concert	Subscription Week 4	Bosnelli, Tricia	Cello	Present	
01/13/2002	Su	03:00 PM	05:00 PM	Concert	Subscription Week 4	Bosnelli, Tricia	Cello	Present	
01/15/2002	Tu	08:00 PM	10:00 PM	Run-Out	Subscription Week 4	Bosnelli, Tricia	Cello	Present	
01/07/2002	Mo	07:30 PM	09:00 PM	String Rehearsal	Subscription Week 4	Crawford, Louis	Cello	Present	D02
01/08/2002	Tu	07:30 PM	10:00 PM	Rehearsal	Subscription Week 4	Crawford, Louis	Cello	Present	D02
01/11/2002	Fr	07:30 PM	10:00 PM	Rehearsal	Subscription Week 4	Crawford, Louis	Cello	Sick	
01/12/2002	Sa	10:30 AM	01:00 PM	Dress Rehearsal	Subscription Week 4	Crawford, Louis	Cello	Sick	
01/12/2002	Sa	08:00 PM	10:00 PM	Concert	Subscription Week 4	Crawford, Louis	Cello	Sick	
01/13/2002	Su	03:00 PM	05:00 PM	Concert	Subscription Week 4	Crawford, Louis	Cello	Sick	
01/15/2002	Tu	08:00 PM	10:00 PM	Run-Out	Subscription Week 4	Crawford, Louis	Cello	Sick	

Close

New 03/08/2002 SYS Upd. 03/07/2002 SYS Artist A-Z 61

The list screen of the OPAS Services section displays a separate row for each musician and service. The grid can be sorted by any criteria. In this example, it has been sorted by Artist Name. Therefore, each member of the cello section appears “grouped” together. The total number of musician assignments appears in the lower right of the screen (“61” in the example above)

To generate the Payroll report, click the report icon in the upper left-hand corner of the OPAS screen (or press the F4 key on the keyboard) and choose “Payroll Summary”



OPAS will execute the calculations for each musician’s pay, and display the results on each page of the report. The activities to which a musician is assigned will appear in chronological order on each page, and the various payroll components associated with

the activity will be listed and sub-totaled.

The total payroll for the selected group of musicians (the cello section for Subscription Week 4 in this example) will appear at the end of the report.

The specific formula or sequence of calculations that OPAS executes is specified in Chapter 16. It is important to note that this is the default sequence only, and can be modified to meet the specific needs of an individual orchestra or payroll system.

The Payroll Summary report can be run from any set of criteria in the Services area; a single musician, an orchestra section, a single activity, Project, month, week, Season, etc. It is indeed specifically designed to run a variety of different analysis and “what if” scenarios. As the Payroll Summary report merely calculates and displays the pay due to musicians, there is no change to the database or negative ramifications for running a large number of reports.

Calculate Payroll Function

Payroll summary functions are generated in the Services area of OPAS.

To open the Services program area, choose the Main Data | Services | Services menu item. The operations and fields of the Services area are covered in Chapter 16.

Using the OPAS search and/or filter methods, isolate the set of musician services that should be included in the payroll analysis.

As above, for the purpose of example, this document will use the cello section for the Subscription Week 4 Project of the 2001-02. This Project contains four rehearsals, two concerts and one run-out concert. For the purposes of example, it is assumed that the Concert on January 12 is broadcast live, for which each musician in the orchestra receives an \$87.50 fee. Furthermore, it is assumed that cellist Louis Crawford took ill and was replaced by Tricia Bosnelli for some of the rehearsals and all the performances. (Note: If the demonstration database is being used, select the 2001-02 Season, Subscription Week 4 Project and cello section from the Services “Green Screen” and press the F8 key on the keyboard).

See illustration next page

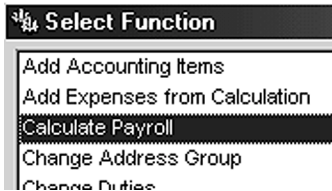
Date	Day	Time	End	Activity	Project	Artist	Instrument	Presence	Order
01/07/2002	Mo	07:30 PM	09:00 PM	String Rehearsal	Subscription Week 4	Allison, Kristen	Cello	Present	C02
01/08/2002	Tu	07:30 PM	10:00 PM	Rehearsal	Subscription Week 4	Allison, Kristen	Cello	Present	C02
01/11/2002	Fr	07:30 PM	10:00 PM	Rehearsal	Subscription Week 4	Allison, Kristen	Cello	Present	C02
01/12/2002	Sa	10:30 AM	01:00 PM	Dress Rehearsal	Subscription Week 4	Allison, Kristen	Cello	Present	C02
01/12/2002	Sa	08:00 PM	10:00 PM	Concert	Subscription Week 4	Allison, Kristen	Cello	Present	C02
01/13/2002	Su	03:00 PM	05:00 PM	Concert	Subscription Week 4	Allison, Kristen	Cello	Present	C02
01/15/2002	Tu	08:00 PM	10:00 PM	Run-Out	Subscription Week 4	Allison, Kristen	Cello	Present	C02
01/11/2002	Fr	07:30 PM	10:00 PM	Rehearsal	Subscription Week 4	Bosnelli, Tricia	Cello	Present	
01/12/2002	Sa	10:30 AM	01:00 PM	Dress Rehearsal	Subscription Week 4	Bosnelli, Tricia	Cello	Present	
01/12/2002	Sa	08:00 PM	10:00 PM	Concert	Subscription Week 4	Bosnelli, Tricia	Cello	Present	
01/13/2002	Su	03:00 PM	05:00 PM	Concert	Subscription Week 4	Bosnelli, Tricia	Cello	Present	
01/15/2002	Tu	08:00 PM	10:00 PM	Run-Out	Subscription Week 4	Bosnelli, Tricia	Cello	Present	
01/07/2002	Mo	07:30 PM	09:00 PM	String Rehearsal	Subscription Week 4	Crawford, Louis	Cello	Present	D02
01/08/2002	Tu	07:30 PM	10:00 PM	Rehearsal	Subscription Week 4	Crawford, Louis	Cello	Present	D02
01/11/2002	Fr	07:30 PM	10:00 PM	Rehearsal	Subscription Week 4	Crawford, Louis	Cello	Sick	
01/12/2002	Sa	10:30 AM	01:00 PM	Dress Rehearsal	Subscription Week 4	Crawford, Louis	Cello	Sick	
01/12/2002	Sa	08:00 PM	10:00 PM	Concert	Subscription Week 4	Crawford, Louis	Cello	Sick	
01/13/2002	Su	03:00 PM	05:00 PM	Concert	Subscription Week 4	Crawford, Louis	Cello	Sick	
01/15/2002	Tu	08:00 PM	10:00 PM	Run-Out	Subscription Week 4	Crawford, Louis	Cello	Sick	

Close

New 03/06/2002 SYS Upd 03/07/2002 SYS Artist A-Z 61

The list screen of the OPAS Services section displays a separate row for each musician and service. The grid can be sorted by any criteria. In this example, it has been sorted by Artist Name. Therefore, each member of the cello section appears “grouped” together. The total number of musician assignments appears in the lower right of the screen (“61” in the example above)

To run the Payroll function, click the Function icon in the upper left-hand corner of the OPAS screen and choose the “Calculate Payroll” function.



Click the Start Function button and OPAS will execute the calculations for each musician’s pay, and write the results to the

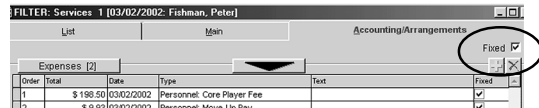
Expenses area of OPAS. Each component of a musician’s pay, as represented in the various personnel areas of OPAS (covered in Chapter 16), becomes a separate line item in the OPAS Expenses area. Therefore, not only is the total payroll amount recorded, but the individual elements that comprise the payroll. This enables future analysis of payroll components as well as payroll totals - for example, in addition to seeing the total orchestra payroll for a specific month, OPAS can also display the total amount paid in Overtime for the same month.

The specific formula or sequence of calculations that OPAS executes is specified in Chapter 16. It is important to note that this is the default sequence only, and can be modified to meet the specific needs of an individual orchestra or payroll system.

Notes regarding the Calculate Payroll function

Since the Calculate Payroll function makes changes to the OPAS database (in the form of the line items written to the Expenses area) care must be taken to only run the function one time for a given set of musician services. This will avoid duplicate entries in the Expenses area. OPAS aids in this area through the “Fixed” expenses check

box at the top of the Expenses grid in the Services area:



As indicated in Chapter 11, OPAS calculation or recalculation functions *do not* run on “Fixed” expenses. Therefore, if the fixed box is checked at the top of the grid, the Calculate Payroll Function will not be run for this musician and activity. The “Fixed” flag can also be applied to individual line items within the grid. If payroll is to be re-run, un-check the Fixed box(es).

The “Fixed” check affects payroll functions only; it has no affect on payroll reports or data export.

After the Payroll function has been run, OPAS displays the results in the Expenses grid of the service record for that musician. These line items mirror those created in the Expenses area, and serve both as a reminder that the Payroll Summary function for this musician has been run, and as a total paid to the musician for the specific service. See the diagram above (page 296) for a representation of this feature.

It bears repeating that the only difference between the Payroll Summary Report and the Payroll Summary Function is that the Report outputs the data in a report format for viewing and/or printing and the Function writes data to the Expenses area of OPAS.

Payroll Analysis in the OPAS Expenses area

As described above, once the Payroll Summary function has been run, the elements or components of the payroll become part of the Expenses area. As such, they are treated like any other item in the Expenses area and can be analyzed, exported, printed, compared to budgetary figures, combined with other expenses, etc.

If an OPAS User does not have permission to see the Services or Payroll areas of OPAS, then that same User will not be able to see expenses generated by the Payroll Summary function in the Expenses area of OPAS.

See Chapter 11 for more information regarding the Expenses area of OPAS, and Chapters 20 and 21 for more information regarding Searches and Filters.

Chapter

18

Chapter 18 Tours

Overview

The Tours program area of OPAS is integrated with the Dates, Personnel, Instruments and Artists program areas, and provides specialized functions for touring an orchestra or ensemble. Before using the Tours area of OPAS, it is advisable to have at least a working knowledge of OPAS scheduling functions (Chapter 3), and Personnel functions (Chapter 15)

Tour personnel are assigned, Travel and Lodging information is stored, and itineraries and rooming lists can be printed.

To open the Tours program area, choose the Main Data | Tours menu item.

The Tours area is divided into eight screens or sections:

- **List** – displays a list of all Touring Projects that meet the criteria you select
- **Main** – contains the basic information about the Tour, and the personnel groups assigned to it
- **Participants** – displays a master list of all personnel (musicians and non-musicians) associated with the tour
- **Instruments** – based upon the musicians assigned to the tour, this screen displays the instruments and touring cases that will be required
- **Schedule** – displays a comprehensive list of all activities on the Tour
- **To-Do List** – a checklist or task list for the tour
- **Management** – provides an overview of personnel and a quick means of assigning personnel to the tour
- **Documents** – links to external digital files related a chosen activity

The Tours area will either open in the “Basic Search” or “Green Screen” search mode if there are more than 1,000 Tour projects in the database (see Chapter 21), or open to the List screen if there are fewer than 1,000 Tours.

List screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area’s contents. In Tours it displays the Project, Season, Name, Tour Days and total number of People in the Tour group.

The columns on the screen can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column)

See Chapter 20 for more information on working with grids such as those on the List screen. The List screen is used extensively to execute Searches and Filters. See Chapter 20 for more information regarding List screen filters.

To see the details of any one Tour, click the mouse once anywhere in that row, then click the Main tab at the top of the window. Or simply double-click the mouse anywhere in the desired row.

Main screen

The Main screen provides an overview of the Tour

See illustration next page

Project – the Project to which this Tour belongs or is associated. The Project and activities must exist in the database (see Chapter 3) before a Tour can be created around those activities.

Date	Text	Notes ...
01/14/2002	Afternoon Travel	Leave 4:00pm
01/15/2002	Concert / Return	

Start	Name	Group Type	Address
01/14/2002	Omni Hotel Stay	Hotel Stay	Omni Char:
01/15/2002	Group Photo	Planned Activity	Barboursvill

Season – the concert season for the tour

Name / Code – a descriptive name and short-hand code for the Tour

Start / End – the start and end dates, based upon the first and last dates of activities in the associated Project

Notes – any descriptive text regarding the Tour

Tour Days grid – This grid stores each individual day in the Tour. It is used to provide a sum of Touring Days, and is used when assigning personnel to the Tour. It also provides a comprehensive schedule of the Tour. See “Creating a Tour” below.

Groups grid – This grid stores each sub-set of the entire touring roster into Tour functions such as Travel and Lodging. See “Creating a Tour” below

Participants screen

This screen contains a list of all orchestra personnel associated with the Tour, both musicians, and associated personnel such as administrative staff, spouses, guests, etc.). See “Creating a Tour” below

Instruments screen

This screen will display the Instruments and Tour Cases required for the tour. OPAS will automatically link Instruments and Cases based upon the personnel assigned. See “Creating a Tour” below

Schedule screen

The Schedule screen displays all the activities (from the Dates area of OPAS) from the Project upon which the Tour is based.

To-Do List

The To-Do List contains a task list or checklist associated with the Tour. The To-Do List in the Tours area functions in the same way as other checklists throughout OPAS. See Chapter 9 for more information regarding To-Do Lists.

Management

The Management screen is used to provide an overview of personnel assignments, and to make personnel assignments quickly. See “Creating a Tour” below

Documents

The Documents screen contains a list of external digital files, linked to the Tour, and the OPAS database. This feature is used throughout the software and is covered in detail in Chapter 19.

Creating a Tour

The creation of the Tour begins on the Main screen. Click the New icon or press the CTRL+N keys on your keyboard to create a new Tour



Defining the Tour

It is assumed that the actual performances on the Tour (and rehearsals if applicable) already exist in the Dates area of OPAS - the Tour section is used to organize these dates along with travel, lodging

and other tour-specific information.

Select the Project and Season at the top of the Tour Main screen. Tours can either be a Project unto themselves (in the case of an extended or annual domestic or foreign tour) or part of another Project (in the case of extended run-outs for Subscription concerts).

The Start and End dates will default to the start/end date of the Project. However, if the Tour itself should extend beyond either of those dates (usually for travel or lodging) these dates should be altered until they span the entire range of the Tour.

Enter the Name of the Tour as it will appear throughout OPAS and on documents

Set the specific Tour Days by clicking the green "+" key at the top right of the "Tour Days" grid. This will open a sub-window that contains every calendar day within the date range specified by the "Start Date" and "End Date" on the Main screen. Select the actual days that are considered part of the tour and click the large right-pointing arrow. Each distinct calendar day must be selected before tour personnel or activities can be assigned to it, so it is recommended that the "Select All" button be clicked and all calendar days be associated with the Tour (even days that will become Free Days).

The final step in defining the structure of the Tour is to create the necessary Travel Groups. "Travel Group" is a generic name given to any event (travel, hotel stay, ancillary events) to which personnel (musicians, staff, etc) will be assigned. These groups are organized by "Type" or general attribute: Flight, Hotel Stay, Ground Transportation, etc.

Create Travel Groups by choosing the Background Data 2 | Tour Group Types menu item.

The List screen displays a list of each type of Travel Group:

See illustration next page

Travel Group Types [Hotel Stay]	
List	Main
Name	Code
Group Meal	MEAL
Hotel Stay	HTL
Planned Activity	PLN
Travel Air	AIR
Travel Bus	BUS
Travel Rail	RAIL

Travel Groups are created on the Main screen of this program area, and consists of a name and code.

Each distinct Travel Group can have its own set of Additional Data. The

Additional Data screen functions here just as it does in other areas of OPAS. See page 420 for more information regarding the configuration and use of the Additional Data screen.

Building a Travel Group

To build a Travel Group for the Tour, click the New icon at the top right of the Travel Group grid.

The Travel Group screen displays information about the event itself (a hotel stay, or airline flight, for example) and the tour personnel (both artistic and non-artistic) associated with the event.

Travel/Groups [Omni Hotel Stay]				
List	Main			
Name	Omni Hotel Stay			
Group Type	Hotel Stay			
Address	Omni Charlottesville Hotel, Charlottesville			
Start	01/14/2002	Mo	End	01/15/2002 Tu
Notes	Hotel is walking distance to the Hall			
Participants/Groups [86]				
Person	Number 1	Ttext 1	Number 2	Text 2
Adkins, Michael	301	Double - NonSmoking		
Allen, Christopher	284	Double - NonSmoking		
Allison, Kristen	283	Double - NonSmoking		
Atkins, Johnathan	301	Double - NonSmoking		
Avesian, Holly	206	Double - NonSmoking		
Baranovsky, Alexandra Ellen	320	Double - NonSmoking		
Baranovsky, Peter	320	Double - NonSmoking		
Baumgardner, Keith	207	Single		

Name – the Name of the event or travel group as it will appear throughout OPAS and on itineraries

Group Type – the type of Travel Group to which the event belongs (see above for more information on Travel Group types)

Address - the specific hotel, airline, bus company, etc. associated with the event. Entries in the drop-down list come from the OPAS Address Book (see Chapter 8)

Start/End date – the appropriate date(s) of the activity. If the event takes place on only one day (ground transportation from one tour venue to another, for example), the End Date can be left blank.

The **Participants/Groups** grid stores all tour personnel associated with the Travel Group. For example, if the Travel Group is a “Hotel Stay” then the grid will contain a list of tour personnel staying at the hotel, room numbers, special assignments or needs, etc.

Personnel can be added to (or removed from) the Travel Group event either individually or in a set. See the “Assigning Personnel” section below

The steps outlined above create the basic structure of the Tour. New items can be added and these steps can be modified or removed at any time. However, the steps above must be completed in order to establish the Tour events (concerts, rehearsals, and travel/lodging) to which personnel are assigned.

Assigning Artistic and Non-Artistic Personnel to the Tour
After defining the Tour, the next step is to assign the Artistic Personnel who will take part in the Tour. Artistic Personnel can be:

- Orchestra Members (both staff members and substitutes)
- Conductor(s)
- Soloist(s)
- Other Artist(s) (hosts, masters of ceremony, etc.)

The Artistic personnel are assigned on the Participants screen of the Tour area. They can be quickly added using the "Load Artists/Personnel" Function. Click the function icon in the top left corner of the OPAS screen (screen shot) and select the "Load Artists/Personnel from Dates" function.



This Function looks to the Project and Season from which the Tour was created:

1. It copies & assigns to the Tour the Conductor, Soloist(s), and Other Participant(s) from the Dates program area
2. It copies & assigns to the Tour all musicians who have been assigned (as "present") to the Project in the Services program area (see Chapter 15 and 16)

Artists can also be individually assigned by clicking the green "+" button at the top right of the grid. This will open a sub-window that displays all the Artists in the Database.

Click the Participants button at the top left of the grid to make individual instrument adjustments to artists, and/or to type any notes about the musician's participation in the Tour.

Assigning Administrative and other Tour personnel

Non-Artistic Personnel are also assigned to the Tour in the Participants screen.

Click the green "+" key at the top right of the grid. This will bring up the entity assignment window that will contain all OPAS Address Book entries for Staff, Musicians, Substitutes, Soloists, and Other entities. Select the desired participants and move them to the grid.



Note: If the tour will include musician spouses, tour guests, board members, critics and/or other non-orchestra personnel, it is helpful to create the appropriate Address Groups for these individuals. Address Groups for these individuals can be created (for example, "Orchestra Member Spouse") and assigned when the person is created in the Address Book area of OPAS. The Address Group

should belong to the System Group "Others". See page 425 for more information on Address Groups and System Groups.

List	Main	Participants	Instruments	Schedule	To: E
Participants [86]					
Person	Instrument	Address Group			
Adkins, Michael	Violin I	Orchestra Member			
Allen, Christopher	Viola	Orchestra Member			
Allison, Kristen	Cello	Orchestra Member			
Atkins, Johnathan	Bassoon	Orchestra Member			
Avesian, Holly	Harp	Orchestra Member			
Baranovsky, Alexandra Ellen	Violin I	Orchestra Member			
Baranovsky, Peter		Spouse / Guest			
Baungardner, Keith	Bassoon	Orchestra Member			
Beaumont, Jennifer	Trombone	Orchestra Substitute			
Blair, Jane R.	Percussion	Orchestra Substitute			
Bosnelli, Tricia	Cello	Orchestra Substitute			
Boyer, Denise	Oboe	Orchestra Member			
Boyer, Howard		Spouse / Guest			
Bryya, Leonid	Contrabass	Orchestra Member			
Campbell, Nathan	Trumpet	Orchestra Member			
Carroll, Phelbe Cynthia	Contrabass	Orchestra Member			

Total number of participants on Tour

Assign Instruments and Cases

The Instruments screen is used to catalog the instruments and travel cases that will be used on the Tour.

Instruments that have been defined and assigned to musicians (see Chapter 12) can be automatically linked to the Tour with the "Load Instruments" function. Click the function icon in the top left corner of the OPAS screen and select the "Load Instruments for all Tour Participants" function.



This Function looks to the musicians on the Participants screen (discussed in the previous section). It copies & assigns to the Tour all instruments associated with the musicians, and all tour or travel cases associated with the instruments.

Instruments and cases can also be individually assigned by clicking

the green “+” button at the top right of the grid. This will open a sub-window displaying all Artists assigned to the tour to whom instruments have been assigned. Add Artists to the main Instruments grid, and the touring case information assigned to the artist’s instrument will also be copied.

Click the “Instrument” button at the top left of the grid to edit the Instrument or Case information, and type in any additional information.

Assign Tour personnel to Travel Groups

The Management Screen is used to match specific Tour Personnel with specific Tour Day activities (such as concerts) and Travel Groups (such as hotel stays). The screen also provides the option of refining any assignments.

Step One - On the Management screen, first click:

- The **Days** button on the far left to view the specific Tour Days that comprise the tour. These will be drawn from the Tour Days Grid on the lower left of the Tour Main Screen. Each column on the Management screen will be a separate Tour Day.

OR

- The **Groups** button just next to the Days button if to view Travel Groups. These will be drawn from the Groups Grid on the lower right of the Tour Main Screen. Each column on the Management screen will be a separate Travel Group.

Step Two - Next, click:

- The **Staff** button to view only Orchestra Members in the far-left column

OR


- The **Substitutes** button to view only Orchestra Substitutes in the far-left column

OR

- The **Others** button to see Conductors, Soloists, Staff, Guests, etc in the far-left column

OR

- The **All** button if to view all assigned tour personnel

Step Three - Finally, click the green Refresh button at the lower right of the screen (next to the save button).  The Management screen grid will display a Column for each distinct activity, and a row for each distinct person (based upon the chosen personnel type).

A bright green box indicates the person is assigned to that Tour Day or Travel Group; a white box indicates they are not.

Clicking once in a column heading will assign all personnel on the left to that Day or Travel Group.

Clicking once on a person's name will assign that person to all Days or Travel Groups.

Clicking in an individual cell or box will assign the person to the associated Day or Travel Group.

Clicking the "Set to Present" button will assign all personnel to all activities

The assignments made in the Management screen will be reflected in the Tour Days grid and the Travel Groups grid on the Main screen.

Refine Travel Group Assignments

Once Tour personnel have been assigned to Travel Groups, further indications can be made of airline or bus seating assignments, hotel rooms, and other travel details.

On the Tour Main screen, double-click any single entry in the Travel Group grid to open that event.

The Participants grid in the lower portion of the screen will contain all

tour personnel assigned from the Management screen.

Double-click any single person to edit or refine the attributes of the person's involvement with this Travel Group activity.

The top four fields, highlighted in yellow, reflect the name, instrument and address group for the person. These fields cannot be changed here.

Travel/Groups/Participants: [Allison, Kristen]	
List	
Person	Allison Kristen
	Orchestra Member
Text 1	Double - NonSmoking
Text 2	
Number 1	283
Number 2	
Notes	

Text 1 / Text 2 / Number 1 / Number 2 – These Text and Number fields will have different meanings, depending upon the nature of the Travel Group. Examples of recommended uses are:

Hotel Stay:

- Text 1 – Hotel Room Type
- Number 1 – Hotel Room Number

Flight:

- Text 1 – Flight Number / gate
- Text 2 – Arrival time / gate
- Number 1 – Seat location

Adding other Information

The Schedule Screen will display the comprehensive list of activities that comprise the tour.

As with other areas of OPAS, the Tour's To-Do screen can be used to build a Checklist of things to do, and can track travel confirmations, visa status, etc. To-Do Lists are

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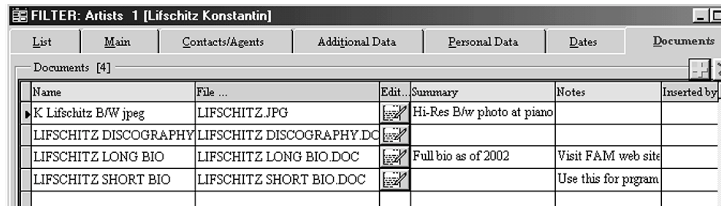
Chapter 19 Document Linking

Overview

All major program areas of OPAS contain a section or screen titled "Documents". This section is always located on the rightmost tab. This screen stores information for external digital files that are associated with the selected or active record(s). Files that are referenced on the Documents screen are stored in a central location, and are available to all users of OPAS - this creates a valuable repository for OPAS users to share information outside of the database itself.

