

Copy Itineraries between Contracts

Using itinerary templates, you can easily auto-populate the itinerary of a contract. This function is used when soloist or conductor contracts have similar or repeating data and saves the time/effort of manually typing in those itinerary items.

Create Itinerary Templates (do this step one time only)

All itineraries are attached to Contracts, so you will create template contracts that will house your standard itinerary items. This same technique is used when creating templates to auto-populate entire contracts, and if you have created those contract templates already, you can skip this step.

Refer to the How-To Guide: **Auto-Generate Contracts** for more detail on creating contract templates. The instructions are given here in an abbreviated form.

Create a New Contract Template Open the **Contracts** area and click the **New** icon at the lower right of the screen. Create a contract with these attributes:



The screenshot shows a web form for creating a contract template. The fields are as follows:

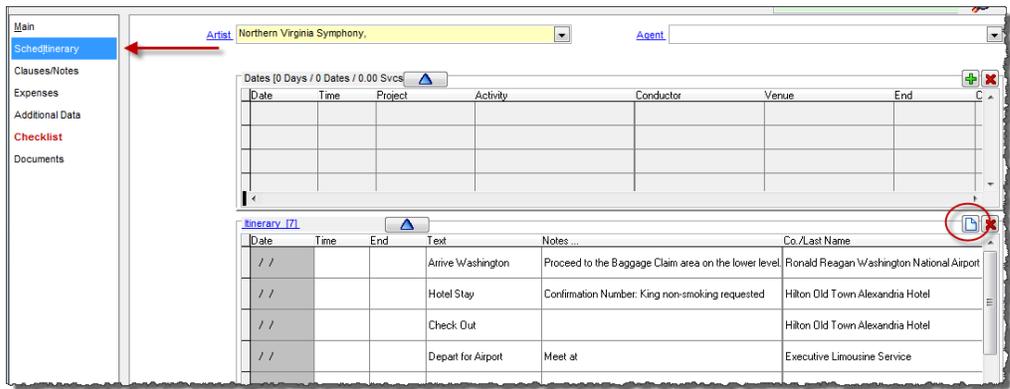
- 1** Project: Administration (dropdown menu)
- 2** Season: 15-16 (dropdown menu)
- Title: ITINERARY TEMPLATE - SOLOIST
- Contract No.: (empty text field)
- Code: TMP
- 4** Code: TMP (text field)
- Artist: Northern Virginia Symphony (dropdown menu)
- Instrument: (empty text field)
- Agent: (empty dropdown menu)
- Group: Performance - Soloist (dropdown menu)
- Status: Tentative
- Job: (empty dropdown menu)
- Classification: (empty dropdown menu)
- Engag. Reason: (empty text field)
- Notes: This contract is used to house the main itinerary items for a standard soloist contract

- 1. Project** - Administration or another generic non-performance Project (you can even create a separate Project for these contract Templates if you like).
- 2. Season** – Itineraries are copied *within a single season* so be sure this is updated to reflect the current season
- 3. Title** - Any descriptive title with the word “Template” in it so this entry will not be confused with an actual artist contract
- 4. Code** – TMP or TEMP
- 5. Artist** – Ideally this will be a Staff member or your own orchestra; any person that will help you not confuse this with a real contract.
- 6. Group / Status / Job** (optional) – Fill these in as used by your organization.

Fill in the Itinerary information

Fill in the **Sched/Itinerary** screen with the items such as arrival, hotel stay, departure, conductor meetings, receptions, ground transportation and other items that find their way in to each printed Artist Itinerary.

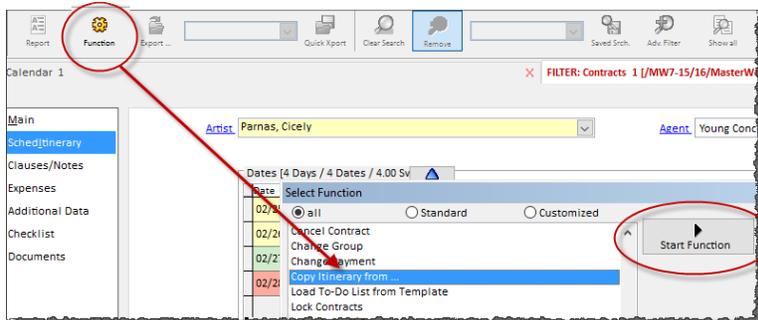
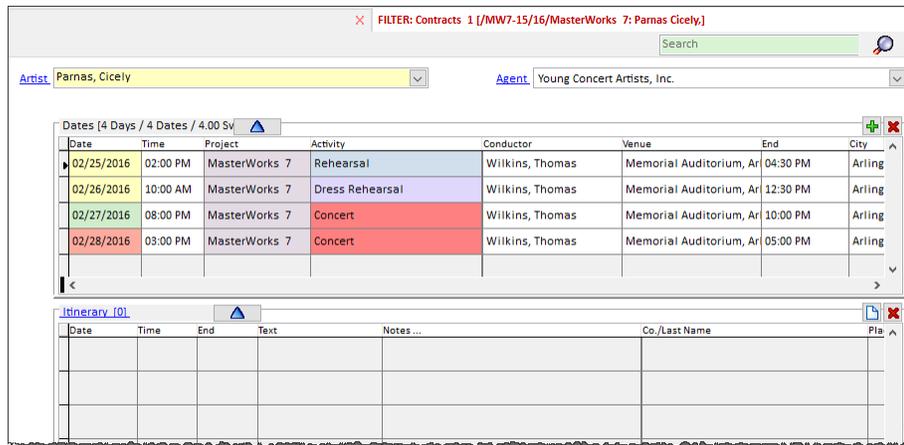
Click the **Add** icon at the top right of the grid to create an entry. Leave each Date and Time blank. After the copy itinerary function runs, the actual dates / times for these items can be added to the artist’s schedule. (see next page)



