

Assign Musicians to Services (Basics)

Before assigning musicians to services, it can be helpful to first ensure that the following background data is configured in OPAS. While you *can* configure this background data “as you go,” it can save time and streamline the process to have as much of the following set up in advance:

- Musicians – Core or staff members of the orchestra, and substitutes (See the OPAS How-To Guide “Setting up Orchestra Musicians”)
- Presence Types – The ways in which musicians are marked as present or absent for a service. The Presence Types area can be found under the Background Data 2 | Presence Types menu item (See the OPAS How-To Guide “Setting up Presence Types”)

Open the Service Attendance area of OPAS

Musician assignments are created in the **Service Attendance** area of OPAS.

Set the parameters for the service assignments

The **Service Attendance** grid in OPAS will show services or activities in columns. Musicians will appear in rows. You will simply click the name of the activity, the name of the musician or the cell for the musician’s participation in the activity to assign the musician(s) to the service(s).

The settings you make in the top portion of the Service Attendance grid determine what the grid will show. There are myriad ways in which the grid can be set, and you will likely use different settings for different situations. There is no one correct way to set the parameters at the top of the screen, and this guide will merely indicate the most common methods:

(a) Set the ensemble section

The top drop-down field indicates the **Section** of the orchestra or chorus for which assignments will be made.

You do not *have* to set the section and leaving it blank will load the entire orchestra, but doing so can greatly speed the operation of the grid (as there is much less data for the screen to manage). The obvious flip side of this, however, is that you’ll then spend time moving from section to section while making your assignments.

Experiment with this setting to find the method that best suits your operation.

(b) Set the Season

You *must* indicate the **Season** for which assignments will be made. This is required simply so the system can better manage the tens of thousands of service records that accumulate in each concert season

(c) Set the Project, Date Range or Service Range

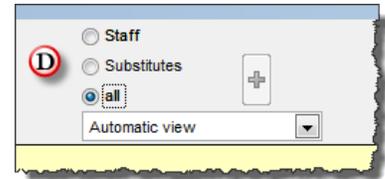
After the Season is set, you can then **refine the date or service range** to be displayed (as, except for special circumstances, you rarely need or want to see an entire season’s worth of service records).

To do this, indicate

- 1) The Project (the drop-down will only show you Projects that have scheduled activities within the Season) – **or** –
- 2) The Performance or Production Week (the week of the season) – **or** –
- 3) The Month and/or Year
- 4) Any **Date Range** of your choosing

(e) Set the musicians to display

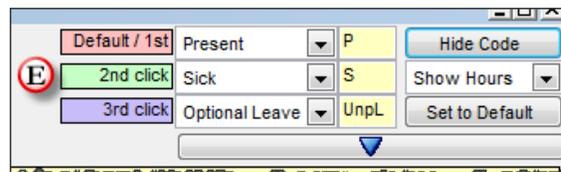
To the right of the section drop-down are three buttons that indicate if the grid should display **Staff** (core members of the ensemble), **Substitutes** (and Extras) or **All** musicians. Especially if you anticipate assigning extra or substitute musicians, it can save time to click the All option before loading the grid.



(e) Set / Check the Presence Type options

In the upper right of the **Service Attendance** grid, each of the three drop-down lists contains your list of Presence Types. These fields dictate **how clicking your mouse will assign musicians**.

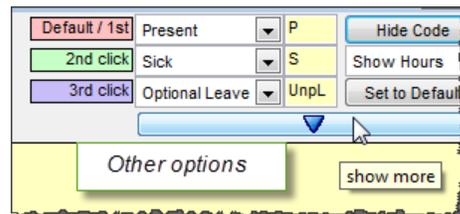
When you click:



Once, the top presence type will be assigned
Twice (double-click), the middle presence type will be assigned
Three times (triple-click), the bottom presence type will be assigned

Note: OPAS saves these settings with your username and password so you needn't re-set them each time you make musician assignments.

Set other options



These settings are **optional** and refine the information that OPAS will present in the **Service Attendance** grid. If you are assigning a typical week of standard orchestral services, you probably do not need to incorporate any of these settings and can skip down to the next step.

However, if you are assigning a more complicated set of services such as:

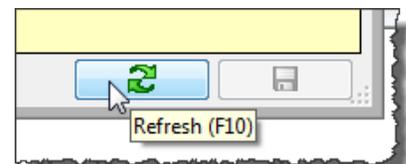
- A split-orchestra week
- A set of activities that contain multiple ensembles such as the main orchestra and a youth orchestra, or the main orchestra and a chorus

Then these settings can greatly help refine the **Service Attendance** grid contents.

See the companion guide "Service Attendance Advanced Features" for a description of these settings.

Click the **Refresh** button

At the *bottom* of the **Service Attendance** screen is the standard OPAS 'Refresh' button (the green circular arrow). Click this button and the program will fill the Service Attendance grid with services that meet the criteria you specified.



Check the screen

The Service Attendance grid will show **musicians in each row**, and **services in each column**. The exact configuration of rows and columns will depend upon the criteria

you set at the top of the screen, and so your screen may look different than those here. However, in all cases the operation of the screen is the same



“I see strange things in the grid...”

If there are **exclamation points** in the cells or boxes that represent a musician’s participation in a service, this musician has been **pre-assigned an absence** such as a sabbatical, leave of absence, vacation, etc. If there are exclamation points, **OPAS will ignore any assignments you may make in the grid**, and will instead assign the advanced absence when you click save. Regardless of what Presence Type you may assign to this musician, OPAS will revert to the absence previously assigned.

See the OPAS how-to guide “Assigning Advanced Absences” for more information

If the cells or boxes that represent a musician’s participation in a service are **outlined in red**, this musician has already been assigned to this service, but to **an instrument other than the one in the active section**. This occurs most frequently with the violin sections and indicates, for example, that while this musician is a member of the Violin 1 section, he/she is already booked for this service playing another instrument (presumably Violin 2).

If the cells or boxes that represent a musician’s participation in a service are **solid red**, this musician is already booked on **another service** (an activity not represented on the Service Attendance grid).

P	P	P
P	P	P

Assign the Musicians

To assign musicians, you can click:

1. The **Musician’s Name** – doing so will assign the musician to **all activities** using the Presence Type associated with

Default/First drop-down at the top of the screen. Note that if you double-click or triple-click the, ‘second’ or ‘third’ Presence Type will be assigned.

2. The **Activity Column** – doing so will assign **all musicians** using the Presence Type associated with the Default/First drop-down at the top of the screen. Note that if you double-click or triple-click the, ‘second’ or ‘third’ Presence Type will be assigned.

3. The **Set to Default button** at the top right of the screen. This will assign **all musicians** to **all activities** in the grid, using the Presence Type associated with

the Default/First drop- down at the top of the screen.

4. **Individual cells or boxes.** If you need more control over the assignment of musicians, you can click the individual cells or boxes that represent a musician's participation in a single service. Clicking once will designate the Presence Type associated with the Default/First drop- down at the top of the screen; if you double-click or triple-click the, 'second' or 'third' Presence Type will be assigned.

Click Save To commit the service assignments to the OPAS database, click the large **Save** button in the lower right-hand corner.