To open or access the Document screen in any program area, click the rightmost "Documents" tab.

Each Document screen in OPAS is identical and contains the following information:



Name	File ...	Edit...	Summary	Notes	Inserted by...
K Lifschitz B/W jpeg	LIFSCHITZ.JPG		Hi-Res B/w photo at piano		
LIFSCHITZ DISCOGRAPHY	LIFSCHITZ DISCOGRAPHY.DOC				
LIFSCHITZ LONG BIO	LIFSCHITZ LONG BIO.DOC		Full bio as of 2002	Visit FAM web site	
LIFSCHITZ SHORT BIO	LIFSCHITZ SHORT BIO.DOC			Use this for program	

Name - the name of the external file as it is referenced in OPAS

File - the standard Windows name of the file.

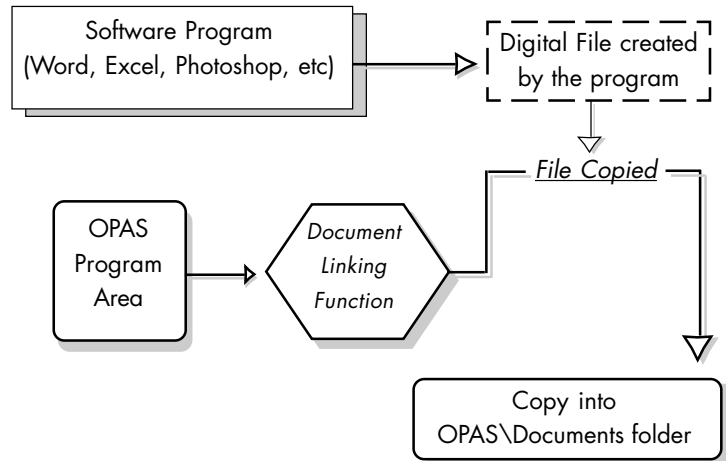
Edit - used to launch the program that created the file, and load the file itself (see "Opening Linked Files" below)

Description - a description of the file as it is referenced in OPAS

Notes - any notes or other information about the file

Inserted By - the OPAS User that created the document link

Documents that are linked or referenced in OPAS can be of any type - word processing, digital photos, digital sound clips, digital diagrams, spreadsheets or even other databases. These files are created in their respective software programs (Word, Excel, PhotoShop, etc.). The document or file is then copied to a central location.

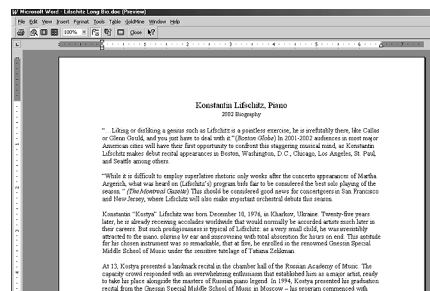


Creating Linked Files

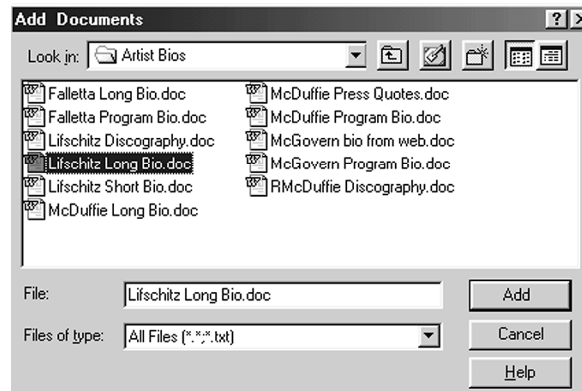
For the purposes of example, these instructions will assume the link being created is in the Artists area of OPAS, and is for a word processing document containing the artist's biography.

A document or digital file must already exist before it can be linked. The artist's biography in this example must have already been

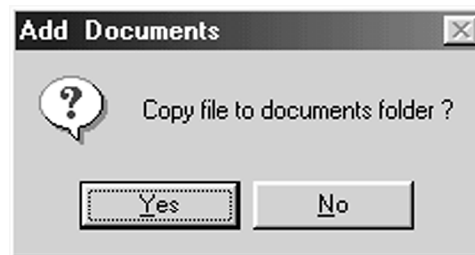
created (in Word or another word processing program) and saved, presumably to your own computer's hard drive, or to a shared drive on your network.



To create a Document link in OPAS, locate the desired record in the OPAS program area - in this example, the Artist in the Artists area, and move to the right-most screen. Click the green "+" at the top right of the Documents Grid. This will open the following window, which is used to select the file to be linked.



Navigate this window to locate the file to be linked. Once chosen, click the Add button. This will present the following window:



Click Yes to copy the file (the artist biography in this example) to the central OPAS location, and write the link to OPAS.

By default, linked files are placed in the central "Documents" folder in the main OPAS directory on the server. All documents or files linked in OPAS will reside in this central directory or folder. This folder can be moved or renamed, but ensure that all OPAS Users who will utilize the Document link feature have full read/write/delete access to the Documents folder.

Should the Documents folder be moved or renamed, the OPAS.INI file on the server must be adjusted to reflect the new location/name. The corresponding entry is in the top [DATA] section of OPAS.INI. See Chapter 24 for more information regarding OPAS.INI file settings.

It is important to note that OPAS does not move the original document or file to the "Documents" folder, nor does it make the file a part of the OPAS database. OPAS copies the file and puts that copy of the file into the "Documents" folder. Only the link, or directions, to the file become part of the OPAS database.

Therefore if the original file resides on your personal hard drive, and you make a change to that file, the copy of file in the OPAS "Documents" folder will not be similarly changed. You must either manually copy the revised file to the "Documents" folder, or "re-link" the file using the method above to copy the revised file over the old one. For this reason, the OPAS document link feature may not be the ideal solution for documents or files that frequently change (see "Examples of Linked Files" below).

Once a document or digital file is linked in OPAS, the contents of any column whose heading appears in light green (Name, Description, Notes) can be changed to be more descriptive or meaningful to OPAS users.

Multiple document links in OPAS can point to the same digital file. For example, a series of concerts in the Dates Section can all link to the same box-office reconciliation spreadsheet in the "OPAS\Documents" folder on the server.

Opening Linked Files

To view or edit a linked file, choose the desired file within the Documents grid. Then click the Edit button.

This action will launch the program that created the file, and display the file. The file is opened locally - that is, on your own computer.

Therefore, if you personally do not have the program that created the original file (or a compatible program) you will not be able to view or edit the file.

When finished viewing or editing the file, save it back to the default "Documents" folder in the OPAS directory. There is no need to make any change to the link entry on the Documents screen.

Removing Linked Files

To remove a document link, choose the desired file within the Documents grid. Then click the red "x" in the upper right of the grid. A prompt will appear, and clicking OK will remove the link information from OPAS.

Note that OPAS intentionally does *not* delete the file itself from the "Documents" folder. Only the link or reference to the file is removed from OPAS. This is to ensure that important documents or files are not unintentionally deleted. You can (and should), however, remove the file from the OPAS\Documents folder so as to not waste disc space.

Examples of Linked Files

Each orchestra's use of the Document linking feature will reflect its own needs and individual use of the software. The following examples indicate only some of the program areas that utilize the Documents screen, and the types of documents that can be linked. The list is not intended to be comprehensive.

Dates area

- Production or Stage Notes
- Copy of the printed program
- Stage Diagrams (created in Visio or another drawing program)
- Concert settlement spreadsheets
- Post-concert House Manager notes or summary

- Post-concert reviews
- Box Office settlement or ticket sales spreadsheets

Artist area

- Artist biographies - long and short forms
- Interviews
- Discography
- Digital Artist photo(s)
- Digital Sound clip(s)

Works area

- Text and translation(s)
- Definitive program notes
- Work origin or history
- Digital Sound clip(s)
- Commission correspondence

Composer area

- Biography
- Digital Photo(s)

Contracts area

- Artist / Guest Conductor contracts
- Itineraries
- Correspondence

Score Rentals / Perusals areas

- Rental Contracts
- Score orders
- Shipping correspondence

Library area

- Donation or Acquisition correspondence
- Insurance information
- Digital sound/photo archival material

Dates Accounting area

- Spreadsheets covering event payroll costs

Notes on Document Linking

As several of the above examples indicate, while Document Linking in OPAS is an invaluable tool in creating a central repository of information, it is likely that some of the documents that are linked should not be viewed by all users of OPAS. Some linked spreadsheets may be off-limits to some users, and it is likely definitive Biographies or Program Notes should be protected against accidental editing. It is important to note that because these digital files are not part of the OPAS database itself, the permission features inherent to OPAS do not transfer to linked files.



If any file linked in OPAS is to be protected, it must be from the native program that created the linked document. If, for example, an Artist Contract is to be password-protected so that only certain users can open it in Word, the password protection features of Word must be employed.

It bears repeating that the Document Linking feature of OPAS does *not* create documents, nor does it store documents within the OPAS database. It creates *a copy of an existing document*, places that copy in a central location (the OPAS\Documents folder on the server), and writes a link to that document in to the OPAS database. Deleting the link does not delete the document, nor does deleting the document delete the link. If two copies of the same document are kept (one on your local hard drive, and one in OPAS\Documents), it is important to either manually place a new copy of the document in to the OPAS\Documents folder, or re-link the document in OPAS if changes are made to the version on your local hard drive.

Chapter

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Chapter 20 Sorting / Filtering Data

Overview

This chapter covers sorting data and filtering data that appears on List screens throughout the program. This document differentiates between sorting/filtering and finding/searching as follows:

“Sorting Data” and “Filtering Data” involve the manipulation of data that is visible on the computer screen. In the majority of cases, this entails manipulating data on the List screen. It can also involve data in sub-windows.

“Searching” or “Finding” data involves revealing data that is not on visible on the computer screen. These procedures (covered in Chapter 21) are used to locate information that meets the criteria you choose. Once OPAS has found the data, the Sorting and Filtering techniques discussed in this chapter can be used.

Sorting data and maneuvering through data lists

The procedures discussed here pertain to the List screen of all OPAS program areas. The List screen is always the left-most screen. For the purposes of example, the Works program area will be used:

List	Main	Instrumentation	Additional Data	Publications/Library	Dates	To-Do List	
Composer	Title	Key	Duration	Catalogue	Genre		
Paganini, Niccolò	CONCERTO, VIOLIN, NO. 2, B MINOR, OP.7	B MINOR	00:29:00	OP. 7	Violin		
Poulenc, Francis	CONCERTO, ORGAN, TIMPANI, STRING, G MINOR	G MINOR	00:19:00		Organ		
Poulenc, Francis	SIINFONETTA		00:30:00		Chan		
Prokofiev, Sergei	CONCERTO, PIANO, NO. 2, G MINOR, OP. 16	G MINOR	00:30:43	OP. 16	Piano		
Rachmaninoff, Sergei	CONCERTO, PIANO, NO. 2, C MINOR, OP.18	C MINOR	00:31:54	OP. 18	Piano		
Rachmaninoff, Sergei	SYMPHONY NO. 2 III E MINOR, OP.27	E MINOR	00:43:05	OP. 27	Symf		
Rimsky-Korsakov, Nikolai	TSAR SALTAN: FLIGHT OF THE BUMBLEBEE	A MINOR	00:01:00		Oper:		
Rodgers, Richard	SOUND OF MUSIC: A SYMPHONIC PICTURE		00:10:00		Oper:		
Rodgers, Richard	VICTORY AT SEA, SELECTIONS				Oper:		
Rodrigo, Joaquin	CONCIERTO ARAUJUEZ, GUITAR AND ORCHESTR	D MAJOR	00:22:16		Guita		
Rossini, Gioachino	SCALA DI SETA: OVERTURE	C MAJOR	00:06:00		Overt		
Rossini, Gioachino	WILLIAM TELL: OVERTURE	E MAJOR	00:12:00		Overt		
Saint-Saens, Camille	CONCERTO, PIANO, NO. 2, G MINOR, OP.22	G MINOR	00:23:00	OP. 22	Piano		
Saint-Saens, Camille	SYMPHONY NO. 3 III C MINOR, OP.78, (ORGAN S	C MINOR	00:34:00		Trum		
Schubert, Franz	SYMPHONY NO. 5 III B-FLAT MAJOR, D.485	B-FLAT MAJOR	00:26:25	D. 485	Symf		
Schumann, Robert	CONCERTO, CFI I O. III A MINOR, OP.129	A MINOR	00:26:00		Cello		

Re-sizing Columns

Any column on a List screen can be re-sized simply by floating the mouse cursor on the vertical line that separates one column heading from another (for example, between the words “Composer” and

“Title” in the example above). The cursor will turn into a double-sided arrow. Click and hold the left mouse button, “dragging” the column to the desired width. It is a Windows convention that you alter the width of the column to your left. Once the column is of the desired width, release the mouse button.

Re-ordering columns

To re-order the columns on this screen, float the mouse cursor over the title of the column (i.e. over the word “Title”, “Duration”, “Composed from”, etc.). The cursor changes to a downward-pointing arrow. Left-click the mouse and hold it down - the column heading will become highlighted. While keeping the left button held down, drag the column right or left to the desired location. The entire List screen turns gray until the column is positioned where you want it. Once in place, release the left-mouse button.

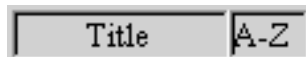
OPAS will remember these settings and save them for future OPAS sessions.

Sorting the List screen by the Contents of a column

The entire List screen (or grid) can be sorted by the contents of any column. To sort the grid, simply click the appropriate column heading. The screen will re-sort by that column, in ascending order (either alphabetically or numerically depending on the contents of the field); blank fields will come first. If that same column is clicked again, the sort order will be resorted in descending order.

The column by which the grid is sorted will be highlighted in bright green.

The order by which the grid is sorted (ascending or descending) is indicated at the bottom of the screen. “A-Z” indicates ascending order, and “Z-A” indicates descending order. The example below would indicate that the grid is sorted, in ascending order, by the contents of the “Title” column.



Maneuvering through the List screen

To jump to any specific record in the list, type the first letter or number corresponding to the information you want.

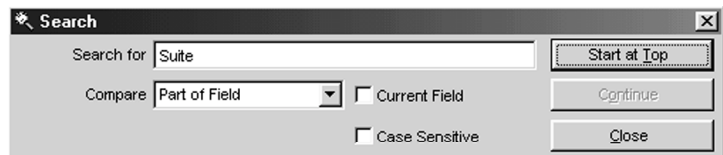
For example, to find all works beginning with the word “Symphony”:

- a. Sort the Grid by the Work title (either ascending or descending) by clicking the column heading “Title”
- b. Click the mouse once anywhere in the title column
- c. Type the letters “sy” - OPAS will jump to the block of works beginning with “Sy...” (Note: when typing multiple letters, there must be no more than one or two seconds between each letter)

CTRL+F Function

OPAS makes it possible to maneuver throughout the entire List screen, regardless of column, with the CTRL+F function. This feature is particularly useful to manage and further examine the results of a filter without having to execute an additional filter. The CTRL+F function works exclusively on the List screen, and works in combination with any other search or filter functions that have been employed.

Pressing and holding the CTRL key on the keyboard, then tapping the “f” (CTRL+F) key will open the “Search” window:



Type the criteria by which OPAS should conduct the search, and click the Start at Top button to begin the search.

Comparison options: Part of Field / Whole Field / Start of Field- These three options indicate how literal OPAS will be when searching. For the sake of example, assume the CTRL+F function is carried out on the Works List screen.

If the criterion typed into the "Search for" field is "Suite" (as in the example above), and the search option is "Part of Field", OPAS will find works with titles such as "Suite for Strings" and "Lyric Suite".

If the criterion is "Suite", and the search option is "Whole Field", OPAS will find works with titles consisting of the single word "Suite".

If the criterion is "Suite", and the search option is "Start of Field", OPAS will find works with titles such as "Suite for Strings" but not "Holberg Suited" or "Lyric Suite".

The Current Field check box will restrict the search to the column from which the CTRL+F field was invoked. The default value is off, indicating that OPAS will search every field and column on the List screen.

The Case Sensitive check box will restrict the search to values that literally match the contents of the Search for field. If the Search for field contains the word "suite", and the Case Sensitive box is checked, OPAS will skip over any field in which the word "suite" is capitalized (as it was not capitalized in the Search for field).

When the Start at Top button is clicked, OPAS will jump to the first matching instance of the criteria in the List screen. The Continue button will move on to the next matching instance of the criteria. The Start at Top button will start the search over from the beginning, and the Close button will end the search.

Filtering data on the List screen

As mentioned at the opening of this Chapter, the List screen displays information that meets desired criteria. That is, in all program areas of OPAS you will employ the search functions discussed in the next chapter, and OPAS will display the results on the List screen.

The basic filtering functions in OPAS discussed here are used to further filter that data, and to quickly bring large amounts of data on the List screen down to a manageable size. The procedures covered here are carried out in the same way throughout all OPAS program areas.

Filtering by a single field

To filter by the contents any individual field (or cell) on the List screen:

- Click once in the cell or box (it will become outlined)
- Press the F7 key on your keyboard -OR-
- Click the "Filter by Selection" icon at the top of the screen: screen shot

Example - To see all works in the database composed by Mozart, click the composer's name, regardless of the sort order or configuration of the List screen:

List	Main	Instrumentation	Additional Data	Publications/Library
<u>Composer</u>			<u>Title</u>	<u>Compos</u>
Dvorak, Antonin			SYMPHONY NO. 9 III E MINOR, OP.95 (NEW WORK)	1893
Shostakovich, Dmitri			SYMPHONY NO. 9, OP. 70	1945
Haydn, Franz Joseph			SYMPHONY NO. 101 III D MAJOR (THE CLOCK)	1793
Shostakovich, Dmitri			SYMPHONY NO. 13, OP.113 (BABI YAR)	1962
▶ Mozart, Wolfgang Amadeus			SYMPHONY NO. 39 III E-FLAT MAJOR, K. 543	1788
Mozart, Wolfgang Amadeus			SYMPHONY NO. 40 III G MINOR, K. 550 [REVISED]	1788
Anderson, Leroy			SYNCHRONIZED CLOCK	
Falla, Manuel De			THREE-CORNERED HAT: SUITE NO. 1	1919
Weill, Kurt			THREEPENNY OPERA: SUITE	1928
Haydn, Franz Joseph			TOY SYMPHONY III C MAJOR	1786

Then press the F7 key on your keyboard or click the icon:



OPAS will filter away all works that do not meet the selected criteria (that is, works for which Wolfgang Amadeus Mozart is not the composer).

see illustration on the following page

The sort order of the grid prior to the execution of the filter will be retained.

Note that in the title bar of the List screen, the program area is now preceded by the word "FILTER:". This indicates that the contents of

the List screen have been created as the result of an F7 filter.

List	Main	Instrumentation	Additional Data	Publications/Library
Composer		Title		Compos
▶ Mozart, Wolfgang Amadeus		CONCERTO, FLUTE AND HARP, C MAJOR, K. 297		1778
Mozart, Wolfgang Amadeus		CONCERTO, PIANO, HO. 9, E-FLAT MAJOR, K.27		1777
Mozart, Wolfgang Amadeus		EINE KLEINE NACHTMUSIK, K. 525		1787
Mozart, Wolfgang Amadeus		IMPRESARIO: OVERTURE K. 486		1786
Mozart, Wolfgang Amadeus		MAGIC FLUTE: OVERTURE, K.620		1791
Mozart, Wolfgang Amadeus		SYMPHONY HO. 39 III E-FLAT MAJOR, K. 543		1788
Mozart, Wolfgang Amadeus		SYMPHONY HO. 40 III G MINOR, K. 550 [REVISED]		1788

To Undo the filter, and reveal the entire contents of the Program Area, press the F9 key on your keyboard, or click the "Show all Records" icon at the top of the screen.



Another F7 filter can also be run based upon the results of the existing filter (discussed in subsequent sections of this Chapter), or a Basic Search or Advanced Search can be run based upon the results of the existing filter (see Chapter 21).

The OPAS filter can also be executed by selecting a *portion* of the field, instead of the entire field. For example, to see all works titled "Symphony...", select just that word Symphony in any cell in the Title column, instead of the whole field itself. Select by dragging the mouse over the appropriate portion of the field - the selected portion will be highlighted:

... Concerto	CONCERTO, FLUTE AND HARP, C MAJOR, K. 297
... wen, Ludwig Van	CONCERTO, PIANO,
... wen, Ludwig Van	SYMPHONY HO. 3 II
... wen, Ludwig Van	SYMPHONY HO. 7 III
... wen, Ludwig Van	SYMPHONY HO. 9 III

Now when the F7 key is pressed (or the "Filter by Selection" icon is clicked), the filter will reveal all Works that begin with the word "Symphony" as shown at left.

List	Main	Instrumentation	Act
Composer		Title	
Beethoven, Ludwig Van		SYMPHONY NO. 3 II	
Beethoven, Ludwig Van		SYMPHONY NO. 7 II	
Beethoven, Ludwig Van		SYMPHONY NO. 9 II	
Bizet, Georges		SYMPHONY NO. 1 II	
Dvorak, Antonin		SYMPHONY NO. 9 II	
Franck, César		SYMPHONY III D MI	
Grieg, Edvard		SYMPHONY III C MI	
Harris, Roy		SYMPHONY NO. 3 II	
Haydn, Franz Joseph		SYMPHONY NO. 101	
Mendelssohn, Felix		SYMPHONY NO. 4 II	
Mirzoyan, Edvard		SYMPHONY FOR ST	
Mozart, Wolfgang Amadeus		SYMPHONY NO. 39 I	
Mozart, Wolfgang Amadeus		SYMPHONY NO. 40 I	
Rachmaninoff, Sergei		SYMPHONY NO. 2 II	
Saint-Saëns, Camille		SYMPHONY NO. 3 II	
Seibert Franz		SYMPHONY NO. 5 II	

This example illustrates an important feature of this filtering method: the filter is very literal in its interpretation of the selected data.

OPAS interprets the search criteria shown here:

SYMPHONY NO. 3 IN E-FLA

to be: “Find all entries in which Title field says “Symphony [and anything else]”. This is why the filter results will contain such diverse entries as “Symphony in D Minor” and “Symphony No. 3” but not, for example, “Toy Symphony”.

The important distinction comes from the fact that the highlighted portion of the field starts at the left boundary of the field. OPAS therefore does not read anything in front of the word “Symphony” - there is nothing there to read. This is why the filter is literally interpreted as: “Symphony [and anything else]”.

If a slight change in the criteria is made, and only the latter end of the word is highlighted:

SYMPHONY NO. 3 IN E-FLAT MAJ

OPAS will now interpret the criteria as: “[anything]ymphony[and anything else]”. While the distinction may seem slight, the fact that the filter does not start from the beginning of the Title field is significant. OPAS will now return all Works where there is anything in front of the letters “ymphony” in the Title field. While in most cases, the “anything” will simply be the letter “S”, it can also be complete words such as in the example of “Spring Symphony” or “Toy Symphony”

This principle demonstrates the need to be consistent in all areas of data entry. For example, if sometimes the word "Concerto" is used, and sometimes the abbreviation "CTO.", then these types of searches become needlessly difficult and will invariably miss data.

Filtering by an entire row or set of rows

To apply a filter to more than one record (more than one line) in this list, hold down the CTRL key on the keyboard while clicking any box within the desired row (do not click the border of the row). The entire row becomes highlighted in yellow.

With the CTRL key held down, as many rows as are required can be selected. If a row is selected by mistake, clicking it again (with the CTRL key still held down).

When the F7 key is pressed, or the "Filter by Selection" icon is clicked, OPAS will filter away all other data, leaving only the rows highlighted in yellow.



To Undo the filter, and to reveal the entire list, press the F7 key on your keyboard, or click the "Show all Records" icon at the top of the screen.



Note that after executing a filter using the CTRL key, the F7 key is used to undo the search, not the F9 key as above.

A filter can also be applied to a set of consecutive records - or consecutive rows - in this list. This can often be faster than individually clicking rows while holding down the CTRL key.

Click once in the box that represents the first item in the group, press and hold the SHIFT key on your keyboard, and then click once in the box that represents the last item in the group.

When the F7 key is pressed, or the "Filter by Selection" icon is clicked, OPAS will filter away all other data, leaving only the rows highlighted in yellow.



To Undo the filter, and to reveal the entire list, press the F7 key on your keyboard, or click the “Show all Records” icon at the top of the screen. Note that after executing a filter using the CTRL key, the F7 key is used to undo the search, not the F9 key as above.

After executing a filter using the CTRL or SHIFT keys, the selected rows remain highlighted in yellow on the List screen. At this point, holding down the CTRL key and clicking any single row or line will remove that individual row from the List screen.