Make this template as complete as you can. It is easier to remove itinerary elements that are not required, than to add new ones.

Use the “Copy Itinerary” data function

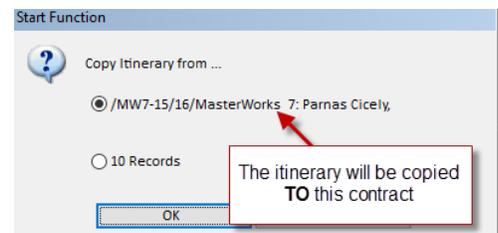
After the Itinerary template has been created, it can be applied to any contract. In this example, a Masterworks contract has rehearsals and concerts, but no itinerary items:



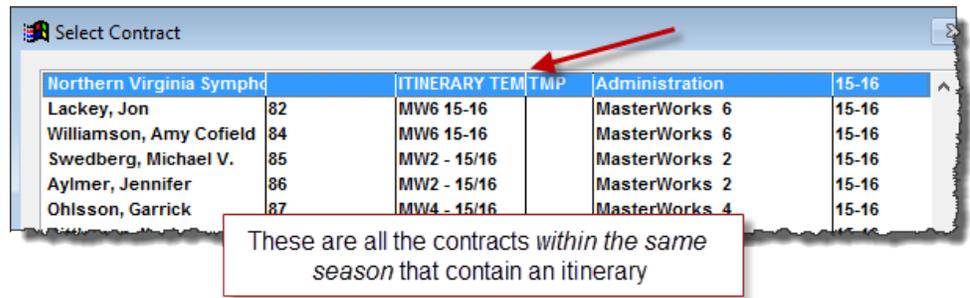
Click the **Function** icon at the top left of the OPAS application and choose **Copy Itinerary from...** and then **Start Function**

OPAS will confirm the selected contract that will receive the itinerary information. Click **OK**

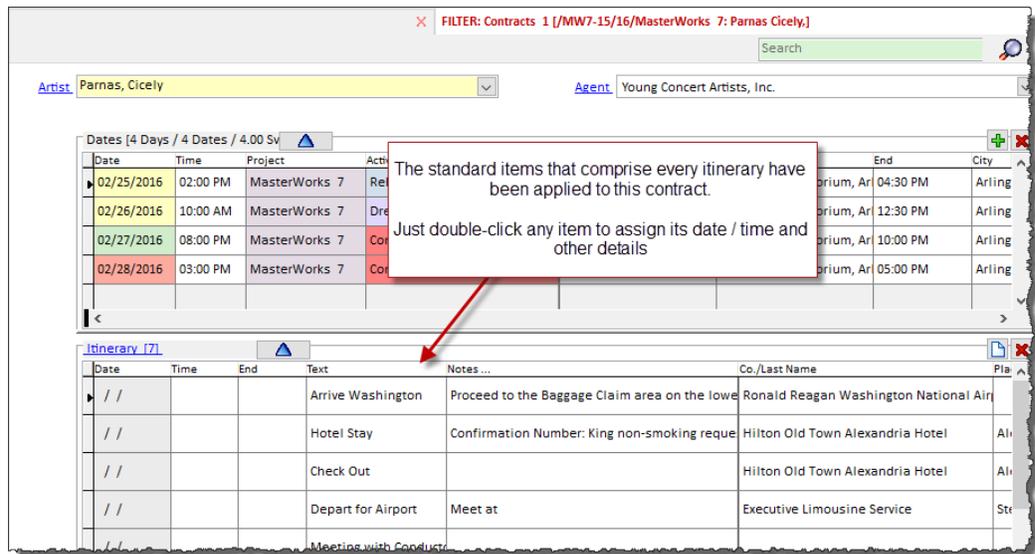
After confirming the number of contracts that will receive the itinerary, OPAS will display a list of all contracts within the same season that currently contain Itinerary items.



While any existing contract (in the same season) can serve as the source of your itinerary items, be advised that *all* details will be copied. So unless you are copying itineraries between artists appearing on the same Project, select the **Template** contract (see below):



After clicking **OK** and closing the function dialog, OPAS will have copied the itinerary items from your template to the active contract:



Now each itinerary item can be completed by double-clicking it and filling the date, time and other necessary details, or deleted if it is not needed for this contract.

Other itinerary items can also be added via the standard "New" icon at the top right of the grid.