Executing multiple filters


If a filter is executed without using the CTRL or SHIFT keys, additional filters, based upon the results of the first one, can be run.

Example - A filter produces all works in the database that have the word “Symphony” in the title:

<u>Composer</u>	<u>Title</u>
Beethoven, Ludwig Van	SYMPHOHY NO. 3 III E-FLAT
Beethoven, Ludwig Van	SYMPHOHY NO. 7 III A MAJC
Beethoven, Ludwig Van	SYMPHOHY NO. 9 III D MIIIO
Bizet, Georges	SYMPHOHY NO. 1 III C MAJC
Dvorak, Antonin	SYMPHOHY NO. 9 III E MIIIOF
Franck, César	SYMPHOHY III D MIIIOR
Gershwin, George	PORGY AND BESS: SYMPHOI
Grieg, Edvard	SYMPHOHY III C MIIOR
Harris, Roy	SYMPHOHY NO. 3 III ONE MO
Haydn, Franz Joseph	SYMPHOHY NO. 101 III D MA.
Haydn, Franz Joseph	TOY SYMPHOHY III C MAJOR
Mendelssohn, Felix	SYMPHOHY NO. 4 III A MAJC
Mirzoyan, Edvard	SYMPHOHY FOR STRINGS AN
Mozart, Wolfgang Amadeus	SYMPHOHY NO. 39 III E-FLAT
Mozart, Wolfgang Amadeus	SYMPHOHY NO. 40 III G MIIIO
Rachmaninoff, Sergei	SYMPHOHY NO. 2 III E MIIIOF
Rodgers, Richard	SOUND OF MUSIC: A SYMPH

The resulting grid can be re-sorted by any criteria by clicking the appropriate column heading.

The grid can also be filtered again - based upon any criteria in the

grid -without losing the results of the first filter. For example, if in the grid on the preceding page “C Major” is clicked in the Key column, and the F7 key is pressed (or the “Filter by Selection” icon  is clicked) OPAS will base the results of the second search on the results of the first, and not on all works in the database.

This sequence of two filters would produce a List of all compositions in OPAS that have the word “Symphony” in the title, and that are in the key of C Major (this sample contains only two such works):

List	Main	Instrumentation	Additional Data	Publication
Composer	Title	Composed	Key	
Bizet, Georges	SYMPHONY NO. 1 III C MAJOR	1855	C MAJOR	
Haydn, Franz Joseph	TOY SYMPHONY III C MAJOR	1786	C MAJOR	



NOTE: These filtering techniques are important in part because whenever OPAS prints a report or document that contains more than one item (for example, a Work Performance History for many compositions), it does so for all items that are visible on the List screen. That is, a filter or search is first executed in OPAS so that the records you need are displayed on the List Screen, and then the report is executed.

Sorting/Filtering in Sub-Windows

The sorting and filtering techniques described above can be executed within the sub-windows used to add soloists, other performers, and entities throughout OPAS.

For example, the filter buttons found at the top of an OPAS window are also found at the top of the sub-window used to add soloists to an activity.

The first button (from the left) is OPAS’ standard Filter Selected Field icon (the F7 key on the keyboard), and will filter the list based on whatever value is select. For example, if the word “Piano” is clicked, and then the Filter Selected Field icon is clicked, only Artists of the instrument type “Piano” would appear in the list.



Soloist	Instrument	Code	Main	Section
Avesian, Holly	Harp	Hp	<input checked="" type="checkbox"/>	Harp
Azkoul, Jad	Guitar	GU	<input checked="" type="checkbox"/>	Strings
Barrueco, Manuel	Guitar	GU	<input checked="" type="checkbox"/>	Strings
Beck, Steven Samuel	Piano	Pf	<input checked="" type="checkbox"/>	Keyboard
Campbell, Nathan	Piccolo/Pett	PT	<input type="checkbox"/>	Trumpet
Campbell, Nathan	Trumpet	Tp	<input checked="" type="checkbox"/>	Trumpet
Chee-Yun,	Violin	Vl	<input checked="" type="checkbox"/>	Strings
Clark, Graham	Tenor	v5	<input checked="" type="checkbox"/>	Solo Voice
Coombs, Melissa	Soprano	v1	<input checked="" type="checkbox"/>	Solo Voice

The second button is OPAS' standard Show All Records button. It reverses the action of the Filter Selected Field button and shows the entire list of entities.

The third button, "Select all", is self-explanatory. It selects and highlights the entire list of visible entities.

The "Invert selection" button will select/highlight the entire list of visible entities, except for the one you currently have highlighted.

The column sort features described above are also enabled on these sub-windows; click the desired column heading to sort the criteria by the contents of that column.

Chapter

21

Chapter 21 Finding Data

Overview

This chapter discusses the techniques used to find data within the OPAS database. Finding data is the most common program function of OPAS - as an average OPAS database will contain enormous amounts of data, spread out over the various program areas, learning how to search for data is a critical skill for use of the program.

This manual differentiates between finding/searching for data and sorting/filtering data as follows:

“Searching” or “Finding” data involves revealing data that is not on visible on the computer screen. These procedures are used in every OPAS program area, and will locate information that matches the criteria you choose.

“Sorting Data” and “Filtering Data”- (see Chapter 20) - involve the manipulation of data that is visible on the List screen of a program area. Once OPAS has found the data, the Sorting and Filtering techniques discussed in the previous chapter can be used.

OPAS provides two basic search methods - the “Green Screen” or Basic Search, and the Advanced Search.

Basic Search / “Green Screen” Search

This search method is the most common and versatile method used in OPAS. It is applied in any program area, and on any single screen or combination of screens (except the List screen). It is often referred to as the “Green Screen” search mode as all fields in the program appear tinted in green when in this search mode.

This Basic Search is automatically applied whenever a program area is opened, and the number of records in that program area exceeds 1,000. For example, if there are more than 1,000 composi-



tions in the Works area of OPAS (which will invariably be the case), OPAS automatically opens the Works area in the Basic Search or “Green Screen” mode.

This improves the speed and logic of using the software - the assumption is made that you would not want to wait while OPAS loads all records of a program area, and that when entering any section of the program you have a good idea of what you want to

see. If for any reason you *do* want to see the entire contents of any section with more than 1,000 records, simply click the icon shown at left, or press the F9 key on your keyboard.



The procedure for executing a Basic Search is the same in all OPAS program areas.

- a OPAS will open the program area in the Basic Search/“Green Screen” mode, or press the F6 to enter this search mode, or click the icon shown to enter this search mode 
- b Enter the criteria by which OPAS should execute the search, using as many or as few screens and fields within the program area as are necessary.
- c Press the F8 key on the keyboard, or click the icon shown at right to execute the Search 
- d Or, bypass the search by pressing the F9 key on the keyboard, or click the icon shown. The F9 key ignores any search criteria entered and displays all records in the program area



OPAS will display the results of a Basic Search on the program area’s List screen.

For example, to search the database for all compositions written by Mozart that are scored for two flutes, open the Works program area

(the Works program area is covered in detail in Chapter 5). The Works program area will automatically open in the “Green Screen” mode.

In the Composer field, select “Mozart, Wolfgang Amadeus” from the drop-down list:

EDIT FILTER: Works 1			
List	Main	Instrumentation	Additional Da
Composer	Mozart Wolfgang Amadeus ▼		
Title			
Title 2			

Then click the Instrumentation tab (all fields stay highlighted in green), and type the number “2” (without the quotes) into the Flutes field:

EDIT FILTER: Works 1								
List	Main	Instrumentation	Additional					
Instrumentation								
Fl	Ob	Cl	Ba	Hr	Tp	Tb	Tu	Ty
2								

Finally, press the F8 key on the computer keyboard, or click the “Apply Filter” icon at the top of the screen:



OPAS searches the database for all compositions that meet the specified requirements and displays the results in the List screen. The contents of the grid are, by default, sorted by the Composer’s Last Name. Once on the List screen, further filters and sorts can be done with the data as outlined in Chapter 20.

To Undo or Clear the filter, either press the F6 key to re-enter the “Green Screen” search mode, or the F9 key to clear the criteria and show all records in the program area.

General Notes regarding the Basic Search

- When criteria is entered in different fields, OPAS combines the criteria with the word "And". Therefore, the "Green Screen" search executed on the Program screen of the Dates shown below would find all activities that are part of the 2001-02 Season *and* had Beethoven on the program.

The screenshot shows the OPAS Program screen with the following fields and values:

Date	Time	End	H/Min	Svcs.	Week	Month	Year	PW	SLEP	Season
/ /										01-02
Program: [0]	<000000>	No.		Title						
Order	Composer	Title	Title 2	Title 3	Du					
	beethoven									

- The F6 key will cause OPAS to enter the "Green Screen" search mode in any program area.

Wildcards

Wildcards can be used when executing a "Green Screen" search. This enables searches to:

Match data in *any part* or location within a field

Match data in a *specific place* within a field.

Wildcards can be employed in Basic Searches through OPAS. This example will use wildcards in the Works area.

To search for all compositions in the database having the word "March" in the title, open the Works program area (the Works program area is covered in detail in Chapter 5). The Works program area will automatically open in the "Green Screen" mode.

If only the word "March" is typed into the title screen as shown below, OPAS will return only works in which the title begins with the word "March".

The screenshot shows the OPAS Works title screen with the following fields and values:

Title	Title 2
March	

To expand the search and include works having the word "March" anywhere in the title, or in a specific place in the title, wildcards must be used. The wildcard character in OPAS is the asterisk (*) (Shift + 8 on your keyboard). Including this wildcard character in effect tells OPAS to find the indicated characters or word "plus anything else." Moreover, the wildcard character functions differently depending upon where in the field it is placed .

Using the word "March" in the Title field as an example:

March* - instructs the "Green Screen" search to return "all records in which the Title starts with the word 'March' and is followed by anything else". Note that this is exactly the same as the default filter. That is, "March" alone also tells the filter to return "all records where the Title starts with the word 'March' and is followed by anything else".

Title	March*
Title 2	

***March** - instructs the search to return "all records in which the title has anything at all, but ends with the word 'March'" ("Washington Post March", for example)

Title	*March
Title 2	

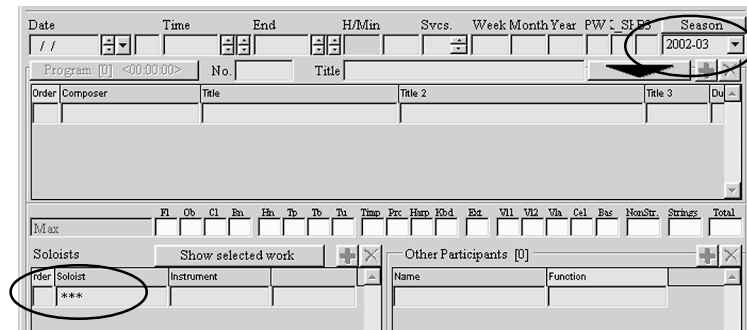
March - instructs the search to return "all records where anything comes before and/or anything comes after the word 'March'". Or, more commonly, return "all records containing the word 'March' anywhere in the field". (For example, 'Turkish March' from the <The Ruins of Athens>, Opus 113

Title	*March*
Title 2	

General Notes regarding Wildcards

Wildcards can be used in any field in OPAS. For example, typing “*Bach” in the Composer field would return all works by J.S. Bach, C.P.E. Bach, and any other Bach in the database.

Wildcards are commonly used to return records that have any contents at all, regardless of what those contents may be. The common way of achieving this is to place three asterisks in a row as the search criteria. This literally instructs OPAS to return all records in which the field has “any value, followed by any value and ending with any value”. For example, to find all concerts in the 2002-03 season that have a soloist, regardless of instrument, the Basic Search screen would look like this:



Split Fields in Basic Searches

Drop-down fields in OPAS are split whenever they are displayed in the Basic Search or “Green Screen” search mode. These fields allow direct input of any kind to be used as the filter criteria, instead of a single item from the drop-down field. Simply type information into the adjacent field, and that criterion will be used as the search criteria. Any search criteria typed into these fields can use the wildcard character: “ * ”

For example, in the Dates area of OPAS, instead of choosing a specific Subscription Week project from the drop-down list, type “sub*” (without the quotes) into the field adjacent to the Project drop-down field:



The search will then return all Activities with a Project name beginning with "Sub"; in other words, all activities in all Subscription Projects.

Similarly, some areas of OPAS (such as the Library) allow for the selection of a Composer and Work combination in the "Green Screen" search. This combination of Composer and Work can be searched independently - works can be searched independent of the composer, and vice-versa.

Advanced Search

The Advanced Search is the most powerful OPAS search option, allowing for complex and refined searches on the database. This search mode operates directly on the tables and fields that form the underlying OPAS database. As such, it is recommended that you have a familiarity with OPAS before attempting these search techniques.

The Advanced Search is used primarily to create searches that include criteria such as "or", "not", "greater than", "before", etc. The Advanced Search is not limited to joining fields by the criteria "and", as is the Basic search (see above).

The procedure for executing an Advanced Search is the same in all OPAS program areas.

- a. When in a program area, press the F5 key or click the icon shown at right to enter this search mode
- b. OPAS will open the Advanced Search window shown on the next page. This window looks and functions the same in all program areas. Build the search criteria, and modify/save the search if needed.
- c. Click the "Execute Search" button to execute the Search



OPAS will display the results on the List screen in the program area from which the advanced search was executed.

To Undo or Clear the filter:

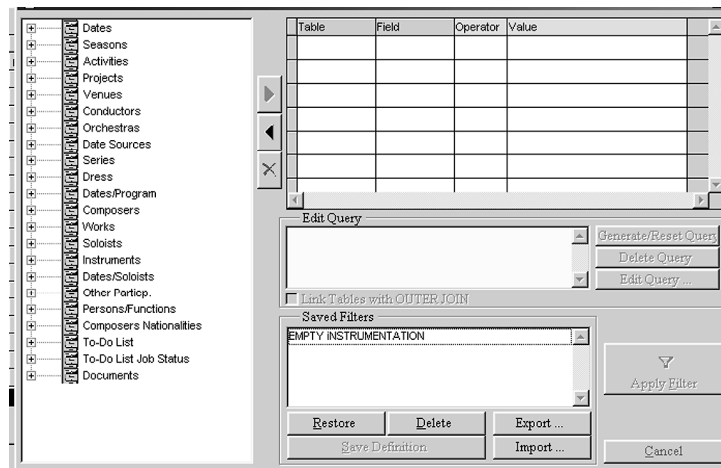
Click the icon shown at right or press the F9 key to clear the criteria and show all records in the program area.



Or click the icon shown at right or press the F5 key to re-enter the Advanced Search screen



Or click the icon shown at right or press the F6 key to enter the Basic Search or "Green Screen" search mode.



The Advanced Search screen is divided into three areas. The tables and fields on the left side of the screen are representative of the program area from which the Advanced Filter originated. The top right area is used to store and combine the search criteria. The lower right of the screen contains the search commands and options.

Criteria for the search are selected from the left side of the screen by clicking the appropriate table and field name. Next, choose the Operator (=, <, >=, etc), and type in the value against which the search should execute.



NOTE: if a search is started in the Basic Search mode (described in the previous section of this chapter), OPAS will “passed through” the Basic Search criteria to the Advanced Search window for you.

As an example, to search for all compositions in the database that use piano as a solo instrument, and were composed after 1872, the Advanced Search must be used (because there is no way to convey “after 1872” in the Basic Search). To see works composed after 1872, you will need to indicate that the “composed from” value should be greater than 1872 - the Advanced Filter allows this distinction.

In the Works program area, from any screen, press the F5 key, or click the “Advanced Search” icon to enter the Advanced Search screen. On the left side of the window, extend the Works menu by clicking the “+” icon key next to the word “Works”. From the resulting menu, double-click the words “Composed from” and click the mouse on the drop-down arrow in the Operator column. Select “greater than” (>), (which in this case means “after”). Then click the mouse once in the Value column, and type 1872

Follow the same procedure to indicate the solo instrument. Expand the Solo instruments menu by clicking the “+” icon next to the words “Solo instruments”. Double-click the word “Name” and when it appears on the right side of the screen, type the word “piano” (without the quotes) in the Value column.

Table	Field	Operator	Value
Works	Composed from	>	1872
Solo Instrument	Name	=	piano

Finally, click the green “Execute Search” button and the results will be displayed in the List screen of the Works program area.

General Notes regarding the Advanced Search

The Advanced Search in OPAS can be activated from any screen, including a “Green Screen” Basic Search. In fact, if search criteria

are filled in on a “Green Screen”, and then the F5 key is pressed to enter the “Advanced Search” screen, the criteria that comprise the Basic Search will be passed through to the Advanced Search. In this way, Advanced Searches are often used to refine or complement Basic Searches.

Editing Advanced Searches

An Advanced Search can include such cases or statements such as “Or”, “Not” and the like. The procedure involves creating the basic structure of the filter using the techniques outlined above, then editing that filter statement. In database language, the filter statement is called a query, so OPAS will call the procedure editing a query.

For example, to search for all activities in the 2001-02 Season that were either part of the Subscription or the Family Concert projects, the parameters of the Advanced search would be:

Table	Field	Operator	Value
Seasons	Code	=	2001-02
Projects	Name	=	sub*
▶Projects	Name	=	family*

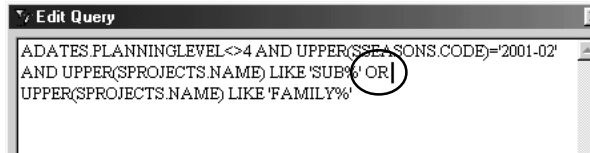
However, until specified, each of these criteria will be joined by the word “and”, just like with Basic Searches. OPAS will search for activities that took place during the 2001-02 season *and* that belonged to any “Subscription” Project *and* any “Family” Project. The query must be edited to account for activities that were in the Subscription or Family Concert projects.

First, click the Generate/Reset Query button. The query will be generated in the yellow window just below the criteria grid.

Table	Field	Operator	Value
▶Projects	Name	=	family*

Edit Query	
ADATES.PLANNINGLEVEL<>4 AND	
UPPER(SSEASONS.CODE)='2001-02' AND	
UPPER(SPROJECTS.NAME) LIKE 'SUB%' AND	
UPPER(SPROJECTS.NAME) LIKE 'FAMIL%'	

Next, click the “Edit Query” button to open the query in a new window. The query will appear in a new window, in standard SQL (Structured Query Language) format. At this point, delete the word “And” and replace it with the word “Or” (without the quotes).



Click the OK Button to return to the Filter Screen where the new, reworded, query is now displayed in the yellow Edit Query box. Click “Execute Search” and OPAS will display the results on the List screen.

Saving Advanced Searches

Advanced Searches in OPAS can be saved for future reference in the Advanced Search screen. Save Advanced Filters by clicking the “Save Definition” button. OPAS then requires that a name be created for the Advanced Search. Once named and saved, the search will appear by name in the “Saved Filters” box the next time the Advanced Search screen is accessed. Searches are saved only in the program area in which they were created.

Importing/Exporting Advanced Searches

Advanced Searches that have been saved can further be imported and exported into the Advanced Search screen within the program area. It is sometimes necessary or more efficient to have an Advanced Search created for you by Fine Arts Management. Click the Import filter to permanently add a query to the Advanced Search screen. Conversely, searches can be exported and shared among other users, or sent to technical support.

Chapter

22

Chapter 22 Reports and Data Export

Reports

OPAS generates documents or reports using one of two methods:

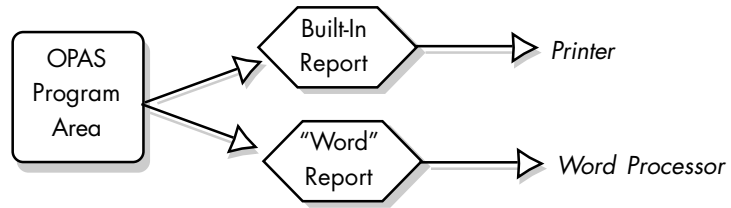
- Internal, “Built-in” reports
- “Word” reports.

Reports are generated by clicking the Report icon in the upper left-hand corner of the OPAS window, or by pressing the F4 key on the computer keyboard. OPAS organizes reports so that only those documents or reports relevant to the currently active program area will appear.



Internal reports are built in to the programming structure of OPAS. They run quickly and offer a virtually unlimited number of calculation and data manipulation options. When internal reports are completed, they can be printed, but not edited. Your orchestra’s logo can be added to built-in reports, and while changes in margin, font and other basic layout elements can be made, additional information cannot be typed, nor can information be removed from the report once it is created.

“Word” Reports is the generic name given to reports that output in your Word Processing program. Typically, this is Microsoft Word (hence the name), but they can also output into WordPerfect version 8.0 or above, or AmiPro. “Word” reports run much more slowly and have a practical, finite number/complexity of queries that can be executed. Once a report is finished, it opens in your word processing program and can accordingly be edited, printed, faxed, saved, etc.



In OPAS, the Microsoft Word icon in front of a report name indicates the report will output to Word. Similarly, the lack of an icon indicates a built-in report.

```

Performance History (Overview)
Works Performed
Years Performed sorted by Instruments
[W] Performance History - Complete
  
```

Whether internal or word-processing, reports are generated using the same technique:

- 1** For reports that pertain to a single record in the database (for example, the performance history of a single artist, or the generation of a single artist contract): In the relevant program area of OPAS search for, or select the record. Maneuver to the Main screen of the program area, and with the record showing, click the Report icon or press the F4 key on your keyboard.
- 2** For reports that pertain to a group of records in the database (for example, a calendar that displays all activities in a particular month, or a performance history for multiple compositions): In the relevant program area of OPAS, search for, and/or filter, the relevant data using any of the search functions outlined in Chapters 20 and 21. With the desired data set visible on the List screen, click the Report icon or press the F4 key on your keyboard.
- 3** The Select Report window will open. Choose the desired report and click the Preview button.



The critical step in running a report is getting the proper data set showing in OPAS *before* the report is run. Some reports are designed specifically to be run for a single record or entity, and will fail if run for multiple records. If you are unsure about the criteria or steps in creating a report, contact Fine Arts Management.

Internal reports and Word reports can be customized, modified and created to better suit the needs of your orchestra or ensemble. Report modifications and creations can be easily added to the OPAS report library - the necessary report files are sent via email, along with instructions for the placement of files, and the proper operation of the report.

The OPAS report library continues to grow and expand with the development of the software. New and revised reports are periodically posted to the OPAS support area of the Fine Arts Management web site:

<http://www.fineartsmanagement.com>

Notes on internal reports

Many internal reports contain the OPAS icon at the top of the report. To change this icon to that of your orchestra, open your orchestra's logo in an image-editing program. Convert the logo to a bitmap (.bmp) file, and reduce it in size until the image is no more than 1.8 inches across and .9 inches tall. The bitmap file should also take up as little memory as possible, the saved file should ideally be less than 50KB in size. Finally, save the file with the filename "Orchestra.bmp" and save it to the main OPAS directory on the server. The file Orchestra.bmp must reside in the same directory as the main OPAS.exe file. Internal reports that utilize a logo will use the file called "Orchestra.bmp"

Logos in built-in reports can be re-sized or removed, and other elements of layout can be altered in the Edit Report area of OPAS. From the main OPAS screen, choose the System | Edit Reports menu item. The resulting screen will contain a list of all reports installed in OPAS. Locate the report by report name, and from the Main Screen,

click the “Edit Report” button. This will open the report in the Visual FoxPro Report Designer. Elementary changes to layout, font and logo placement can be made on this screen. Note: Do not attempt to make any change to the grouping or placement of data fields, or the actual queries that produce the report content - the report will become inoperable. Contact Fine Arts Management for more information regarding the customization of built-in reports.

Notes on Word reports

Before OPAS can generate reports that output to Microsoft Word, an ODBC (Open Database Connectivity) driver must be installed on the computer that will run the report. See Chapter 25 for more information regarding setting up and operating word reports.

Each word processing report is comprised of three separate files. Each of these files resides in the main OPAS\Report_Art directory on your server (or on your own computer if OPAS is run in a stand-alone environment), and all three must be in place in order for the report to run properly. Each of the three report files has the same name, and follows the same syntax:

ProgramArea_ReportName.ars (the report script)

ProgramArea_ReportName.rep (the OPAS report definition file)

ProgramArea_ReportName.rtf (the report template)

The report template is in rtf (Rich Text Format) and can be edited in your word processing program.



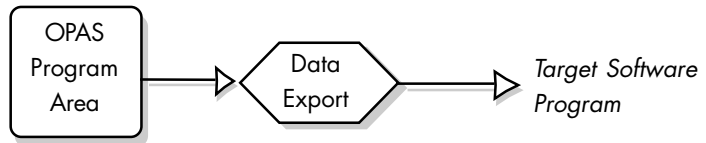
NOTE: contact Fine Arts Management before attempting to edit any report template - improper editing will cause the report to fail.

Data Export

In addition to the formatted reports discussed above, OPAS provides the ability to export the results of any search or filter to a digital file in a variety of formats:

- text file
- Microsoft Excel
- HTML
- Dbase
- FoxPro
- Lotus 1-2-3
- Lotus Symphony
- XML

Exporting data differs from printing a report in that the output from an export is a “flat” digital file. The contents of the export cannot be viewed until opened in the chosen target program. Put another way, the Export feature is used to move data from OPAS into another software application.



NOTE: The data export functions require a working knowledge of the data filter and search features discussed in Chapters 20 and 21.

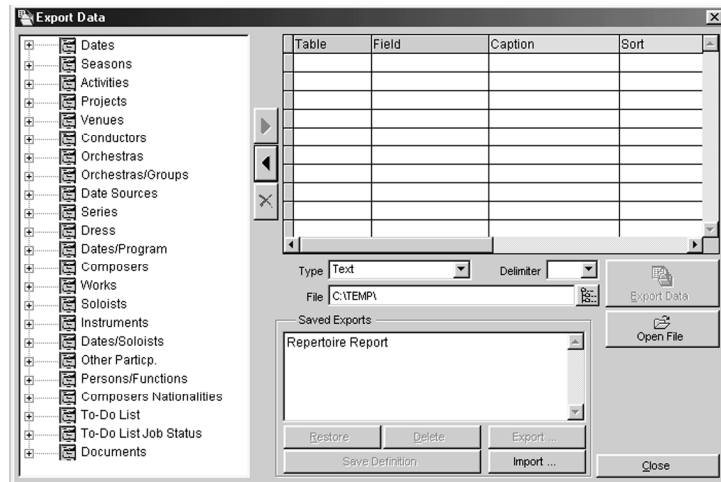
Once a filter or search has been executed in OPAS, the results of that filter can be exported to a digital file.

To create the Export, click the Data Export icon at the top of the OPAS screen:



This will display the Data Export screen, arranged in a similar fashion to the Advanced Search screen (see Chapter 21). The tables and fields on the left side of the screen are representative of the program area from which you entered the Data Export screen. These are the table and field names from the underlying OPAS

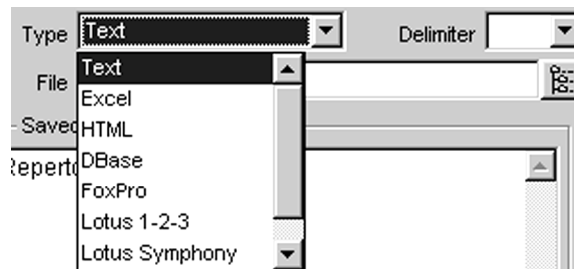
database. The top right area is used to store the data fields to be exported. The lower right of the screen contains the export commands and options.



Expand each program area or table on the left side of the screen, and select the individual fields to be exported.

The Caption field can be used to better define the data field in the target program (the program to which the data is being exported). Ensure that captions do not use spaces. “Concert_Date” is a valid caption, but “Concert Date” is not. The Sort field indicates the order in which the data will appear in the target program.

At the Type drop-down field, choose the data format for the export. If the format is Text, choose the delimiter for the text file.



Finally, click the large Export Data button and the standard Windows Save as screen will open. Navigate to the directory to which the data should be exported, and type the name for the exported file (accept the default value in the "Save as type" window; this will ensure the proper extension is given to the document). Then Click the Save button, and the export will automatically execute and create/save the document with that name.

After the export is complete, the OPAS Data Export screen will remain open. Click the Open File button to launch the target program and open the exported file.

Click the Close button to close the Data Export window.

Selected data from the OPAS program area

"Captions" in the OPAS data export window become the first line of the exported file

	A	B	C	D
1	concert_date	season	project	conductor_last_name
2	09/28/1999	99-00	Subscription Week 1	Falletta
3	10/01/1999	99-00	Subscription Week 1	Falletta
4	10/02/1999	99-00	Subscription Week 1	Falletta
5	10/02/1999	99-00	Subscription Week 1	Falletta
6	10/03/1999	99-00	Subscription Week 1	Falletta
7	10/03/1999	99-00	Subscription Week 1	
8	11/05/1999	99-00	Subscription Week 2	Davis
9	11/09/1999	99-00	Subscription Week 2	Davis
10	11/12/1999	99-00	Subscription Week 2	Davis
11	11/12/1999	99-00	Educational Concerts	Vartanyan

Sample Data Export to Microsoft Excel



Just as with Reports, the critical step in executing a data export is getting the proper data set showing in OPAS *before* the export is created. OPAS will export whatever data is "active" in the program area. If you are unsure about the criteria or steps in creating a data export, contact Fine Arts Management.

Saving Data Exports

Data Exports can be saved by clicking the Save Definition button. A window will open in which the name of the Export is typed. To load a saved export, select it in the window at the bottom of the screen, and click the Restore button. The parameters of the export will be loaded into the top grid. Click the Export Data button and proceed as outlined above.

Data Export routines can also be exported and imported to independent files using the Export and Import buttons.

Chapter

23

Chapter 23 Program Conventions and Basic Operations / Getting Started with OPAS

Structure of an OPAS screen

See Illustration on Next Page

A - Menu Items. Menu items appear on all screens in OPAS. Access them by clicking the mouse or by pressing the ALT key on the keyboard, releasing it, then typing the underlined letter of the menu item. If a menu item or its sub-items are grayed out, then that item is not available

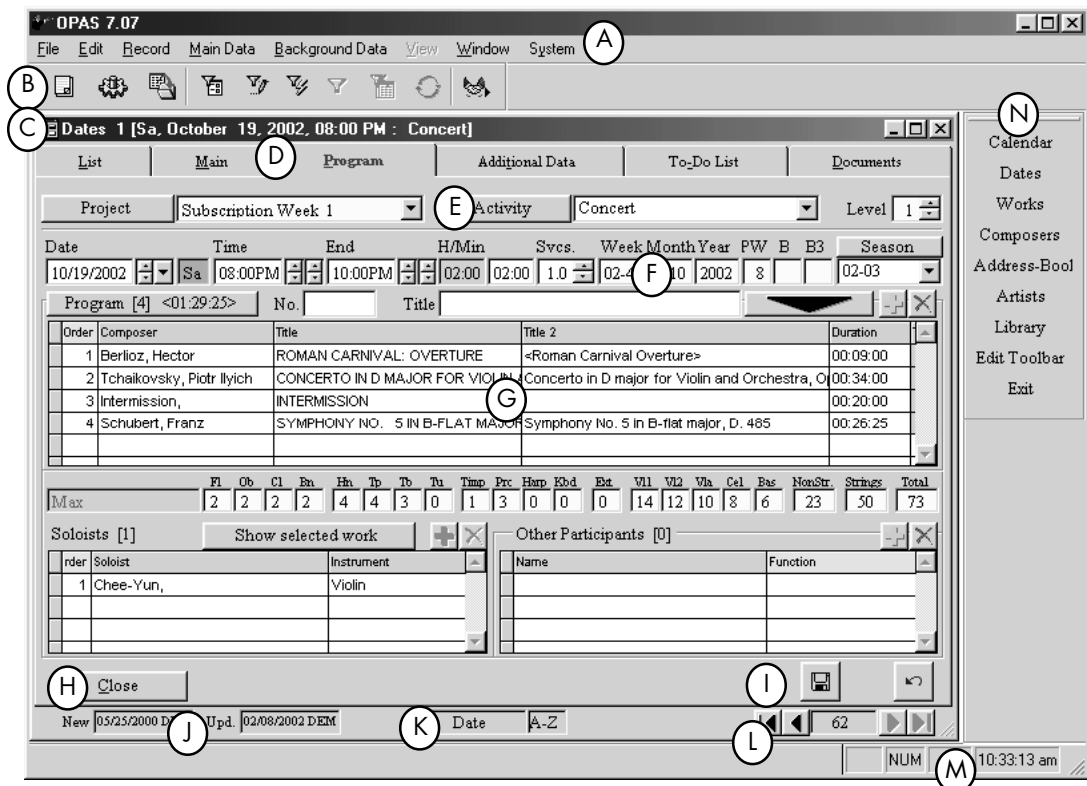
B - Function Icons. Function icons appear on all screens. If they are not available on a certain screen, or do not apply, then they appear grayed out. Most items have a keyboard equivalent (indicated in parenthesis) and are, from left to right:

Reports (F4) - Opens the report window and displays the available reports for that program area. See Chapter 22

Functions - Opens the Functions window and displays the available functions for the program area. Note: Functions are specifically designed to automate tasks and will often be changed the contents of the OPAS database. Do Not execute a function without first knowing what it will do - contact Fine Arts Management with any questions.

Export Data - Opens the Export Data window, allowing the export of data from the current OPAS area into a variety of digital formats. See Chapter 22

Advanced Search (F5) - Opens the Advanced Filter window. See Chapter 21



Basic Search (F6) - Places OPAS into the Basic Search mode. See Chapter 21

Filter By Selection (F7) - Executes a Basic Filter - active only from List Tabs. See Chapter 20

Execute Search (F8) - Executes a Basic Search. See Chapter 21

Show all Records (F9) - Clears the results of any filter, and displays all records in the program area

Refresh (F10) - Refreshes the current screen with the most recent data in the database

Related Data (F11) - Displays a list of related program areas of OPAS. Choosing one of those program areas will open and load it with the currently active data

- C** - Title Bar. The Title Bar will display different information depending upon the OPAS Section. The first word(s) is always the program area name, followed by the details of the currently active record.
- D** - Tabs. Each program area in OPAS is divided into screens or tabs. The currently active tab will display in blue. If the name of the screen/tab appears in red, it indicates there is data on that screen.
- E** - Field Captions. Some field captions in OPAS are actually buttons (such as Project and Activity on the screen shown here). Clicking the Field Caption Button will load the background data for that field.
- F** - Yellow-Tinted Fields. Some fields in OPAS are tinted yellow (such as Week, Month, Year and PW on the screen shown here). A yellow-tinted CD indicates that the field is calculated or dictated from another OPAS function and cannot, or should not, be edited by the User.
- G** - Grids. Grids are used throughout OPAS to store multiple pieces of data (such as works on a program). To add a data item, click the green "+" icon at the upper right of the grid. To remove an item, select it and click the red "x". If a column heading in any grid is light green, that indicates that the User can edit the contents of that column. Sort grids based upon the contents of any column whose heading is light green. To edit a line in a grid, double-click on it. To see related sections of OPAS, float the mouse cursor in the Grid, and Right-Click the mouse.
- H** - Close / OK / Cancel Buttons - These buttons appear in different combinations throughout the various sections of OPAS. "Close" means close the current program area. "OK" means save any changes, close this program area, and where applicable load the (saved) changes into the originating program area. "Cancel" does not save changes, and returns to the originating program area.
- I** - Operation Icons - These buttons appear on every section of OPAS. If they are not available on a certain screen, or do not apply, then they appear grayed out. Most items have a keyboard

equivalent (indicated in parenthesis) and are, from left to right:



Copy Date - (Only available in the Dates and associated program areas) Open the Copy Date window to copy the current date/activity to another date.

New (CTRL + N) - Create a New Record in this program area

New + Copy - Create a New Record in this section, based upon the main data from the current record

Save (CTRL + S) - Save the current record

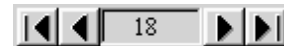
Delete (CTRL + D) - Delete the current record

Restore/Undo (CTRL + R) - Restore any *unsaved* changes

J - New and Upd. The New field indicates the Initials or Code of the OPAS user who created this record and the day on which it was created. The Upd. field displays the Initials or Code of the OPAS user who last updated this record, and the date it was updated.

K - Sort Indicator This displays the field on which the current data selection is sorted, and the type of sort (A-Z means ascending and Z-A means descending)

L - Navigation Icons. The number in the middle of these icons indicates the number of currently active records in the Section. The arrows surrounding the number move forward and back one record at a time. The far arrows move to the first and last record.



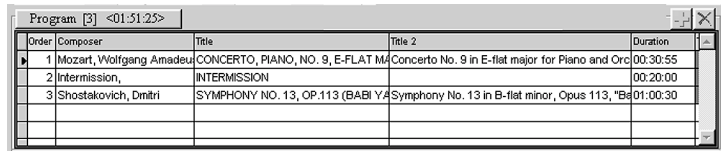
M - System Indicators The first box is inactive. The second indicates if the Numbers Lock is on (NUM appears in the box). The third indicates if the Caps Lock is on (CAPS appears in the box). Your computer's system time also appears here.

N - Program Area Buttons. These buttons or icons open various program areas of OPAS. See Chapter 24 for information on configuring the buttons.

Standard Program Operations

Grids

There are two basic types of Grids used in OPAS:

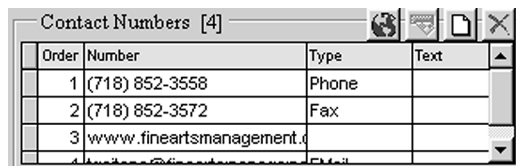


Order	Composer	Title	Title 2	Duration
1	Mozart, Wolfgang Amadeu	CONCERTO, PIANO, NO. 9, E-FLAT MA	Concerto No. 9 in E-flat major for Piano and Orc	00:30:55
2	Intermission,	INTERMISSION		00:20:00
3	Shostakovich, Dmitri	SYMPHONY NO. 13, OP.113 (BABY YA	Symphony No. 13 in B-flat minor, Opus 113, "Ba	01:00:30

- Green "+" icon - open the related program area and add a record to this grid
- Red "x" icon - delete the selected record within the grid
- Green column headings - the contents of the field can be edited by directly typing
- CTRL+Up Arrow - deletes the selected record
- CTRL+Down Arrow - adds a new record

Resize columns by floating the mouse cursor over the vertical line that separates two column headings. The mouse cursor will turn into a double-pointing arrow. Click and hold the mouse button while dragging the column to the desired width.

The title or heading of the grid will be found at the upper left of the grid. Click this title or heading ("Program" in the example above) to open the contents of the grid in a separate program area. The contents of the grid can then be edited.



Order	Number	Type	Text
1	(718) 852-3558	Phone	
2	(718) 852-3572	Fax	
3	www.fineartsmanagement.d		

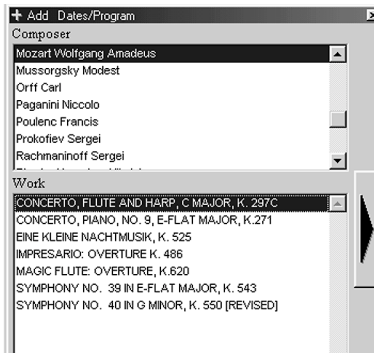
- "New" icon - add a new item to the grid by typing the contents of the field

- Red "x" icon - delete the selected record within the grid
- Web / Email icons - launch a web browser or email program and load the selected address
- Green column headings - the contents of the field can be edited by directly typing
- CTRL+Up Arrow - deletes the selected record
- CTRL+Down Arrow - adds a new record

Resize columns by floating the mouse cursor over the vertical line that separates two column headings. The mouse cursor will turn into a double-pointing arrow. Click and hold the mouse button while dragging the column to the desired width.

Sub-Windows

Adding information to grids is often executed by selecting data from sub-windows. Sub-windows are of two primary varieties.



This sub-window is used to add compositions to programs

Click the mouse once in the top window, and "jump" to a composer by typing the first few characters of the composer's last name. The up/down and Page Up / Page Down arrows on the

keyboard will also navigate this pane.

With the Composer Name highlighted, click the mouse in the lower portion of the window, or press the TAB key followed by the down arrow key to move to the lower portion of the window.

Type the first few letters of the composition name to "jump" to that composition. The up/down and Page Up / Page Down arrows on the keyboard will also navigate this pane. Double-click the composi-

tion name, or click the large right-pointing arrow to add the work to the program.

Press the SHIFT+TAB key to move back to the Composers area of the window.

Soloist	Instrument	Code	Main	Section
Avesian, Holly	Harp	Hp	<input checked="" type="checkbox"/>	Harp
Azkoul, Jed	Guitar	GU	<input checked="" type="checkbox"/>	Strings
Barrueco, Manuel	Guitar	GU	<input checked="" type="checkbox"/>	Strings
Beck, Steven Samuel	Piano	Pf	<input checked="" type="checkbox"/>	Keyboard
Campbell, Nathan	Piccolo/Pettr	PT	<input type="checkbox"/>	Trumpet
Campbell, Nathan	Trumpet	Tp	<input checked="" type="checkbox"/>	Trumpet
Chee-Yun,	Violin	VI	<input checked="" type="checkbox"/>	Strings
Clark, Graham	Tenor	v5	<input checked="" type="checkbox"/>	Solo Voice
Coombs, Melissa	Soprano	v1	<input checked="" type="checkbox"/>	Solo Voice
Danchenko, Victor	Violin	VI	<input checked="" type="checkbox"/>	Strings
Davidson, Anne	Piccolo	PI	<input type="checkbox"/>	Flute
Davidson, Anne	Alto Flute	AF	<input type="checkbox"/>	Flute
Davidson, Anne	Flute	FI	<input checked="" type="checkbox"/>	Flute
Galvin, Eugene	Bass	v7	<input checked="" type="checkbox"/>	Solo Voice
Goode, Richard	Piano	Pf	<input checked="" type="checkbox"/>	Keyboard
Green, Patricia	Mezzo Sopr	v3	<input checked="" type="checkbox"/>	Solo Voice
Kaler, Ilya	Violin	VI	<input checked="" type="checkbox"/>	Strings
Kaler, Ilya	Violone	VL	<input type="checkbox"/>	Strings
Lackey, John	Tenor	v5	<input checked="" type="checkbox"/>	Solo Voice
Lang, Petra	Mezzo Sopr	v3	<input checked="" type="checkbox"/>	Solo Voice
Lee, Sharon	Flute	FI	<input checked="" type="checkbox"/>	Flute
Lewis, Keith	Tenor	v5	<input checked="" type="checkbox"/>	Solo Voice

The other variety of sub-window is used to add data from OPAS program areas to grids. This example shows how soloists, from the OPAS Artists area, are added to a program in the OPAS Dates area.

See page XXX for more information regarding the navigation and sorting of these Sub-windows and grids. Clicking the large

buttons at the bottom of the sub-window ("Artists" in the example above) will open the indicated program area in which changes/additions can be made.

General OPAS Conventions

Field Label program links

Many field labels in OPAS act as buttons that access the program area from which the contents of the field are drawn. This is particularly the case with drop-down fields:

FILTER: Works 1 [Berlioz Hector: ROMAN CARNIVAL: OVERTURE]

List Main Instrumentation Additional Data Publications/Library

Composer Berlioz Hector

Title ROMAN CARNIVAL: OVERTURE

In the example above, clicking the field label "Composer" will open the Composers program area of OPAS. If the drop-down field has an entry in it - Hector Berlioz in the example above - then that value will be automatically loaded in the associated program area.

Resizing / Re-Ordering columns -

See page XXX for instructions on sizing, sorting and ordering columns on OPAS List screens.

Right-Clicking the Mouse -

In most OPAS grids, clicking the right-clicking the mouse will bring up a sub-menu of related areas of the program. Left-clicking on any of the program areas will open it.

Exiting a screen -

Pressing the "Esc" key on your computer keyboard (far upper left corner), or clicking the Close button (lower left corner of the screen) will close the currently active screen and program area.

"Green Screen" mode -

Most program areas in OPAS open to a "Green Screen" - all fields are tinted in green. This indicates that OPAS is in the Basic Search mode, and waiting for criteria to be input. See Chapter 21 for instructions regarding the Basic Search or "Green Screen" mode.

Maximizing Screens -

See Chapter 25 for instructions on maximizing the OPAS screen and individual windows within OPAS.

Program Navigation

Moving from screen to screen within a Program Area -

Click the Tab at the top of the desired screen, or press and hold the ALT key, then tap the underlined letter of the desired screen. Note that there is a difference between pressing and releasing the ALT key (which activates the very top, main OPAS menu items) and pressing and holding the ALT key (which activates the screen names).

Moving from field to field within a screen -

The "Tab" key on the keyboard will move from field to field within a given screen, and Shift+Tab will move backwards from field to field.

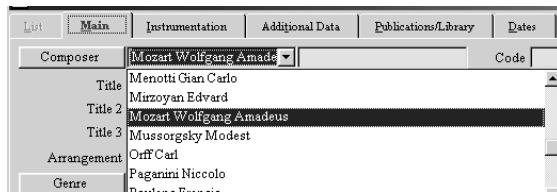
Maneuvering through List screens -

See page XXX for instructions on moving throughout List screens

Drop-Down lists

When a drop-down or combo box field (a field with an downward pointing arrow on its right side) is highlighted, typing the desired contents of the field will cause OPAS to "jump" to that value.

For example, in this composer drop-down field, typing "moz" (without the quotes) will cause the field to "jump" down to Mozart:



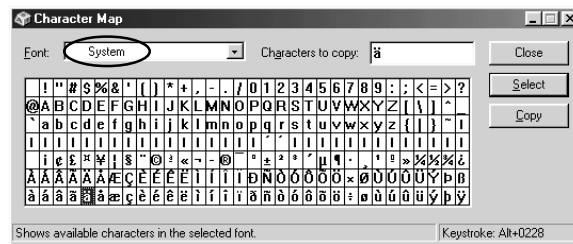
When a drop-down field is highlighted in blue, it can also be maneuvered by using the up and down arrows keys on the keyboard.

When a drop-down field is highlighted, the space bar on the keyboard will cause the list to "drop-down" and display the first seven items on the list (this action is identical to clicking the down-arrow at the right of border of the field). With the contents of the list displayed, the up/down keys and Page Up and Page Down keys on the keyboard will maneuver the list.

Diacritical characters

Diacritical marks can be added to any OPAS text field in one of two ways.

1. Add the mark using a Windows standard ALT+ keystroke. May diacritical characters have a standard keyboard shortcut. For example ALT+0228 will produce the character “ä” (without the quotes). Using these keyboard commands will enter the diacritical characters in any OPAS text field. For a list of diacritical character keystroke equivalents, consult your Windows(r) documentation, or see the Character Map section below
2. Add the mark using the Windows character map. Click the Start button in the lower left-hand corner of your computer screen, and choose Programs | Accessories | System Tools | Character Map. From the resulting screen, choose the desired character by double-clicking on it, and then click the “Copy” button. *Make sure* the font you have selected is System:



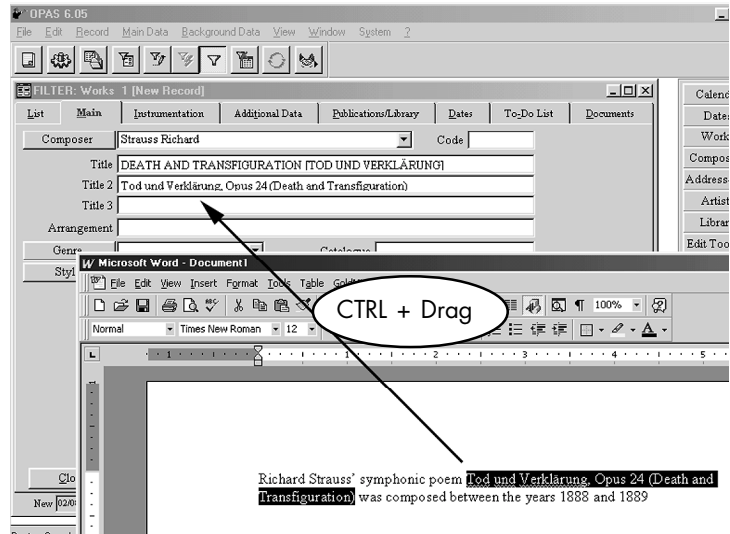
Close this window and in OPAS, press CTRL + V to paste the character into place within the desired field.

Copying Data from other Programs

It is possible to “drag and drop” data between other software programs and OPAS. This technique requires that windows in both OPAS and the other program be sized such that they can both be seen on your computer screen.

In the originating program, hold down the CTRL key on the keyboard and select the data to be copied. While holding down both the CTRL key and the mouse button, drag the selected data “out” of the originating program, and “into” OPAS. Release the mouse button within the desired OPAS field, and the data will be copied. Note: If

the CTRL key is not held down, the data will be moved and not copied.

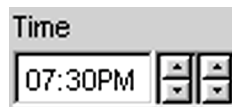


This process also works in reverse. Data can be “dragged” from an OPAS field into another program.

This process does not allow data to be copied to or from grids within OPAS.

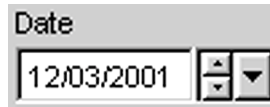
Entering Dates and Times

Time fields in OPAS appear as follows:



The top two arrows move up (that is, later) by the hour and minute. The lower two arrows move back (that is, earlier) by the hour and minute. Typing “10p” (without the quotes) and then pressing the TAB or Enter keys on the keyboard will enter a time of 10:00 PM. Likewise “9a” (without the quotes) will enter 9:00 AM

Date fields in OPAS appear as follows:



The top small arrow moves forward one day, the lower small arrow moves backward one day.

The large downward pointing arrow reveals the date selection window:

Double-clicking on any day will enter it into the date field (and close this window).

The drop-down fields at the top of the calendar can be used to select individual months and/or years.

The < and > buttons beneath the calendar move forward and back one month. The << and >> buttons move forward and back one year.

The **V** button enters today's date.



Keyboard Equivalents

The following keystrokes can be used in lieu of clicking the corresponding icon or menu item:

Esc - Closes any program area (or screen)

TAB - Move forward from one field on a screen to the next

SHIFT + TAB - Move from one field on a screen to the previous one (moves backward)

CTRL + HOME - Jump to the first record in a program area

CTRL + END - Jump to the last record in a program area

CTRL + PAGE UP - Move forward one record at a time

CTRL + PAGE DOWN - Move backward one record at a time

CTRL + Down Arrow - Add a new record to a Grid

CTRL + Up Arrow - Delete the selected (or top) line in a grid

CTRL + F - on List screens, opens the Find dialog window

CTRL + N - Create a new record

CTRL + S - Save a record

CTRL + D - Delete a record

CTRL + R - Restore any changes of an unsaved record

ALT(Release) + Underlined Letter - Activate the OPAS menu

ALT(Hold) + Underlined Letter - jump to that screen within a program area

F4 - Generate a Report

F5 - Advanced Search

F6 - Basic Search

F7 - Basic Filter

F8 - Execute a Basic Search

F9 - Clear any filter(s) and show all records

F10 - Refresh the screen

F11 - Data Relations

Right-click Mouse - view/go to related program areas

Getting Started with OPAS

There is no one “right way” to use OPAS, nor one set sequence of steps that must be followed when setting up the software. This is due simply to the fact that each orchestra may have pre-existing data converted into an OPAS database, have purchased the OLIS database, or any number of other configurations.

This outline suggests the recommended way to populate an OPAS database, and to begin using the software. Fine Arts Management provides a service whereby your OPAS database can be set up and populated for you - contact our company for further details.

Creating a basic concert season

1. Set up Production Background Information

Creating the proper background data first will make the creation of concerts and other activities faster and more accurate

- a. Create Seasons - Choose the Background Data 1 | Seasons... menu item and create the current and next three or four seasons for your orchestra. Give each a Name (“2002-03 Season”), Code (“02-03”) and Start/End Date. (More information: Page XXX)
- b. Create Projects - Choose the Main Data | Projects menu item and create at least the basic projects used by your orchestra. For example: Subscription Week 1, Subscription Week 2, Pops Set 1, etc. Make a Project for “Administration” for all activities (such as meetings and auditions). (More information: Page XXX)
- c. Create Activities - Choose the Background Data 1 | Activities menu item and create the basic activities or events that define your organization. Examples are: Concert, Rehearsal, Run-out, Audition, Free Day, Educational Concert, Outdoor Concert, Dress Rehearsal, Open Rehearsal, Recording Session, etc. Make sure each has a color assigned to it, is indicated as a performance where applicable, and has the proper number of Services associated with it. (More information: Page XXX)

These three critical fields will indicate the way in which the OPAS software will organize your orchestra's activities

- d. Create Venues - In the OPAS Address-Book, create the main venues used by your organization. Remember to make each belong to the Address Group "Venue". (More information: Chapter 8)
- e. Create the Orchestra / Conductor / Soloists - In the Artists program area, create your orchestra (and Pops/Chamber/Opera orchestra and other ensembles), assigning each to the Address Group "Orchestra". Create as well your Music Director, and other conductors and soloists used by your orchestra, particularly in the current season. Remember to make each soloist belong to the Address Group "Soloist" and to assign the proper instrument(s). (More information: Chapter 4)

These two steps will ensure that the proper personnel are in place to build a concert season, and data entry will be quicker.

2. Set up Composers and Compositions

If the OPAS database in use by your organization does not have any Composers or Works, create as many of each as are required for the current concert season.

- a. Create Composers - choose the Main Data | Composers menu item. Create as many composers as are required for your current concert season. Remember to create composers such as: TBD, Anonymous, etc. to cover unknown works. Also create a composer with the last name "Intermission" and no first name - intermissions will be associated with this composer so that they can become part of concert programs. (More information: Chapter 5)
- b. Create String forces - choose the Background Data 1 | Strings menu item. Create the basic string forces or complements used by your orchestra. This will make setting up compositions easier and will ensure proper musician counts when creating programs. (More information: Page XXX)

- c. Create Works - chose the Main Data | Works menu item. Create the compositions used in the current season, associating each work with the composers that have been created. For each composition, be sure to strictly adhere to consistency with the Title 1 of each work - it is this Title that will be most often used in searches. Title 2 will be the title as it appears on programs and reports (see Page XXX). The creation of individual movements and timings is strongly recommended, but at the very least indicate the timing of the work so that program timings are complete and accurate.
- d. Fill in the instrumentation for each work, using the string forces created in the previous step to obtain a full and complete musician count for each work. (More information: Chapter 5)

3. Build a concert season

The previous two steps will make it easier to build complete and accurate concerts and rehearsals.

Choose the Main Data | Dates | Dates menu item. Click the New button to create a new concert program. Choose a performance date in your current concert season, and on the Main screen indicate:

- The Project
- The Season
- The Activity Name
- The Date/Start/End Time
- The Venue
- The Conductor
- The Orchestra

Click the Save button to save this data, and move to the Program screen. On the Program screen, indicate the:

- Concert title, if there is one

- Works on the program. Click the green "+" key and add the individual works on the program, including Intermission(s)

- Soloists for works. Select the composition in the Program grid for

which there are soloist(s). Click the green "+" key on the soloists grid to assign artists to the work.

Click the Save button to save this concert program.

Additional data can now be added such as Dress Code, information on the Additional Data screen (see page XXX for information regarding the Additional Data screen), Series, etc.

Use the Copy button at the lower portion of the screen to build the rehearsals and other performances of this program. When copying a concert to create a rehearsal, remember to:

- Change the Activity to "Rehearsal", "Dress Rehearsal" or whatever the case may be

- Change the start and end time

- Remove the Intermission, and place the works on the program in rehearsal order

Steps one through three will put into place the fundamentals of a concert season.

From this foundation, additional program areas of OPAS will be incorporated, based upon the specific needs of the orchestra. This process is an organic result of simply using the software, and in introducing it to other administrative areas of the organization. This natural development is meant to be undertaken with the active involvement of Fine Arts Management. The appropriate guidance, advice, training (where necessary), new reports and data analysis tools, and other services will make this a more beneficial and efficient process, and maximize the effectiveness of the software.

Some areas to initially explore include:

Additional Activities

In addition to the main concert season, the organization's schedule can be filled out with educational activities, auditions, chamber music concerts, pops concerts, etc.

Each of these activity areas will require distinct Projects and possibly related background information such as Activities, Series, Artists, etc.

Library Functions

The scores and parts owned by the organization can be recorded in the Library program area, and score rental contracts can be assigned to performances.

To create Library scores:

- Ensure the publisher and publishing agent of the composition appear in the Address Book area of OPAS (Chapter 8)

- In the Publications program area, assign the appropriate publisher(s) to the work (Chapter 6)

- In the Library area, record this score, and indicate the appropriate purchase, marking and materials information

To create Score Rental Contracts

- Ensure the publisher and publishing agent of the composition appear in the Address Book area of OPAS (Chapter 8)

- In the Publications program area, assign the appropriate publisher(s) to the work (Chapter 6)

- In the Expense Types area, create the necessary expense types or costs associated with score rentals - for example: rental fee, shipping, and tax.

- In the Rentals program area, record the score and publisher, the performance(s) for which the score is required, and the logistics of the rental dates/cost.

Production information

Production data can be created and tracked using the To-Do List features of OPAS. Create To-Do List templates and items as described in Chapter 9, and assign these items to concerts. The To-Do List area will provide an overview of all tasks for a particular Project, date range, staff member, etc.

Artist Contracts

Artist performance contracts and itineraries can be created, and a contract log can keep track of contract statuses.

Create the proper contract groups in the Background Data 2 | Contract Types program area

Ensure that the artist managers or representatives for the artist(s) appear in the Address Book area of OPAS (Chapter 8)

In the Expense Types area, create the necessary expense types or costs associated with contracts - for example: performance fees, transportation, lodging, etc (see Chapter 11 for more information).

In the Contracts area, build a contract for the artist, conductor or chorus, indicating the Agent, Contract group, and rehearsals/performances covered by the contract. The Expenses grid on the Accounting screen is used to enter the financial details of the contract. The Schedule screen will contain travel/meeting/social and other activities, and will be used to create the Artist's itinerary.

The To-Do List features of OPAS can be used to create a contract log. Create To-Do List templates and items as described in Chapter 9, and assign these items to artist contracts. The To-Do List area will provide an overview of contract status(es) for a particular Project, date range, agency, etc.

General Expenses

Cost items and expenses for activities can be assigned. In the Expense Types area, create the necessary expense types or costs associated with orchestral activities (see Chapter 11 for more information). Create the cost items themselves in either the appropriate program area(s) of OPAS, in the Expense Combinations area, or in the Expenses area itself (see Chapter 11 for more information). Budget figures can also be entered in the Expense Type, Project and Activities program areas

Personnel Attendance

With OPAS Extended, attendance for orchestra and ensemble personnel can be recorded for all activities. Review Chapter 15 for

specific instructions regarding these OPAS functions.

Ensure orchestra or ensemble members have been created in the Artists area of OPAS and that the proper instruments have been assigned. If you wish OPAS screens and reports to show musicians in seat order, place the chair/stand in the Order 1 field for the artist

Ensure that "Presence Types" have been created

In the Service Attendance area of OPAS, select the orchestra Section, Season, and Project or Week. Click the Refresh button at the bottom of the screen, and assign musicians to activities.

To assign/remove musicians from specific works on a program, click the right-pointing arrow in the column heading for the activity, and remove the musician from the specific work(s).

Musician assignments can be reviewed and edited in the Services area of OPAS.

Schedules for specific orchestra members and general instrumentation schedules can be generated in the Services area and Dates area, respectively.

Personnel Payroll

With OPAS Extended, payroll for orchestra and ensemble personnel can be calculated and analyzed. Review Chapter 16 for specific instructions regarding these OPAS functions.

To create payroll:

Ensure that the musicians have been assigned to activities as described in Chapter 15

In the Expense Types area, create the necessary expense types or costs associated with payroll (see Chapter 11 for more information).

In the Services area, run the payroll calculation reports/functions to calculate payroll amounts for any combination of musicians/date/Projects, etc.

Chapter

24

Chapter 24 Technical Information

Overview

This chapter provides an introduction to the various technical aspects of the program, User customizations, and creating OPAS Users.

Installation Issues

OPAS can be installed from any workstation on the network. Full installations of OPAS (Setup.exe) will:

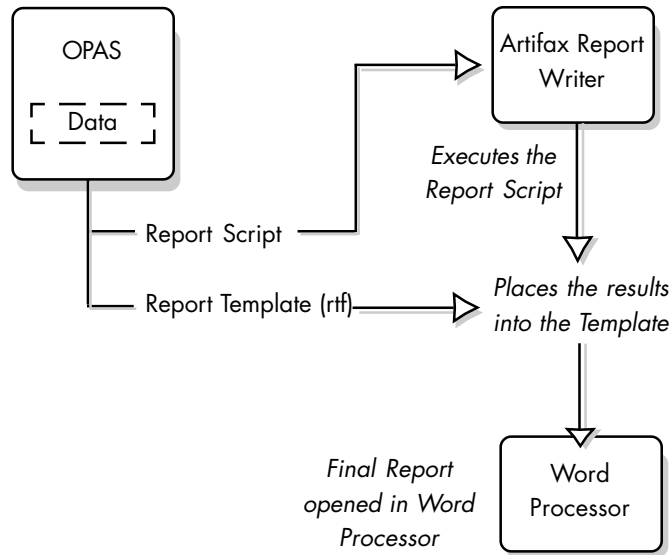
- Place the OPAS executable (OPAS.exe) and all other support and program files on the target drive (the server)
- Place all necessary Windows support files on the workstation from which the install originated
- Place an OPAS icon pointing to OPAS.exe on the target drive

A “Workstation only” installation of OPAS (see Chapter 1 for the installation option screen shot that indicates a workstation-only install) makes no changes to the server or main installation of OPAS. It only places all necessary Windows support files on the workstation from which setup is run, and places an OPAS icon pointing to OPAS.exe on the target drive

When installing OPAS on a Windows2000 computer, it is strongly recommended that you do so in Administrator mode. Failure to do so will result in critical support files not being written to the C:\Windows\System folder of the PC from which setup.exe is run. OPAS itself need not be run in Administrator mode, but the installation must be.

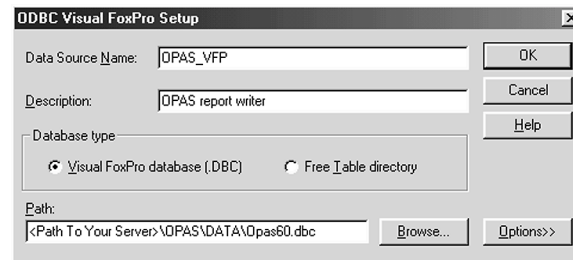
Artifax Report Writer

OPAS outputs reports to Microsoft Word through the use of the Artifax Report Writer. The Artifax Report Writer executes a series of nested SQL statements on the OPAS database, and stores the results as aliases. The report template (in rich text format) is then opened in Word, and the aliases are placed into bookmarks.



Before OPAS can communicate with the Artifax Report Writer, an ODBC connection between the report writer and OPAS must be established. This procedure must be carried out on each individual workstation that wishes to generate Word reports.

1. From the desktop, launch the Control Panel. (Start | Settings | Control Panel)
2. In Control Panel, double-click on the 32bitODBC Icon (on some computers, this might read "ODBC Data Sources (32bit)"; and on Win2000 machines the ODBC icon is in the Administrative Tools group).
3. On the next screen, click the **System DSN** tab (the second one from the left). At the System DSN screen, click Add. Fill out the



next window as shown here - note that the Path will be the path to the

main OPAS database, either on your hard drive, or on the Server (that is, it will not be: "<Path to Your Server>". Use the Browse button to locate the database.

4. Click OK and then OK again to exit the 32bit ODBC Setup.



NOTE: If a User receives an "Active X component" error when generating Word reports, then the problem is not with the ODBC connection, but with a missing Active X component. This can quickly be solved by running the Artifax Report Writer setup (ARSetup.exe), provided on the OPAS CD-ROM. When installing the report writer (ARSetup.exe), the target directory should be that of OPAS - install to the directory in which OPAS.EXE resides. This will ensure that all report paths are consistent and accurate, and the proper support files are installed.

WAN vs LAN

OPAS was not designed to run over a Wide Area Network (WAN). It was specifically designed to run only over a Local Area Network (LAN).

If remote access to OPAS is required, Fine Arts Management recommends the use of Terminal Server on a Windows 2000 server. Contact Fine Arts Management for more information.

License File

The OPAS license file is OPAS.LIC. It must reside in the same directory as OPAS.exe.

SQL Server

OPAS has been optimized to run under SQL Server 7.0 or SQL Server 2000. There is no additional OPAS license fee nor additional technical support fee to operate OPAS in a SQL-Server environment. However, it is advised that the following be kept in mind:

1. Customized OPAS reports may have to be upgraded from FoxPro format to SQL-Server format which can, in some cases, incur a charge
2. Fine Arts Management does not sell nor support SQL-Server. It is assumed that an orchestra running OPAS in a SQL-Server environment owns SQL-Server, the necessary site licenses, and has the ability to maintain SQL-Server itself.

Upsizing/Creating OPAS in SQL Server

Instructions for upsizing OPAS to SQL-Server follow here. These steps will create a new, empty OPAS database in SQL-Server format. That database is then populated with the contents of an existing FoxPro OPAS database. All files required for these steps are supplied either with SQL Server Enterprise Manager, or are installed with OPAS.

1. Create a new database called 'OPAS' using the SQL-Server Enterprise Manager. Unless there is compelling reason to do otherwise, store it in the Enterprise Manager default location.
2. In the OPAS directory on the server, there is an OPAS\ODBC\MSSQL directory. All scripts for OPAS database creation and updates are stored in this folder on the server. They should not be copied to local workstations.

Still in Enterprise Manager, open the script

```
CREATE_OPAS_<version no.>_MSSQL.SQL
```

in Query Analyzer and run the script. For OPAS version 7.06 (for example), the script name is:

```
CREATE_OPAS_706_MSSQL70.SQL
```

This process (step 2) will create a new, empty SQL Server database that complies with OPAS version 6.05. Ensure that every user has the rights to execute the stored procedures 'udf_NewID' and 'udf_GetDataVersion' in the database that was just created.



Note: so that future and comprehensive updates of OPAS can be done from the same setup or update executable files, all update and database creation scripts are intentionally kept in this ODBC\MSSQL directory. There are many scripts here that you do not, nor will not, need.

Enterprise Manager can now be closed.

3. Still from the Server, create a new ODBC connection to the new SQL Server database. Make a SQL Server 7.0 connection with these properties:

System DSN Screens

Name: OPAS (the name assigned to the database in step one)

Connect to SQL server <name of the server>

Select **SQL Server** Authentication

Login: sa

Change the **default** database to OPAS

All other settings can be left at their default values

Test and save this ODBC Connection

4. From Windows Explorer, run (double-click on) this file in the OPAS\ODBC folder:

Export2CS.exe

This routine will export data from a Visual FoxPro database (either an empty one, or a pre-existing OPAS database) to a Client-Server database.

The first screen will prompt you for the Datasource. Select OPAS - the database created in step one (the choices in the window will mirror those of the ODBC connections)

The second window will ask for the OPAS VFP (Visual Fox Pro) database to be exported. In a standard OPAS installation, this

will be OPAS60.DBC in the OPAS\Data folder on the server. If you are unsure of the location of the OPAS60.dbc file, contact Fine Arts Management.

5. Make the following changes to OPAS.ini on the Server (that is, the ini file in the same directory as OPAS.exe):

[Path]

DataPath=ODBC

.

. leave all other entries as they are

.

[data]

datasource=MSSQL

dbc=OPAS60_MSSQL

odbc_connection=<name of the ODBC connection from step 3>

.

. leave all other entries as they are

6. Finally, every workstation that uses OPAS needs an ODBC connection identical to the one created in step 3, and with the same name.

OPAS Folders and Contents

A standard OPAS installation has the following directories. Note that these folders and directories are only placed in the same location as OPAS.exe (the main executable). That is, in a standard network environment, these folders will appear only on the server.

- Data - the main data folder for the OPAS database
- Data_Demo (optional) - this folder contains only the OPAS demonstration database
- Document - external digital files that are linked to the OPAS database are stored here. See Chapter 19 for more information
- ODBC - all scripts and utilities used to create an OPAS SQL-Server database
- Program - all built-in OPAS functions and other customized automatic routines. See page XXX for more information regarding Functions
- Report - all OPAS reports that are generated using the "built-in" method - see Chapter 22 for more information
- Report_Art - all scripts and templates for OPAS reports that use the "Word" method - see above in Chapter 22 for more information.
- Report_Customized - a reserved folder used for specialized or custom reports. This folder is not used unless specifically indicated by Fine Arts Management
- Report_Art_Customized - a reserved folder used for specialized or custom reports. This folder is not used unless specifically indicated by Fine Arts Management
- System - this folder holds all program strings, font settings and other user-definable attributes
- UserData - These files hold the definition/permissions for each OPAS User. See page XXX of this chapter for more information on setting User permission

Key OPAS files

ArtRep.exe - the Artifax Report Writer

OPAS.exe - the OPAS executable

OPAS.ini - the main OPAS ini file

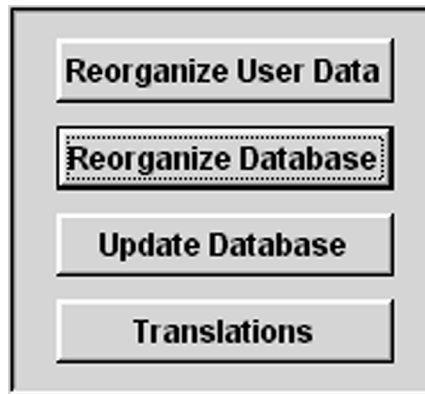
OPAS.lic - the OPAS license file

OPASTools.exe - the OPAS Utilities executable (see below for more information)

Orchestra.bmp - the bitmap file used in OPAS built-in reports

OPAS Tools

OPAS uses a built-in set of utilities to maintain and update system files. To open OPAS Tools, chose the Start | Programs | OPAS 7.0 | OPAS Tools menu item from your computer



Reorganize User

Data - This utility cleans up user settings in the OPAS\UserData folder. It permanently deletes Users that have been deleted within OPAS, and reorganizes the User database for maximum efficiency. It need only be run if there has been recent creation, modification or

deletion of OPAS User (see "Creating Users" below)

Reorganize Database - FoxPro Only. This utility permanently deletes fields marked for deletion within the database, and reorganizes/shrinks the database for maximum efficiency. This utility can be run once a week to ensure the best OPAS performance. This utility is not used in a SQL-Server environment

Update Database - FoxPro Only. This utility is used to update an

OPAS database structure so that the database conforms with a program update. On occasion, features will be added to OPAS that require either a change in existing database fields, or the addition of new database fields. This utility affects those changes without altering the data itself in any way. Do not run this Utility unless specifically instructed to do so by Fine Arts Management. This utility is not used in a SQL-Server environment - in SQL Server, scripts are instead run in Query Analyzer

Translations - This utility is used to translate OPAS program strings. See "Translating OPAS" below.

Customizing OPAS

OPAS allows for user customization in several areas. Some of these adaptations are purely cosmetic and others are functional.

Toolbar

The standard Windows toolbar that provides access to OPAS program areas can be customized to display icons (shown at right) or text (shown on the following page).

When the OPAS toolbar is in "text" mode, the program areas that appear on the toolbar can be specified.

To edit the tool bar, select the System | Edit Toolbar.. menu item. This will display the Toolbar Settings window. The Toolbar Settings window is divided into two sections:

General Options - This screen controls the look of the toolbar. At the top of the screen, choose either "Standard OPAS" (the default or original Toolbar, using icons) or "User Defined" (using text). When in text mode the toolbar width can be adjusted at the bottom of the screen.



Buttons - this window displays each distinct program area of OPAS that can be represented on the Toolbar (again, only if the Toolbar is in Text Mode). To add a program area, select it in the Toolbar Settings window, and drag it to the toolbar - the toolbar will be outlined in red. When you release the mouse, a new button will be added to the Toolbar, and that button will open the respective program area. Buttons will appear in the order in which they are dragged to the toolbar, but can be re-ordered within the toolbar by dragging and dropping.



Other Notes regarding the Toolbar:

- Toolbar settings are User-Defined. The settings are linked to your User Name and password
- Toolbar settings do not supercede User Rights. For example, if a User does not have access to the Artist Accounting section of OPAS, then a Toolbar button assigned to Artist Accountings will have no effect when clicked. See this section for more information on Users and User Rights.
- The Toolbar can be placed on either the right side of the computer screen (the default location) or along the top of the computer screen. To move the Toolbar, click on the border and drag it up to the top, then release the mouse button.

Fonts

The fonts used on OPAS screens can be changed to any that are installed on the local PC. To change screen fonts, click the System | Edit Preferences... menu item. This will open the Preferences window.

The top portion of the window is used to set the fonts that are used on all OPAS screens.

The top font, "Labels and Captions" is used on field labels, drop-down lists, standard fields and screen tabs.

The lower font, "Lists and Grids" is used for all grids such as the List screen in all program areas.

To change either font, click the Change... button and select the desired font from the standard Windows font interface.



Notes on Maximizing Windows

If you wish to maximize individual screens within OPAS, set the top font, "Labels and Captions" to a font size of 6 or 7 (depending on the font itself); this will optimize viewing when the screen is maximized. The "List and Grid" font can remain at 7 - 9 point. As many Windows fonts will not allow a selection below an 8-point font, simply highlight the number 8 and type in a 6 or 7.

The OPAS.ini file

Several other system and display settings are made through the OPAS.ini file. This section of the document outlines OPAS.ini settings. Note: Do Not make any changes to the OPAS.ini file unless specifically instructed by Fine Arts Management.

[Path]

This section holds data, program and system path settings

[ArtifaxReports]

This section holds the report path and ODBC settings for the Artifax Report Writer

[Data]

This section stores information on the type of database used and SQL-Server ODBC connection data if required.

[toolbar]

[set]

With the exception of the items listed below, leave all settings in this section as they are.

collate=MACHINE or GENERAL

*** The MACHINE setting causes OPAS to take case into account when sorting drop-down lists. GENERAL means that OPAS ignores case ***

fontbold=OFF - *** this is the recommended setting and refers to the font within grids* **

; mdy: mm/dd/yyyy oder dmy: tt.mm.jjjj

date=MDY - *** this is the recommended, U.S. format. DMY is the European date format ***

; 12: hh:mmAM oder 24: hh:mm

hours=12 - *** a setting of "24" will place OPAS on a 24-hour clock ***

; 1; sunday, 2: monday

FirstDayOfWeek=2

; 1: first week contains 1.january

; 2: 4 days belong to current year

; 3: the first week has 7 days

FirstWeek=2

; standard-login

;User_Name=SYSTEM

;User_Password=SYSTEM

User_Name=DEMO

User_Password=DEMO

*** These setting can be modified to store User Names and Passwords locally ***

[ShowRoom]

This section is used only when employing the interface to Artifax Event (see below for more information)

[desktop]

MaximizeForms=OFF

*** This is the default and recommended setting. To maximize all windows within OPAS, be sure to adjust the display font so that field labels and contents can be read. ***

;default or usa

;AddressType=default

AddressType=usa

Multiple ini files/databases

It is possible to operate OPAS using two or more distinct databases. While not advisable for most situations, separate databases can be helpful in instances where OPAS is used to manage both an orchestra and a chorus, or an orchestra and a pops orchestra with dramatically different repertoire and personnel requirements.

There is no additional license fee for configuring OPAS with multiple databases, but the process will require consultation with Fine Arts Management, and may involve customization of some settings. Please contact Fine Arts Management for more information.

User Rights / Creating Users

OPAS allows different user profiles with different levels of access to the program. Creating Users requires a working familiarity with OPAS and its different sections.

From the Main Screen in OPAS, choose the "System | User Rights | Rights menu item along the top of the screen.

The user rights interface in OPAS is based upon the grid shown on the following page. A green box or cell indicates that the User has permission to that program area, and a red box indicates that the User does not have permission. Colors are changed within each box simply by clicking on it.

Name DEMO		Code DEM		Change Password	
Language US english		Import Rights			
Type	Object	Read	Change	Delete	Append
Window	Absence Types				
Window	Activities				
Window	Activities/Budgets				
Window	Activities/Dates				
Window	Activity Groups				
Window	Address Groups				
Window	Address Book				
Window	Addresses/Agents				
Window	Addresses/Contact Persons				
Window	Addresses/Contacts				
Window	Addresses/Functions				
Window	Addresses/Groups				
Window	Addresses/Instruments				
Window	Addresses/Numbers				

The four columns within each program area indicate the User's level of permission:

- **Read** - the User can/can't see data in the program area
- **Change** - the User can/can't edit data in the program area
- **Delete** - the User can/can't delete data in the program area
- **Append** - the User can/can't create data in the program area

OPAS grants access to the program based on program areas, and/or the SubForms or Grids within program areas. OPAS does not grant access rights to any individual field within a program area or grid

Creating a new OPAS User

To create a new User, click the New icon in the lower right corner of the screen. Give the User a Name (of any length) a Code (initials), and indicate the language in which this User will operate OPAS.

Then click the appropriate cells to modify the User's read, write, delete and edit abilities.

When the Save button is clicked, a Password will automatically be assigned to the User. In OPAS, **the default Password is the same as the User Name**. Passwords can be altered after they have been created. Default Passwords are created using the first 10 characters of the User Name (if applicable). Note that the Password

inserts an underscore (_) for a space. It's important that this underscore is typed when entering the password:

For example

User Name = Robert Smith

Default Password = Robert_Smi

Importing User Rights

User rights can be created by copying those rights from a pre-existing user. To do this, create a User and Accept the Default Password by clicking OK. Then click the "Import Rights" button. This screen will open, showing the list of existing users in your OPAS system: Choose the User whose rights should be copied and press the Green OK button.

Storing UserNames Locally (Local .ini Files)

By default OPAS does not locally store User Names and Passwords; each User must type his/her name and password upon starting the program. However, OPAS can automatically create a separate ini file on each local workstation, in that workstation's C:\Windows folder.

These two separate .ini files make it possible to store User Names locally so Users do not have to re-type their name each time OPAS starts. Passwords must still be typed.

This feature is all-inclusive, meaning that if it is set for one OPAS User, it will be set for all.

To enable this feature, first modify the main OPAS.ini file (the OPAS.INI file that resides in the same directory (presumably on the server) as OPAS.exe) by double-clicking on it. This will open the ini file in Notepad.

Scroll down the file to the [set] section. It contains has User Name Password information as follows:

```
; standard-login
;User_Name=SYSTEM
;User_Password=SYSTEM
User_Name=DEMO
User_Password=DEMO
```

Simply place a semi-colon in front of the "User_Name=DEMO" and "User_Password=DEMO" lines as follows:

```
; standard-login
;User_Name=SYSTEM
;User_Password=SYSTEM
;User_Name=DEMO
;User_Password=DEMO
```

Save this file, and exit Notepad.

This will "deactivate" these two lines. The next time OPAS is started, it will bypass the User information from the Main .ini file and then look for a local .ini file for the User information. The first time this happens, it will find the local .ini file empty and the User Name/Password will need to be typed in to the appropriate fields. Thereafter, however, the User Name will be retained.

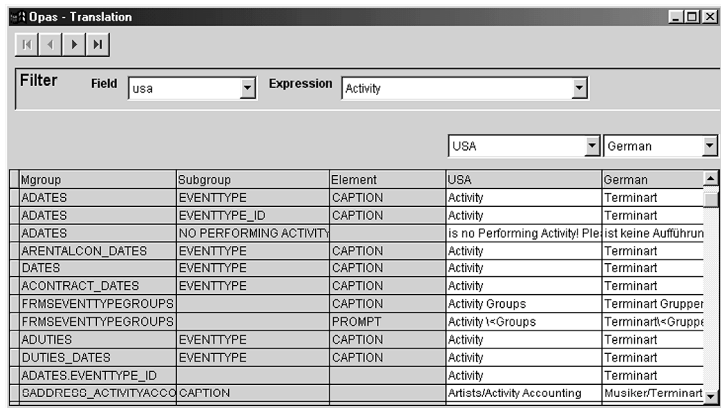
Translating OPAS

OPAS Users can employ different languages within the program. OPAS program strings are translated into, or modified within, different languages, and languages are assigned to Users when the User is create (see the previous section). Translating OPAS strings requires a working familiarity with OPAS and its different sections

It is recommended that you do not attempt to translate OPAS without first having a full backup of your OPAS system, or at the very least,

the OPAS\System folder.

Start the OPAS Tools utility (as described on page XXX above). Click the bottom button, "Translations" to launch the translation utility:



The left language will indicate the default language in which OPAS operates (U.S English). The right drop-down field will contain a list of available languages. Indicate the desired language, and type a translation of the Field Caption next to the U.S. English version.

Mgroup stands for Main Group and is the program area being changed

SubGroup is the area of the screen or the field name being changed

Element is the actual aspect of the program being. In most cases this will say **Caption**, as captions for the Field Names are being changed.

Translating selected field names or program area names
To modify or change the name of only selected program area names:

1. in the top left drop-down field (labeled "Field") select USA
2. This will cause the contents of the "Expression" field to change. Click the drop-down menu and select the OPAS field name or

program expression to be changed

3. Click the USA drop-down field on the top of the left column (the right column is not used for this operation)
4. Type the new expression or field name in the left USA column

Artifax Event Interface

OPAS can interface with the Artifax Event venue management software. Artifax Event is a stand-alone product, created by Artifax Software Limited (www.artifaxsoftware.com) and distributed in North America by Alliance Software (<http://www.alliance-software.com/>).

With the Artifax Event interface enabled, scheduling information from OPAS is sent to Artifax Event. Users of Artifax Event are assumed to be the managers and directors of the orchestra's concert spaces. The orchestra's schedule is confirmed, or if required, modified. These confirmations and are then reflected back in OPAS.

This document will outline the steps necessary in OPAS to enable the interface. Contact your Artifax Event technical support representative regarding the activation and use of the interface in Event.

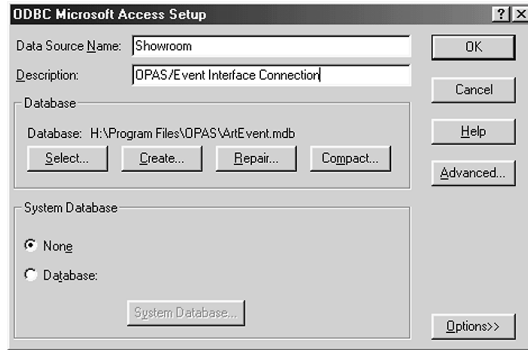
Step one - modify the OPAS.INIfile

In the OPAS.ini file, change the "Showroom" section to read as follows:

```
[ShowRoom]
Set=ON
CustomerNo=1
```

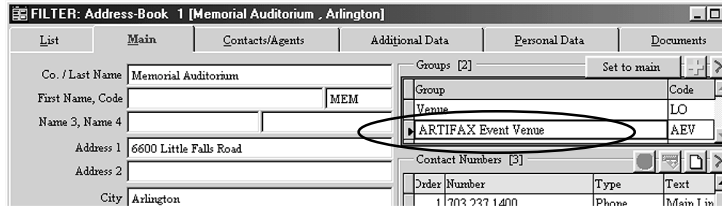
Step two - establish the ODBC connection to the Artifax Event database

The type and location of the Artifax Event database (Access, SQL-Server, MSDE) will dictate the ODBC connection used. For a standard Artifax Event installation, the ODBC System DSN will be a standard Access ODBC connection:



Step three - assign Artifax Event venues in OPAS

In OPAS, the Address Group “Artifax Event Venue” has special properties in that only activities assigned to these venues will be available in the interface (see the next section). While a venue can be of many types, at least one of those types must be “Artifax Event Venue” in order for the interface to properly function.



Step four - activate the interface

OPAS activities are first sent to Artifax Event. To open the Artifax Event area, choose the Main Data | Dates | Artifax Event menu item. Note that this menu option only appears if the OPAS.INI file modification described above has been made.

The Artifax Room Booking program area is divided into three screens or sections:

- **List** - a list of all activities that occur in Artifax Event Venues
- **Main** - this screen is used to send OPAS room requests to Artifax Event and to view the results

- Documents - links to external digital files related a chosen room request

As with other areas of OPAS, the Room Booking area opens in the “Basic Search” or “Green Screen” search mode. To learn more about this search mode, see Chapter 21.

List Screen

The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire area’s contents.

The columns on the screen can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column. The List tab sorts by Date as a default.)

See Chapter 20 for more information on working with grids such as those on the List screen. The List screen is used extensively to execute Searches and Filters. See Chpater 20 for more information on searches and filters.

Main Screen

Artifax Event room requests are made on the Main screen.

The top and bottom portions of the screen contain data from the OPAS Dates program area (see Chapter 3). These fields are tinted in yellow, indicating that they cannot be modified.

In the middle of the screen, surrounded by a color border, is the room request area.

Indicate the Start and End time for the active record. In many cases, this may be the start and end time of the activity as it appears in OPAS. However, the space request may also be for significantly before or after the OPAS activity time to allow for set-up, tear-down, or other venue-specific needs.

Choose the room for which the request is made. The rooms in this drop-down list will be those spaces created in the Artifax Event software program.

Finally, click the **Request Room** button, and the room request and OPAS activity will be registered in Artifax Event.

The room request between OPAS and Artifax Event has 4 different states. Each state is identified by the color of the border in the middle of the Main screen, and the color of the "Status" column on the List screen:

- **Yellow** - indicates a request has not yet been made
- **Teal** - indicates a request is pending
- **Red** - indicates the request has been modified or refused
- **Green** - indicates the request has been accepted or confirmed

If the room request is sent "back" from Artifax Event with changes, those changes will appear on the right side of the Main screen. Click the Accept Changes button to accept the changes as indi-

cated, and to update the OPAS database.

Click the Close button or press the "Esc" key on the keyboard to exit the Room Booking program area.

Documents screen

The Documents screen is used to link external digital files to a particular room request in the OPAS database. See Chapter 19 for more information.

Glossary of Terms

Glossary of OPAS Terms

A

Account Number

OPAS allows for account numbers, or general ledger numbers, to be assigned to a variety of different fields and expenses. In this way, reports and data analysis can be generated that matches the accounting system already in place at your orchestra. Account numbers can be combined from different program areas on printed reports; for example, the account number for a Project and for an Expense type can be combined into one number.

Account numbers are alphanumeric and are usually between 10 and 20 characters long.

"Amounts" or "Fixed Costs"

Amount items or Fixed Costs are associated with Expense Types. If an Expense Type is always the same number, then a fixed Amount can be assigned to it. When the Expense Type is then assigned in OPAS, so to is the fixed amount.

Fixed Amounts are most often associated with orchestra personnel pay rates - for example, musicians receive \$150 for each activity. However, they can be assigned to any regularly repeating or set cost item such as hall rental or piano tuning. There is no inherent meaning in a fixed amount over one that is manually typed in OPAS.

Amounts in OPAS are created in the Background Data 2 | Amounts program area:

Name	Core Player Service Fee			Code	BP
Account No.	225SAL-002				
Amounts [2]					
Valid from	Amount Cat. 1	Percent Cat. 1	Amount Cat. 2	Percent Cat. 2	
10/01/2002	\$ 201.75	0.00	\$ 195.00	0.00	
10/01/2001	\$ 198.50	0.00	\$ 185.00	0.00	

Each fixed Amount has a Name, Code (optional), Account Number (optional), color code (optional) and Notes (optional).

The dollar amount itself is stored in the main grid in the center of the window. Click the green "+" key at the top right of the grid to add a new fixed cost.

Each Amount consists of two components - the date from which the amount is valid, and the amount itself. The date parameter makes it possible to have fixed amounts be Season or Year-specific, and automatically creates a history of the fixed cost. An Amount is valid until a new Amount and subsequent date is created.

Valid from 10/01/2002 Tu	
Amount Cat. 1	\$ 201.75
Amount Cat. 2	\$ 195.00
Amount Cat. 3	\$ 0.00
Amount Cat. 4	\$ 0.00

The dollar amount itself is stored in the "Amount Cat. 1" field.

If the Amount is associated with an orchestra personnel pay rate, the Amount can actually be one of nine different dollar amounts, stored in any of the Amount Cat. 1 through Amount Cat. 9 fields.

OPAS then looks to the Account Category assigned to an Artist (stored on both the Artist's Personal Data screen and in the Artist Accounting Main screen), and matches the fixed amount to the musician's account category.

Assigning fixed Amounts - Whenever an Expense Type is assigned in OPAS, the option exists to also assign a fixed Amount. The Amount field is always optional.

When the Amount field is empty, dollar amounts for the Expense Type will be manually typed.

The screenshot shows the 'Activities 1 (Concert)' window. The 'Expense Type' is 'Personnel: Core Player Fee'. The 'Amount' field is 'Core Player Service Fee'. A red oval highlights the 'Amount' field.

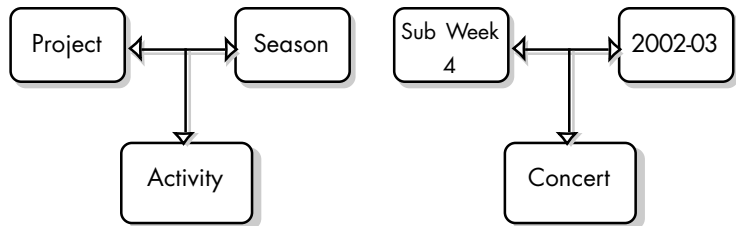
Active Record

“Active Record” is a database term used throughout this manual to indicate “the database record that you, the user of the program, have selected, are currently looking at, or are currently creating or modifying.”

Activity

An Activity is any distinct happening or event. It is also referred to as a “Date” in OPAS. Activities can encompass performance and non-performance events, and even events that do not include the orchestra. Examples of Activities are: Concert, Rehearsal, Audition, Dress Rehearsal, Meeting, Travel, etc. Activities are used throughout OPAS, and comprise the contents of the Dates area (chapter 3).

In addition to its own name, each Activity in the Dates area should absolutely belong to a Project and a Season so that it will have reliable integrity in the OPAS database. When generating reports, performing searches, data exports and data analysis, OPAS uses the Project and Season as the main criteria for defining and grouping like or related activities.



It is also strongly recommended that each Activity in the OPAS Dates area have a Date, Start Time, End Time and Venue. If the activity does not have these items, it will be very difficult to find it and to maintain the integrity of an orchestra’s schedule.

Creating Activities - Activities (such as “Concert”) are created in the OPAS Activities area. Once created, they are assigned in the Dates area to build an orchestra schedule. From the main screen in OPAS, choose Background Data 1 | Activities...

The screenshot shows the 'Activities 1 [Concert]' form. It includes several fields and checkboxes:

- Group:** Performance (dropdown)
- Name:** Concert (text field)
- Name 2:** (empty text field)
- Code:** CON (text field)
- Abbreviation:** Con. (text field)
- Default Start:** 08:00PM (time picker)
- Default End:** 10:00PM (time picker)
- Svcs.:** 0.0 (numeric field)
- Performance:**
- Svcs.:**
- Write to Text:**
- Expense Type:** Personnel: Core Player Fee (dropdown)
- Amount:** Core Player Service Fee (dropdown)
- Account No.:** (empty text field)
- Notes:** (empty text area)
- Dates:**
- Add. Activities:**
- Scheduling:**
- Tours:**

Group - indicates the Activity Group to which this Activity belongs (see below). Optional field.

Name - the Name of this activity as is appears throughout OPAS and on printed schedules

Code - a short-hand abbreviation or code for this activity. The Code is used in many OPAS program functions such as assigning musicians to activities, so it is wise to ensure that each Activity has a unique and logical Code.

Abbreviation - an abbreviated name for this Activity. This abbreviation can appear on printed schedules and reports.

Color - the color in which this activity will appear in all OPAS List screens and on the OPAS Calendar

Default **Start** and **End** - the default time(s) for this activity. When creating a new Activity, OPAS will automatically assign these times, but they always be changed once the activity is scheduled.

Services (number) - the number of services this activity comprises. This figure is used exclusively in personnel attendance and payroll functions.

Performance - this Activity, regardless of its name or Activity Group, is considered a Performance. This "flag" can be used in filters or searches, and/or in the printing of schedules. Take, for example, an Activity called "Open Dress Rehearsal" which belongs to the Activity Group "Rehearsal." A check in the Performance box indicates that the Activity is considered a performance (the public is welcome to attend). Whenever a schedule prints only "performances," the Open Dress Rehearsal will be included.

Services (check box) - a check in this box indicates that the activity will appear in the Service Attendance area of OPAS (see Chapter 15). That is, it is an activity to which orchestra personnel and/or substitutes can be assigned.

Write to Text - a check in this box indicates that whenever this activity is created, the name of the activity will be copied to the Text field on the Main screen of the Dates area. The default for this feature is off.

Expense Type / Amount - these optional fields are used exclusively for Payroll purposes. If the orchestra pays a fixed amount for each distinct Activity, these fields can indicate that pay type and amount. See Chapter 16 for more information.

Account No. - an internal General Ledger or Account Number to which charges against the activity apply.

Notes - any descriptive notes regarding this Activity.

Dates / Tours/ Scheduling / Additional Activities - as with the Services check box above, checks in these boxes indicate that the activity will appear and be available in these areas of the software.

Add. Fields - this screen is used to create and configure the Additional Data fields that accompany this specific activity. See "Additional Data" in this glossary for more information, and examples.

Additional Data (Marketing) - this screen is used to create and configure the Additional Data fields that accompany the activity in the Marketing program area. See Chapter 10 for more information regarding the Marketing area, and this glossary for more information regarding Additional Data.

Budgets - this screen sets optional budget amounts for the activity within a given season. See Chapter 11 for more information.

Activity Groups

Each Activity in the Database can belong to an Activity Group. These groups help categorize and organize the events and activities of your orchestra. For example, activities called "Rehearsal", "Dress Rehearsal", "Sectional" and "String Rehearsal" could all be part of the Activity Group called "Rehearsals"

Creating an Activity Group - From the OPAS main screen, choose Background Data 1 and then Activity Groups. Click the New button on the Main screen to create a new Activity Group.

Additional Data

"Additional Data" screens are used throughout OPAS. They act as customized data screens and are used for information not already stored elsewhere in that program area.

Additional Data screens will remain blank until they have been configured for a particular data type. When a new activity, contract or entity is created, OPAS will then use the Additional Data fields created for that data type.

Additional Data screens can be configured for:

- **Activities** - each different type of orchestral activity or event can have its own set of Additional Data fields. These fields are created in the Activities program area.
- **Marketing Activities** - each different type of orchestral activity can have its own set of Additional Data fields in the Marketing program area. These fields are created in the Activities area.

- People, Businesses, Venues - each different type of Address Book and Artists entity can have its own set of Additional Data fields. These fields are created in the Address Group program area.
- Contracts - each type of artist contract can have its own set of Additional Data fields. These fields are created in the Contract Types program area.
- Travel Groups - each type of travel group for a Tour can have its own set of Additional Data fields. These fields are created in the Travel Group Types program area.

To create the Additional Data fields for a specific data type, choose the appropriate program area from the list above. This example will use Additional Data fields for the Dates program area, which are created in the Activities program area (Background Data 1 | Activities).

The Activities program area contains a list of different types of events or activities. Select one, and click the Add. Fields tab on the right to display this screen.

	Caption		show		Caption		show
ext 1	Sponsor	(C 40)	<input checked="" type="checkbox"/>	Number 1	Est. Attendance	(N 11,2)	<input checked="" type="checkbox"/>
ext 2		(C 40)	<input type="checkbox"/>	Number 2	Actual Attend.	(N 11,2)	<input checked="" type="checkbox"/>
ext 3		(C 40)	<input type="checkbox"/>	Number 3		(N 11,2)	<input type="checkbox"/>
ext 4		(C 40)	<input type="checkbox"/>	Number 4		(N 11,2)	<input type="checkbox"/>
ext 5		(C 40)	<input type="checkbox"/>	Number 5		(N 11,2)	<input type="checkbox"/>
ext 6		(C 80)	<input type="checkbox"/>	Date 1	Broadcast Date	(D)	<input checked="" type="checkbox"/>
ext 7		(C 80)	<input type="checkbox"/>	Date 2		(D)	<input type="checkbox"/>
ext 8		(C 80)	<input type="checkbox"/>	Date 3		(D)	<input type="checkbox"/>
ext 9		(C 80)	<input type="checkbox"/>	Date 4		(D)	<input type="checkbox"/>
ext 10		(C 80)	<input type="checkbox"/>	Date 5		(D)	<input type="checkbox"/>
mo 1	Promo. Copy	(M)	<input checked="" type="checkbox"/>	Logic 1	Recorded	(L)	<input checked="" type="checkbox"/>
mo 2	Production Notes	(M)	<input checked="" type="checkbox"/>	Logic 2	Broadcast	(L)	<input checked="" type="checkbox"/>
				Logic 3		(L)	<input type="checkbox"/>

This screen indicates the data fields that can be added to OPAS. This same screen is used to set the Additional Data screen in all OPAS program areas.

Text 1 through **Text 5** - These are text fields of up to 40 Characters in length (including spaces)

Text 6 through **Text 10** - These are text fields of up to 80 Characters in length (including spaces)

Memo 1 and **Memo 2** - These are two memo fields that will hold an unlimited amount of text

Number 1 through **Number 5** - These are number fields (up to 11 digits) and will always be stored in decimal format (so financial information can be recorded).

Date 1 through **Date 5** - These are date fields in the format mm/dd/yy

Logic 1 through **Logic 3** - Logic Fields are yes/no fields and will be represented by check boxes

The **Caption** is the label that will appear both on the OPAS screen and on any data export.

Show indicates whether or not the field will appear on the OPAS screen (this allows you to have unused fields not appear).

Click the Save button to save the set of Additional Data.

Once created, the Additional Data fields appear in the designated program area, associated with the designated database entity.

Notes regarding Additional Data - Information on the Additional Data screen can be used as criteria in searches and filters.

Information on the Additional Data screen can be output to printed reports and documents.

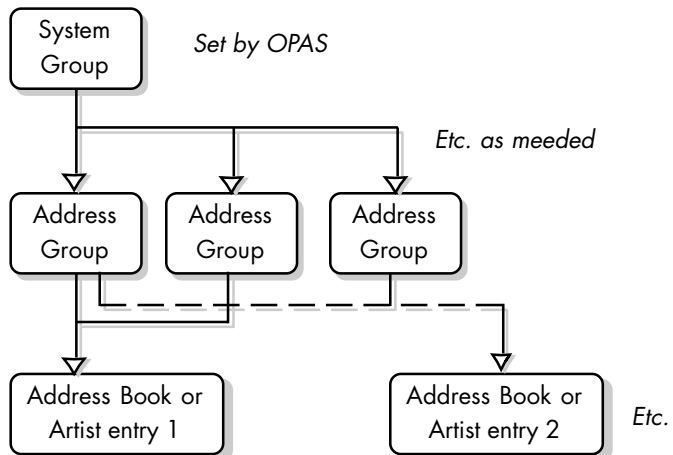
When used for entities (people, ensembles, businesses, etc.) the Additional Data tab displays the information that pertains to the entity's Main Group. See "Set to Main" elsewhere in this glossary.

Address Groups

The Address Group in OPAS indicates the classification to which an entity in OPAS belongs. Each entity - person, place, ensemble, business, etc - must belong to at least one Address Group, but can belong to more than one.

There can be as many or as few Address Groups as required by your orchestra and its operations. Each Address Group will in turn belong to System Groups, and the System Group to which it belongs dictates the function of the Address Group. For example, if an entity belongs to an Address Group that is in turn belongs to the System Group "Soloist", then that entity can be assigned as a soloist to any Activity.

System Groups are set within OPAS, and cannot be created, modified or deleted by the User.



System Group

(set by OPAS)

Examples of **Address Groups**

(created by OPAS Users)

Artifax Event Venue - used solely for the Artifax Event interface (see Chapter 24)

Artifax Event Venue

Agency - used both for artist managers, and for publisher agents

Artist Manager, Publishing Agent, Overseas Agency...

Choir - (choirs can be assigned as soloists to works and need not be Soloists in and of themselves)

Chorus, Mixed Chorus, Amateur Chorus, School Chorus...

Composer - used for living composers who will appear in the OPAS Address Book

Composer, Arranger, Librettist, Transcriber...

Conductor

Conductor, Music Director, Choral Conductor, Assistant Director, Director, Conductor Emeritus...

Location - used primarily to indicate "sites in which OPAS activities will take place"

Venue, Park, Concert Venue, Tour venue, School...

Orchestra - any orchestra or ensemble

Pops Orchestra, Chamber ensembles, Touring orchestras, educational ensembles...

Others - used for all other Address Groups that do not have a logical association with other System Groups.

Vendor, Musician Spouse, Board Member, Record company, Radio station, Service Organization...

Publisher - a Publisher of musical scores

Publisher, Distributor, Printer...

Requester - one who requests musical scores for perusal (see Chapter 6)

Your orchestra's librarian, music director, other organizations or personnel

Soloist - the generic term "soloist" is used for all artists who will be assigned to activities. Ensembles can also be soloists.

Soloist, String Quartet, Mixed Ensemble etc..

Staff - members of your orchestra or ensemble. This System Group is primarily used in OPAS Personnel functions. See Chapter 15

Orchestra Member, Orchestra Part-Time, Pops Orchestra, Retired Orch. Memeber

Substitute - substitutes for your orchestra or ensemble. This System Group is primarily used in OPAS Personnel functions. See Chapter 15

Substitute

Creating an Address Group - From the OPAS main screen, choose the Background Data 1 | Address Groups menu item. Click the New button on the Main screen to create a new Address Group. The Address Group must be assigned to a System Group, and can have an abbreviation stored in the Code field

Each Address Group can have its own set of Additional Data fields. These Additional Data fields are seen in the Address Book and Artists program areas. See this glossary for more information regarding "Additional Data."

Agent / Agency

"Agency" is a System Group in OPAS that is used both for performing artists and for compositions.

Entities of the Address Group called "Artist Manager" will belong to the System Group "Agency". These Artist Managers can then be associated with Artists - the Artist Manager serves as an Agency for the Artist.

Entities of the Address Group "Publishing Agent" will belong to the System Group "Agency". They can then be associated with music Publishers and music scores.

Alphanumeric

An alphanumeric field allows for both numbers and letters. Many "number" fields in OPAS (Account Numbers for example) are actually alphanumeric fields and allow for data such as 101A.

Artifax Event Venue

Artifax Event Venue is a reserved Address Group that is used exclusively to identify venues that will be used in the Artifax Event interface. See Chapter 24 for more information.

Artifax Report Writer

OPAS utilizes a Report Writer created by Artifax Software, Ltd. for the creation of Word reports. See Chapters 22 and 24 for more information.

B

Background Data

Background Data refers to the data that comprise drop-down lists and other look-up areas in OPAS.

OPAS separates background data into two menu lists:

- Background Data 1 - all background data used in main OPAS program areas
- Background Data 2 - background data specific to financial and payroll functions in OPAS Extended

Block / Triple Block

The "Block" and "Triple Block" are indicated by the "B" and "B3" fields at the top of the Main and Program screens of the Dates program area, the Scheduling program area, and in other related areas.

Used primarily by European orchestras, a "Block" is an arbitrary time period that provides another layer of detail for an orchestra's schedule. Blocks are primarily used for fiscal purposes and personnel contract period purposes.

A Block is a smaller, defined segment of an orchestra Season - for example, four-month periods. Each four-month period becomes a "Block". The "B" field in the Dates program area indicates the Block into which a given activity falls.

A "Triple Block" ("B3") is a set of three consecutive blocks, and is automatically calculated based upon the length of a Block.

To create the time period that defines a block, choose the Background Data 1 | Seasons menu item. On the Season screen, there is a field called "Period". Into this field, type the number of weeks that will comprise a single Block. A three-month Block, for example, will contain 12 weeks. Click the Save button.

Each Season can have a different configuration of Blocks.

In the Dates area, both the Block and Triple Block fields are tinted yellow, which indicates that they are automatically calculated (based upon the date of the Activity in relation to the start of the Season) and are not manually entered or edited. Either field can be used as the basis of a search or filter.

C

Color Coding

OPAS allows for many elements of the Database to be color-coded. These colors are used primarily in List screens and provide a striking visual way to either quickly discern the different elements of a List

screen grid, or to provide an easy visual cue for filters. Colors assigned to Series, Projects and Activities also appear in the OPAS calendar section.

Colors for elements of the OPAS database are always set on the Main screen of the respective program area. Colors are always set



by clicking the standard Windows color palette icon. This will reveal the Windows color palette, from which a color can be chosen, or a custom color selected.



Note - it is likely that you will need or desire to use customized colors in OPAS. For that reason, it is highly recommended that all computers that use OPAS are set to High Color (16-bit) and not 256 color mode.

Color Coding - Days of the Week

OPAS uses the following colors to distinguish week days on all List screens:

- Yellow days indicate Monday through Friday
- Light red days are Saturday
- Dark red days are Sunday
- Orange days are Holidays

Composer

A Composer is the author of a Work or Composition.

Composers are stored in a different section of the database than are Artists and other entities, as the information kept for a Composer is markedly different. If you wish to add a Composer who is also a Performer, that person will be created in both the Artists and the Composers Sections of OPAS.

A Composer can exist in the OPAS database even if he/she has not composed any works in the database.

Creating a Composer - From the main screen in OPAS, choose Main Data | Composers... or click the Composer icon:



List	Main	Documents								
Last Name: Rachmaninoff										
First Name: Sergei										
Name 2:										
Code:										
<input type="radio"/> Female <input checked="" type="radio"/> Male										
Nationalities [1]										
<table border="1"> <thead> <tr> <th>Nationality</th> <th>Code</th> </tr> </thead> <tbody> <tr> <td>United States of America</td> <td>USA</td> </tr> </tbody> </table>		Nationality	Code	United States of America	USA	<table border="1"> <thead> <tr> <th>Residences [1]</th> <th>Code</th> </tr> </thead> <tbody> <tr> <td>Russia</td> <td>RUS</td> </tr> </tbody> </table>	Residences [1]	Code	Russia	RUS
Nationality	Code									
United States of America	USA									
Residences [1]	Code									
Russia	RUS									
Birth										
Day	Mon	Year								
01	01	1873								
City		State								
Oneg		Novgorod								
		Country								
		Russia								
Death										
Day	Mon	Year								
28	03	1943								
City		State								
Beverly Hills		CA								
		Country								
		United States of America								
Notes										

Last Name - the Composer's last name. This field is mandatory.

First Name - the Composer's first name

Code - your own short-hand name, or code, for the Composer

Name 2 - an alternate name of the Composer (for example the Composer's name as it should appear on printed programs and documents).

Nationality - the Composer's nationality(ies). Click the green "+" button to add a country of nationality

Residences - the Composer's residence(s). Click the green "+" button to add a country of residence

Birth / Death - the Date, City, State (if appropriate) and Country of the Composer's birth and death

Notes - any descriptive text regarding the Composer

Conductor

Conductors are assigned using the drop-down list on the Main screen of the Dates Section.

An event or activity does not require a conductor. A Conductor has all the same characteristics and data fields of any other Artist entry.

Creating a Conductor in OPAS - From the main screen in OPAS, choose Main Data | Artists..., or click the Artists icon.



Information stored for Conductors is identical to that of all other Artists in the OPAS database (in fact, the same person can be both a soloist and a conductor).

When creating a Conductor, be sure that the record belongs to an Address Group that is of the Conductor System Group. In most cases, this means simply choosing "Conductor" from the list. However, other Address Groups can function in the same way. For example Address Groups called "Associate Conductor", "Cover Conductor", "Choral Conductor" or "Guest Conductor" can all be created. Ensure these new entities belong to the System Group Type called Conductor.

See Chapter 4 for more information and detailed instructions on creating Artist entities in the database.

Contact Persons

Contact Persons are normally assigned to a business entity in the Address Book. They are the people who work at the business or agency.

Contact Persons are added on the Contacts / Agents screen of the Address Book area (and the Artists area of OPAS as well).

To create a Contact Person for the active Address Book record, click the green "+" key at the top right of the Contact Persons grid and fill in as many of the fields as are pertinent.

Contract Groups

Contract Groups provide the top level hierarchy under which all artist and orchestra substitute contracts are organized. The Contract Group allows for logical grouping and analysis of artist contracts and related fees.

To create Contract Groups, choose the Background Data 2 | Contract Groups menu item.

New groups are created on the Main screen, and each distinct Contract Group can have its own set of Additional Data, created on the "Add. Fields" screen (see above for more information regarding Additional Data.

Examples of Contract Groups might be:

Artist: Soloist

Artist: Guest Conductor

Artist: Chorus

Independent Contractor

Venue

See Chapter 14 for more information regarding the creation of contracts in OPAS.

Copy (Activities)

The Copy function in the OPAS Dates area is represented by the icon shown here. Clicking this icon opens the Copy Date window in which the date to which the activity will be copied is identified, as well as elements of the activity that will be copied

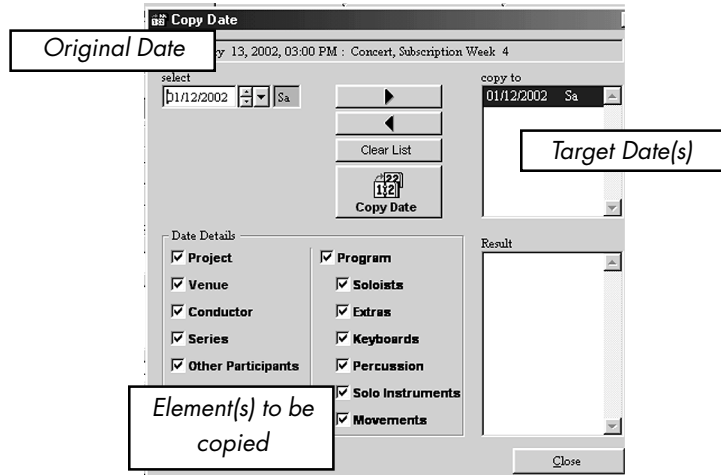


Select the desired date(s) in the top portion of the window and click the large right-pointing arrow to add them to the "copy to" window. Multiple dates can be selected at the same time.

In the bottom portion of the window, indicate the elements of the

original date to be copied.

Finally, click the large “Copy Date” button.



Countries

The list of available countries assigned to Address Book entries, Artists and Composers

To create or edit the list of Countries in the OPAS database, choose Background Data 1 | Countries menu item.

Cover Conductor

To indicate the Cover Conductor for a concert:

Ensure the Address Group “Cover Conductor” exists in the database (and that it belongs to the System Group “Conductor”)

Ensure that the “Cover Conductor” Address Group is assigned to the appropriate artist(s)

On the concert(s) in question, assign the Cover Conductor in the “Other Participants” grid on the Dates area Program screen

Currencies

Any expense in OPAS can be represented in any currency, which in turn can have an exchange rate in relation to your native currency.

Creating a Currency - From the OPAS main screen, choose the Background Data 1 and then Currencies menu item. Click the New button in the lower right hand corner to create a new currency.

For each currency, indicate the Code or abbreviation by which that currency is recognized, and the name of the currency. In the Rate

The screenshot shows a form with the following fields:

- Code: €
- Name: Euro
- Rate: 1.1487 (with a dropdown arrow) \$ = 1 €
- own Currency

field, indicate how many units of your native currency are equal to one unit of the currency you are creating.

The “own currency” check box indicates that this is your native currency, and all exchange rates

are made in reference to it. Only one currency can be your “own currency”

D

Date/Works (Date / Program)

The Date Works area of OPAS (sometimes called “Date / Program”) stores the particular characteristics of a composition relative to a particular performance. This section of OPAS allows you to store (and search for) changes in timings, movements, titles, and specific performance notes for any work on any concert.

See Chapter 7 for more information regarding this area and function of OPAS.

Dates Screen

The Dates Screen is used in the Works and Artist areas of OPAS. It lists every activity to which the Work or Artist has been assigned. To see the specific details of the date, right-click the mouse button anywhere in the Dates Tab and choose the Dates menu item.

Activities are listed in reverse-chronological order (most recent first).

Delete

The Delete icon is used throughout OPAS:



When the delete icon appears at the bottom of the screen, clicking it will delete the entire record in the program area, including all information on all screens and grids.

When the delete icon appears at the top of a grid, clicking it will delete the selected record in the grid

Delete multiple records

When on the List screen of any program area, right-clicking the Delete icon in the lower right of the screen will produce a pop-up item:

Delete Filtered Records...



Clicking this pop-up item, and clicking yes to the prompt shown here will delete all records that are currently showing on the List screen. *This action cannot be undone.*

Duty

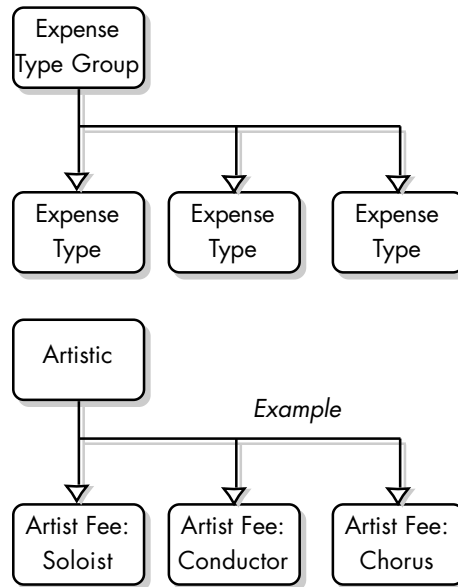
The term "Duty" is used in place of the term "Service" in some versions of OPAS. It indicates the number of service or payroll "counts" for any discreet activity in the database.

E

Expense Group

Expense Groups comprise the top level of the OPAS financial hierarchy. They provide a way to organize Expense Types (see below). To create Expense Groups, choose the Background Data 2 | Expense Type Groups menu item.

The use of Expense Type Groups is optional, but provides a beneficial structure to the financial information in OPAS.



Expense Types

“Expense Types” indicate the categories, items, and services that incur expenses by the orchestra. They are the primary way in which cost items are entered, categorized, stored, filtered, sorted and analyzed in the OPAS database. Each expense or cost item in OPAS is referred to by its Type name.

To create Expense Types, choose the Background Data 2 | Expense Types menu item.

Name	Artist Fee: Soloist	
Code	SOLO	Order
Account No.		
Amount		
Group	Artistic Expenses	

Each Expense Type has a **Name** and a short-hand Code.

Account No. - an optional internal General Ledger or accounting number to which the Expense Type can be linked.

Amount - if the expense type is associated with a fixed cost amount, that cost amount is identified here. See this section and Chapter 11 for more information regarding fixed amounts.

Group - the Group to which the Expense Type belongs. See above for more information regarding Groups.

See Chapter 11 for more information on assigning expenses

Expenses

Expenses are individual cost items that are stored in OPAS. Each cost item is created in its related program area (Services, Contracts, etc.). Each expense is then also visible in the Expenses program area. The Expenses program area consolidates cost items from every program area and provides a comprehensive overview of an orchestra's expenditures.

Expenses are covered in Chapter 11

F

Field

A "Field" is a single piece or instance of data in a database. Fields can be text: screen shot, numbers screen shot, dates/times: screen shot, or check boxes/radio buttons screen shot. Fields that are related (for example, a person's name, address and phone number for example) combine to form a "Record"

Filter

The term "Filter" in OPAS is used to indicate the manipulation of data that is visible on the computer screen. In the majority of cases, this entails manipulating data on the List screen. It can also involve data in sub-windows.

Function (Program Operation)

Functions are used in OPAS to perform operations on the database. Functions are custom-written and contain the same computer code that operates OPAS itself.

Some of the operations that Functions perform are:

- Searching/Replacing data in a program area
- Copying changes to multiple records in a program area
- Performing custom or complex calculations such as payroll
- Importing and Exporting Data

All Functions in OPAS are generated by clicking the Function icon and selecting the desired function . As with reports, only functions particular to the current program area will be revealed.



Note: As many functions change the data within the OPAS database, it is strongly recommended that you *not* run a Function unless you know for certain what the Function does. Contact Fine Arts Management for more information regarding Functions.

Functions can be written and customized for the needs of a specific organization, then imported for use in OPAS.

G

Genre

Genre is used in the Works area of OPAS. While its specific use can be left to the discretion of your own orchestra, it is an OLIS convention that Genre pertains to the forces required to perform a given Work.

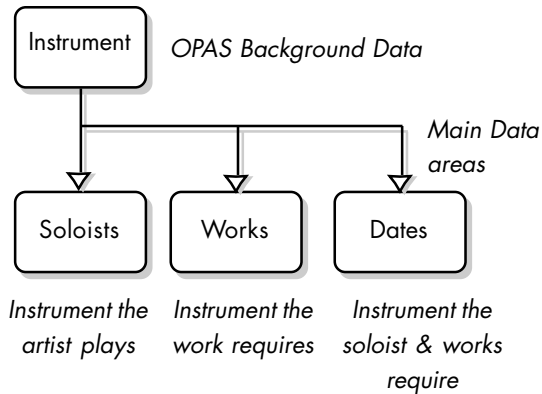
To create Genres, choose the Background Data 1 | Genre menu item

I

Instruments (General / Background Data)

Instruments comprise the orchestra or ensemble uses OPAS, and define the musical forces required to perform a musical composition. The same instrument list is used in all areas of OPAS:

See illustration next page



To create instruments, choose the Background Data 1 | Instruments Menu item. (When the Instruments area opens, press the F9 key and click Yes to the prompt. This will reveal all instruments in the database). The instruments area has two screens

- **List** - displays all instruments that meet selected criteria
- **Main** - contains the basic information about each instrument and is used to create new instruments.

Section	Clarinet
Name	E-Flat Clarinet
Name 2	
Code	EC
Job	

Section - the orchestra or ensemble section to which the instrument belongs. The

section field will indicate how and where this instrument appears in various OPAS functions. Instrument sections can be created by clicking the field label "Section."

Name - the name of the instrument as it will appear in the software and on printed reports

Name 2- an alternate name or foreign language translation of the instrument

Code - a shorthand abbreviation or code for the instrument

Job - used primarily for European payroll functions, this optional field is used to further classify and categorize instruments

See Chapter 4 for more information regarding the hierarchy of instruments and orchestra/ensemble sections.

Instruments (Owned by Orchestra Members / Main Data)

Specific instruments that are owned, rented or used by orchestra members are tracked in the Main Data | Instruments area of OPAS.

The name, serial number, insurance value, repair history, etc. for the instrument is stored in this area.

See Chapter 12 for more information.

Instrumentation Templates

Instrumentation sets or templates can be created and stored, then quickly applied to a new Work in the Database. This can save the time required to enter each individual instrument's configuration. Instrumentations can be based on genre (Classical, Romantic, Baroque, etc), or based on the physical configurations of your orchestra (Pops, Standard, Chamber, etc)

Stored Instrumentations are assigned to a Work by clicking the "Load from Instrumentation" button at the top of the Instrumentation screen in the Works Section.



This feature can also be applied in the Date/Works area of OPAS. See Chapter 5 for more information regarding musical compositions and Chapter 7 for more information regarding the Date/Works area.

Creating an Instrumentation template - From the OPAS main screen, choose Background Data 1 | Instrumentation menu items.

Click the New icon to create a new Instrumentation template or set. Give the template a name, and fill in the instrumentation (including string complement if desired).

L

Level

The Level is the arbitrary “security level” assigned to each Date (or Activity) in the OPAS database. There are four discreet Levels; Level 1 is the default level for new Dates or Activities. Read Only and Read-Write privileges to OPAS Users can be based upon these Levels. The level assigned to a Date transfers to related program areas such as Personnel.

See Chapter 3 for more information regarding Date Levels.

List Screen

The List screen is used throughout OPAS to efficiently display the contents of a program area. The most pertinent information stored for that program area is indicated at the top of each column.

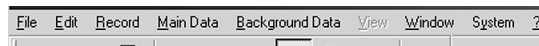
The data on a List screen can be filtered and sorted. Columns can be reordered (click the mouse on the column heading and drag it to the right or left), and resized (click the mouse between column headings and drag to the right or left). See Chapter 20 for complete information regarding the operation of the List screen.

When a program area of OPAS contains fewer than 1,000 records, it will sometimes automatically opens to the List screen.

M

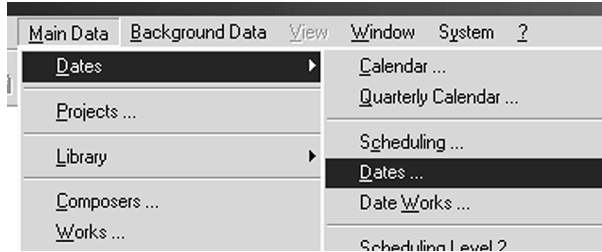
Menu

The Menu is a means by which the various OPAS program areas are displayed. In Windows programs, the top of the screen is often referred to as the Menu bar:



Menus branch out, with similar program areas located on or within the same menu item. In this document, this branching is indicated by

a vertical line: | This menu item:



Is referred to in this manual as: Main Data | Dates | Dates

N

New

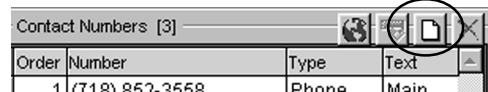
New Records are created in OPAS by clicking the "New" icon found on applicable screens:



New records can also be created through the keyboard shortcut CTRL+N (hold down the CTRL key on the keyboard and press the "n" key).

New records are always created on the Main screen of the respective OPAS program area.

New records are created in grids by clicking the New icon at the top right of the grid.



Pre-existing data are added to grids by clicking the green "+" key at the top right of the grid:



New + Copy

New + Copy indicates a new record is to be created based upon the currently active record.



When this icon is clicked, OPAS copies all applicable data fields from the current record. It then creates a new record, and automatically loads the data from those fields.

This feature is not available in every program area.

Number Types

Number Types categorize the Contact Numbers that are assigned to an entity in the Address Book or Artist areas of OPAS. Examples of Number Types are: Phone, Email, Fax. The actual description of the number type ("office", "home", "cell", etc.) is typed into the Text field in the Contact Numbers Grid on Address Book and Artist Main Tabs

Creating Number Types - From the main screen in OPAS, choose Background Data 1 | Number Types...

O

Ordering Data

Data in OPAS drop-down lists can be manipulated so that it appears in a desired order within the program and on printed reports.

There are two basic techniques for manipulating data ordering. Both involve the way in which the data is typed to "fool" the computer into sorting properly. This is necessary because many fields in OPAS are alphanumeric and so the fields sort alphabetically and not numerically. Taking Project names as an example, "Subscription Week 11" will come before "Subscription Week 2" in a list because the "letter" 1 comes before the "letter" 2 (even though, logically and chronologically, Subscription Week 2 comes first).

Option 1 - Place an extra space before the numbers 1 through 9 in lists that include Words and Numbers. For example:

Masterworks 1

Masterworks 9

Masterworks 10

OPAS will read the extra spaces when sorting, and lists will “properly” sort (Masterworks 10 will come after Masterworks 9). This technique is often used in the Works area of OPAS, in the Title 1 field. In this way, concertos and symphonies that number more than 10 are displayed on the List screen in proper order.

Option 2 - Place a zero before the numbers 1 through 9 in lists or data fields that include Words and Numbers. This method is often used when indicating the seating order of musicians in the orchestra:

B01

Indicates the Second Stand / First Chair. For large sections such as the string sections, this ensures that lists and reports properly order the section:

B08

B09

B10 Etc...

P

Premieres

A Premiere is the first performance of a musical composition. Different types of premieres (world, U.S., North American, etc.) are created in the Background Data 1 | Premiere Types program area.

Premieres are assigned to work records to record the absolute premiere of a composition (that is, the first performance, regardless of when or where the performance took place). This information is stored on the Additional Data screen of the Works program area (see Chapter 4).

When the orchestra using OPAS gives the premiere of a work as part of its concert season, that premiere is assigned in the Date/

Works area of OPAS (see Chapter 7). An OPAS

Presence Type

“Presence Type” is the term used to describe a musician’s participation (or lack thereof) in an activity.

Instead of merely indicating that a core musician or a substitute is “present” or “absent” for a concert or rehearsal, OPAS allows for the creation of terms that more accurately indicate how the musician is present or absent. Examples of Presence Types are:

Present

On Call

Standby

Sick Leave

Jury Duty

Sabbatical

Discretionary Leave

Etc.

Each Presence Type can have attributes that affect how attendance figures and payroll amounts for a Musician are calculated. For example, a musician assigned to an activity with the Presence Type “Jury Duty” may get 100% of the pay due for that activity, but are not counted as being present at all.

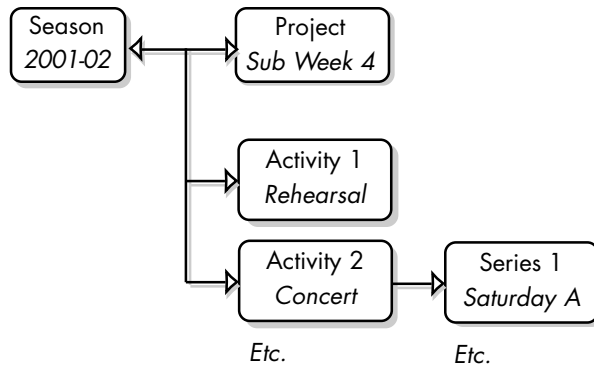
Presence Types are used in the Service Attendance area of OPAS (Chapter 15)

Project

“Project” is the name given to the highest organizational level under which all Orchestra’s activities are grouped. Examples of Projects are: Subscription Week 1, Subscription Week 2, Recording, Auditions, Domestic Tour, Family Series, etc. OPAS uses a combination of Project and Season to uniquely define each activity or “date”

in the orchestra's schedule. This association is critical as it forms the basis for the vast majority of program functions, and virtually all data analysis and reporting issues.

A Project can contain any number of different Activities. In addition, any number of different Series can be linked to the same Project/Activity combination.



Creating Projects in OPAS - From the OPAS menu, choose Main Data | Projects. The Projects area opens on the List screen.

The Projects area is divided into eight sections or screens:

- **List** - shows a grid or List of all Projects that meet the criteria you choose
- **Main** - displays basic information about the Project
- **Contracts** - shows all soloist and conductor contracts assigned to this Project, and all Orchestra Substitute contracts assigned to this Project
- **Rental Contracts / Perusals** - shows all score rental contracts and score perusal orders associated with this Project
- **Expenses** - shows all expense items associated with this project
- **Budgets** - allows for input of the Project's expense budget for a particular Season

- Dates - Displays all activities or dates associated with this Project
- To-Do List - Allows for tracking of specific documents or tasks associated with this Project

List Screen - The List screen is used in all areas of OPAS, and provides a consolidated inventory of the entire program area's contents. In Expense Types the List screen displays the Name, Code, Account Number

The columns on the screen can be:

- resized (float the mouse cursor between column headings and drag to the right or left)
- re-ordered (click on a column heading and drag it to the right or left)
- re-sorted (click on a column heading to sort the list by the contents of that column.) By default, this List screen sorts by Expense Type name.

See Chapter 20 for more information on working with grids such as those on the List screen.

Main Screen - This screen contains all the pertinent information for a Project and is used to create new projects.

Name - the Name of the Project as it will appear in the program and on printed reports and documents.

Name 2 - an alternate Name for the Project (for example, it could be the name of the Project as it should appear on printed documents)

Code - a short-hand abbreviation or code for the Project. This can appear in schedules or reports in place of the Name if required.

Services - a check in this box indicates that the activities that take place within this project are those to which Orchestra members and/or substitutes can be assigned.

Account No. - an internal General Ledger or Account Number to which charges against this Project apply

Notes - any amount of descriptive text regarding this Project

Season - the Season field on this screen is used exclusively for searches. It enables the components of a Project (as defined on the main and subsequent screens) to be isolated and analyzed by concert Season.

Contracts Screen - The top grid of this screen displays all soloist and conductor contracts assigned to the Project. These contracts will have been created in the Contracts program area of OPAS - see Chapter 14 for more information on creating guest artist contracts.

The bottom grid displays all orchestra substitute contracts assigned to the Project. These contracts will have been created in the Substitute Contracts program area of OPAS. See chapter 16 for more information on creating substitute contracts.

To open any contract that appears in either grid, simply double-click the desired row in the grid.

Rental Contracts / Perusals Screen - The top grid of this screen displays all score rental contracts assigned to the Project. These contracts will have been created in the Rental Contracts program area of OPAS. See Chapter 5 for more information on creating score Rental Contracts.

The bottom grid displays any score perusal orders assigned to the Project. These perusal orders will have been created in the Perusals program area of OPAS. See Chapter 5 for more information on creating score Perusal Orders.

To view the details of any score rental or perusal order simply double-click the desired row in the grid.

Expenses Screen - This screen displays all expense items associated with the Project. Each row of the grid indicates the Source of

the expense (the OPAS program area in which the Expense was created), the amount, type and the account numbers for both the Expense type itself, and any Series account number.

Expenses for the Project can be entered directly on this screen. To do so, click the green "+" button at the top right of the grid.

See Chapter 11 for more information on Expenses and Expense Types.

Budgets Screen - The Budgets screen is used to indicate the total expense budget for the Project, for a specific season. This information can then be used in comparative analysis with actual Expense items entered into OPAS.

To add a budget figure to a Project, click the green "+" icon at the top right of the grid. Choose a Season from the drop-down list and click the large right-pointing arrow to add it to the grid. Then simply type the budget figure for that Project and Season in the Amount column.

Note - Budget figures can also be assigned to Expense types - see Chapter 11 for more information.

Dates Screen - This screen displays all activities or dates associated with the Project. See Chapter 3 for more information regarding dates and orchestra schedules.

To see the full details of any single date record, simply double-click the desired row in the grid.

To-Do List Screen - This screen is used to track specific items, tasks or documents for the Project in question. This To-Do List functions just as do those in other areas of OPAS. See Chapter 8 for more information on To-Do Lists

PW

“PW” stands for Performance Week or Production Week. Unlike the standard Calendar Week, the Production Week is calculated from the start of the Season, not the start of the calendar year. A “4” in the Production Week field indicates the Activity takes place in the 4th week of the Season.

As the Season and Activity date calculate the Production Week number, the User cannot edit it.

R

Record

A Record is a single instance of related data in the OPAS database. Separate data fields combine to create a data Record. For example, the following fields:

Date

Project

Season

Start Time

End time

Venue

Conductor

Are but a few of the data fields that, when combined, create an activity Record in the Dates area of OPAS.

Related Data

OPAS is built upon a Relational Database, which means that (virtually) every piece of information is tied to, or relates to, other pieces of information. For example, an Artist is tied to a Concert, a Work, a Venue, a Conductor, a Date and Time, etc. Any one of these pieces of data is related to every other piece. Sometimes related pieces of data reside on the same screen, and sometimes they reside in other areas of the software. For example, to see the Library Holding information that relates to a particular composition, the Library area of OPAS must be referenced.

OPAS allows for quick navigation between areas of the program that contain related data. Either click on the Related Data icon, or press the F11 key on your key-



board. This will display a menu of program areas that have related data in them.

Activity	Performance	City
Run-Out	<input checked="" type="checkbox"/>	Ches
Concert	<input checked="" type="checkbox"/>	Artir
Concert		Artir
Dress		Artir
Rehea		Artir
Rehea		Artir
String		Artir

Dates ...

Activities ...

Projects ...

Artists ...

Address Book ...

Or right-click the mouse on any item within a grid. Related program areas will appear from the pop-up menu. This example shows the menu that appears when

the mouse is right-clicked in the Dates grid of the Works program area.

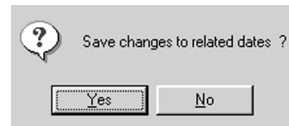
Related Dates

OPAS defines Related Dates as any activities that share the same Project and Season.

S

Save to Related Dates

When a change is made and saved in the Dates area of OPAS (to a date of any "level"), OPAS displays this prompt.



Clicking Yes will display a list of related dates - all activities assigned

to the same Project and Season. Desired dates from this list can be selected, and the same change applied to them.

This feature also appears in the Dates Accounting area of OPAS. See Chapter 3 for more information regarding the Dates area, and Chapter 16 for more information regarding the Dates Accounting area.

Score Types

Score Types indicate the kind of physical scores that are stored in

the Orchestra's Library (such as piano/vocal, full, miniature, study, etc.). These score types are recorded in the Scores grid on the Library Main Tab.

Creating Score Types - From the main screen in OPAS, choose Background Data 2 | Score Types...

Season

A Season is the logical grouping of an Orchestra's activities within a calendar year.

A Season must have a valid Start and End date - the End date must be after the start date. A Season does not need to cover an entire 365-day calendar year. For example, activities within a calendar year could be divided into 2 distinct seasons:

2000 Summer Season: June 1, 2000 to August 1, 2000

2000 - 01 Season: September 1, 2000 to May 31, 2001

Seasons may have "gaps" or dates that are not included in any Season - while this is technically permitted, care must be taken to not schedule any activity in that "gap". In the example above, the days in August 2000 are not in any Season. Any activity scheduled during this time will not properly appear on Schedules, Calendars and Reports.

While it is recommended that the practice be avoided, Seasons may overlap; the same day on the calendar may be part of two or more different seasons. This is primarily the case with larger orchestras in which a Pops or Chamber Orchestra "season" is separate and distinct from the main orchestra "season".

Creating a Season - From the main screen in OPAS, choose Background Data 1 | Seasons...

The Seasons area is divided into three sections or screens:

- List - shows a grid or List of all Seasons that meet the criteria you choose

- **Main** - displays basic information regarding the Season
- **Set Points** - sets the maximum number of services, hours or work days allowed by your orchestra for each segment of the season.

The **Main** screen is used to create new Seasons. Click the New icon in the lower right of the screen, and fill in the **Name** of the Season, the **Code**, and the **Start** and **End Dates**.

Period - this number indicates the number of weeks that each Block contains. A "Block" is an arbitrary time period used primarily for accounting purposes. See this glossary for more information regarding "Blocks".

Days / Services / Hours - these numbers define the limits of these three activity components within each Season.

Set Points Screen - The Set Points screen is used to indicate the service limits for various performance components. For each Day / Week / Block and Season, indicate any or all of the maximum number of Work Days, Services, or Hours allowed by your individual orchestra contract.

OPAS then compares these limits to scheduled activities and indicates where those activities exceed the limits. See "Season Control" below.

Season Control

The OPAS "Season Control" is a report that compares the actual number of scheduled Work Days, Hours and Services in a given time period to the maximum allowed. The maximum number of Days/Hours/Services is set on the Seasons "Set Points" screen (see above).

In the Dates area of OPAS, select a time period up to and including an entire season (see Chapters 20 and 21 for more information on searches and filters). From the List screen, click the Report icon (or press the F4 key on the keyboard). Select the "Season Control" report and click the Preview button.

Each activity in the time period selected will appear on the left side of the screen, grouped by week. The middle columns of the report will display the Day/Hour/Service totals for each activity. When the number of scheduled Days/Hours/Services exceeds the maximum, the number by which the maximum is exceeded is displayed in the rightmost columns.

Series

Series are applied to concerts and activities in the Dates area of OPAS, and indicate that a specific Activity takes place on more than one sequence of Concerts. A Series most often indicates marketing or ticketing distinctions. For example, an Orchestra might have an "Introduction to the Classics" Series, a "Rush Hour Series" and a "Friday night mini-subscription" package available to the public.

Code	Serie	Account No.
SetC	Saturday Classics I	

The Series grid enables you indicate that a single concert on a Friday night is available to the public on all three of those series.

The use of series is optional

Creating Series - From the main screen in OPAS, choose Background Data 1 | Series...

The Series area is divided into two screens or sections:

- List - shows a grid or List of all Series that meet the criteria you choose
- Main - displays basic information regarding a particular Series

The **Main** screen is used to create new Series. Click the New icon in the lower right of the screen

Name - the Name of the Series as it will appear in drop-down lists and on printed documents

Name 2 - an alternate Name for the Series (for example, it could be the name of the Series as it should appear on printed

documents)

Code - a shorthand or abbreviation for the Series

Account Number - a General Ledger or accounting code for the series (optional)

Notes - any description or other general information regarding the series

The Dates grid at the bottom of the screen lists all activities in the database that have been assigned to this Series. Series assignments are made in the Dates area of OPAS (see Chapter 3).

Service

A Service identifies an Event or Activity for the purposes of paying an Orchestra Member. Each single event or activity can contain any number of services. This distinction is made for recorded concerts, tour concerts or other events for which a musician may be paid over and above a base rate.

“Set to Main”

Instrument and Group Grids in the Artist and Address Book areas of OPAS have a “Set to Main” button at the top of the Grid. This is used to signify any Artist who plays more than one instrument, or belongs to more than one Group. This button will indicate which of the Instruments (or Groups) are considered primary or “Main.”

The Instrument or Group considered “Main” will be the one that appears on all List screens for the entity.

The Address Group that is set to main will dictate the fields that appear on the Additional Data screen (see this section for more information on the Additional Data screen).

To select or change the Instrument or Address Group that is “Set to Main”, simply click the appropriate row in the grid and click the Set to Main button. The selected row will be highlighted in yellow.

Except as noted above, this change does not in any way affect the

way in which OPAS uses and defines this data. An Artist who is both a violinist and a violist will appear whenever searching for either instrument. Similarly, when an artist belongs to both the Soloist and Conductor Address Groups, the Artist will appear in both areas of the Dates section.

Soloist

A Soloist is any Artist (or Ensemble) assigned to a specific Work (or Works) for a specific Date or Activity.

A Soloist must belong to an Address Group that is of the Soloist System Group. In most cases, the Address Group will also be called "Soloist", but may also be "Chorus", "Trio", etc. See this section for more information on Address Groups and System Groups.



Soloist	Instrument	Code	Main	Section
Avesian, Holly	Harp	Hp	<input checked="" type="checkbox"/>	Harp
Azkoul, Jad	Guitar	GU	<input checked="" type="checkbox"/>	Strings
Barrueco, Manuel	Guitar	GU	<input checked="" type="checkbox"/>	Strings
Beck, Steven Samuel	Piano	Pf	<input checked="" type="checkbox"/>	Keyboard
Campbell, Nathan	Piccolo/Pettr	PT	<input type="checkbox"/>	Trumpet
Campbell, Nathan	Trumpet	Tp	<input checked="" type="checkbox"/>	Trumpet
Chee-Yun,	Violin	VI	<input checked="" type="checkbox"/>	Strings
Clark, Graham	Tenor	v5	<input checked="" type="checkbox"/>	Solo Voice
Coombs, Melissa	Soprano	v1	<input checked="" type="checkbox"/>	Solo Voice
Danchenko, Victor	Violin	VI	<input checked="" type="checkbox"/>	Strings
Davidson, Anne	Piccolo	Pi	<input type="checkbox"/>	Flute
Davidson, Anne	Alto Flute	AF	<input type="checkbox"/>	Flute
Davidson, Anne	Flute	Fl	<input checked="" type="checkbox"/>	Flute
Galvin, Eugene	Bass	v7	<input checked="" type="checkbox"/>	Solo Voice
Goode, Richard	Piano	Pf	<input checked="" type="checkbox"/>	Keyboard
Green, Patricia	Mezzo Sopr	v3	<input checked="" type="checkbox"/>	Solo Voice
Kaler, Ilya	Violin	VI	<input checked="" type="checkbox"/>	Strings
Kaler, Ilya	Violone	VL	<input type="checkbox"/>	Strings
Lackey, John	Tenor	v5	<input checked="" type="checkbox"/>	Solo Voice
Lang, Petra	Mezzo Sopr	v3	<input checked="" type="checkbox"/>	Solo Voice
Lee, Sharon	Flute	Fl	<input checked="" type="checkbox"/>	Flute
Lewis, Keith	Tenor	v5	<input checked="" type="checkbox"/>	Solo Voice

To assign a soloist to a work on a program, first select that work in the Program Grid of the Dates area (see Chapter 3). Click the green "+" icon at the top right of the Soloist grid, which will open the soloist selection window.

All Artists and Ensembles in the database will be listed here. If an artist plays more than one instrument, each will be listed. The "main" instrument (see "Set to Main" in this section) will be in yellow, with an "x" in the "Main" column.

This window displays the attributes of other List screens in OPAS, and can be sorted and filtered. For example, to quickly filter the Add Dates/Soloist window so that only pianists are displayed, click the word "Piano" and press the F7 key on your keyboard, or click the "Select Filter" icon: screen shot.

To assign a soloist, either double-click the desired entry in the desired entry Add Dates/Soloist window, or click once and then click the large arrow. As many soloists as necessary can be added at one time.

Click the "Close" button to return to the Program screen of the Dates area.

Click the "Artists" button to open the Artists area of OPAS (see Chapter 4) and load the selected Artist.

Strings

Similar to Instrumentations (see above in this section), the Strings feature in OPAS allows the creation of named string complements or forces. These can then be assigned to Works by name, saving the time and possibility of error when entering individual numbers.

Creating a String set - From the OPAS main screen., choose Background Data 1 and then Strings

String sets or complements are created on the Main screen. They have a name, code and specific forces for each Violin 1, Violin 2, Viola, Cello and Bass. String forces can be repertoire-specific ("Baroque Orchestra", "Woodwind Pairs") or specific to your orchestra ("Standard Strings"; "Enhanced String Forces"; "Pops", etc.)

String sets or complements are assigned in the Works area of OPAS, on the Instrumentation screen (see Chapter 5). They can also be assigned in the Date / Works (or Date/Program) area, again on the Instrumentation screen, when the number of strings pertains to a particular performance of a composition (see Chapter 7).

System Group

System Groups are set in OPAS and cannot be created, edited, or deleted. System Groups provide the toplevel hierarchy under which all OPAS entities (artists, venues, businesses, ensembles, etc) are organized. See "Address Groups" above for more information.

T

Templates

1. Expenses

Expense templates are sets of similar or related cost items. These cost items are arranged and set into a template. The template is then assigned in the Expense Combination area of OPAS, thereby automatically assigning all of the items on the template. See Chapter 11 for more information.

2. To-Do List

"To-Do List" templates are sets of similar or related checklist items. These checklist items are arranged and set into a template. The template is then assigned on any of OPAS's various To-Do List screens, thereby automatically assigning all of the items on the template. See Chapter 9 for more information.

3. Reports

Reports that output to Microsoft Word do so into a pre-formatted Template. This template is a rich text format ("rtf") file that can be opened and edited in Word. However, it is strongly recommended that you not do this without first contacting Fine Arts Management for further instructions as improperly editing a report template can render it useless.

4. Instrumentation

See "Instrumentation Templates" above

5. Strings

See "Strings" above

Ticket Categories

Ticket Categories are used to organize ticket classifications for use in the Marketing area of OPAS (see Chapter 10). Ticket Categories

should be created around different price categorizations (Subscription, Single Ticket, Complementary, etc.) and not areas of a hall or venue (Orchestra, Mezzanine, etc.).

To create ticket categories, select the Background Data 2 | Ticket Categories menu item.

The Ticket Categories program area contains two sections or screens:

- List - displays all ticket categories that meet select criteria
- Main - displays the basic information regarding a single ticket category and is used to create new categories

Each Ticket Category consists of a

Name - the name of the category as it will appear on screens in OPAS and on printed reports.

The screenshot shows a software window titled "Ticket Categories 1 (Discounted Single Tickets)". Inside the window, there is a "List" button in the top right corner. Below the button, there are several input fields: "Name" with the text "Discounted Single Tickets", "Code" with the text "S-D", "Order" with the text "06", "Account No." which is empty, and "Ticket Price" with the text "0.00".

Code - a shorthand code or abbreviation

Order - the order in which the Ticket Category will appear on the Marketing grid in the OPAS Dates

Marketing area (see Chapter 10)

Account number - an optional General Ledger or accounting code

Amount - used if the Ticket Category has a fixed amount associated with it. In many cases, this amount will be left zero, and an average or aggregate price will be assigned in the Marketing program area. It is not the intent of OPAS to replicate a box office system, and so it is advisable to not replicate each discreet pricing category for each type of single ticket or single ticket discount.

Title (Composition Title)

OPAS offers three distinct titles for every composition in the database. Only Title 1 is mandatory.

The conventions used to differentiate between titles have its origins in the American Symphony Orchestra League's OLIS database. These conventions make possible both data consistency, and control over display on printed reports.

TITLE (top field) is the primary title of the work, and is entered using specific syntax. This makes it possible to reliably find all compositions of a particular type, and to ensure that the same work isn't entered multiple times.

Work Title 1 Syntax - The Title is always entered in all capital letters, with no special characters. This ensures consistency, and makes searches and filters more reliable.

Concerti begin with the word "CONCERTO" followed by a comma, the instrument, and if applicable, the number of instruments.

"Opus" can either be spelled out (OPUS) or abbreviated (OP.). In either case, its use should be consistent throughout the database

Common names for works appear at the end of the work, in parenthesis. For example: SYMPHONY NO. 101 IN D MAJOR (THE CLOCK)

TITLE 2 indicates the Title of the composition as it should appear on printed programs, schedules, reports and other documents. In some cases, Title 2 and Title 1 will be identical.

The name or title of the work as it appears in the Title 2 field can contain special characters, if required (see Chapter 23 for more information on entering special characters).

Left and right carats in a Title 2 field ("*<*" and "*>*") indicate that the text within the carats should appear in italics. This feature is used

almost exclusively when printing reports or documents to your word processing program. Specially designed Microsoft Word macros (provided by Fine Arts Management) scan documents, remove the carats, and italicize the text.

The title of the composition as it appears in Title 2 can also be changed for an individual performance in the Dates / Works area of OPAS (see Chapter 7 for more information).

Other examples of the difference between Title and Title 2 for individual works:

TITLE: CONCERTO, VIOLINS (2), D MINOR, BWV 1043

TITLE 2: Concerto in D minor for Two Violins and String Orchestra, BWV 1043

TITLE: CANDIDE: OVERTURE

TITLE 2: Overture to <Candide>

TITLE 3 is provided for foreign-language translations of composition titles or for alternate titles.

U

User

The term "User" refers to the person using the OPAS software

User-Defined

"User Defined" refers to an element of the OAPS software, and indicates that the element can be modified, or defined, by the User. For example, most color-coding in OPAS is User-Defined. You, the User, decide what the various display colors will be for Projects, Series, Activities, etc.

User Rights

"User Rights" define the set of permissions assigned to a particular person using the OPAS software. User Rights are tied to a User Name and a Password.

User Rights comprise four different components:

- Read (the User can see the data)
- Change (the user can Edit the data)
- Append (the User can create data)
- Delete (the User can delete data).

These rights can be assigned in different combinations across different areas of the program

See Chapter 25 for more information regarding the creation and modification of User Rights.

V

Venue

A Venue is any physical location in which an Activity takes place.

A venue can be an entire building, or a room within a building (such as a rehearsal room). A Venue has all the same characteristics and data fields of any other Address Book entry - see Chapter 8 for complete information regarding the OPAS Address Book..

Creating a Venue - From the main screen in OPAS, choose Main Data | Address Book.

The Address Book area is divided into six different screens, each of which stores different information about the Venue.

Venues are created on the Main screen. When creating a Venue, fill in as many of the different data fields as are pertinent. Keep in mind that most printed reports and documents generated by OPAS will use either the "Company Name" or the "Code".

In the upper right hand corner of this screen, ensure that this Address Book entry is assigned to the Address Group "Venue". The "Venue" Address Group in turn belongs to the "Location" System Group. This means that the word "Venue" can be changed, and other Address Groups can be created that will function in OPAS just as "Venue" does. Other examples might be "Tour Venue"; "Outdoor",

etc. See this glossary of terms for more information regarding System Groups and Address Groups

Venues can contain their own set of Additional Data, stored on the Additional Data screen. You may wish to store venue capacity, stage size, information regarding house pianos, etc. See this glossary of terms for more information regarding the Additional Data screen.

Venues are assigned to activities on the Main screen of the OPAS Dates area. Each Activity will take place in a single venue.

W

Week

The Week field displayed in the Dates area of OPAS indicates the number of the week in which an Activity takes place. This number is expressed by a combination of the calendar year and the week number. An "01-49" in the Week field indicates the Activity takes place in the 49th Week of 2001.

The screenshot shows a date selection interface with the following fields: Date (12/09/2001), Day (Su), Week (01-49), Month (12), Year (2001), and Day of Week (10). The Week field, containing '01-49', is circled in red.

As the Activity Date calculates the week number, an OPAS User cannot edit the week field.

Wildcard

In OPAS, the asterisk "*" is the wildcard character that is used in searches. Including an asterisk literally tells OPAS to find the requested data "plus anything else."

For example, if when searching by the title of a work, the following is placed in the Title 1 field:

March

OPAS will find any composition where "any characters at all" are followed by the word "March" which is then followed by "any characters at all". That is, any composition in which the word "March" appears anywhere in the title. The search will return "Liberty Bell March", "March of the Wooden Soldiers" and "Funeral March of a Marionette"

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