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Emailing OPAS Reports

Many clients email finished OPAS reports as email attachments. This is a great solution as you are sending the email as finished document and the report retains all the formatting you intend. However, it has a disadvantage that the recipient has to open the attachment (which may be problematic if you receive emails on your phone), and you may have to worry about the report format. Most reports are docx files but you may need to convert them to PDF or rtf to make them truly universal.

With a change to your Microsoft Word toolbar, you can send the finished OPAS report as the email itself, rather than as an attachment.

⚠️ Note that all the functionality described in this guide pertains to Microsoft Word – Word is supplying the formatting, and the email is sent via Word to Outlook. We make no claims on how the email looks using other operating systems or mobile devices.
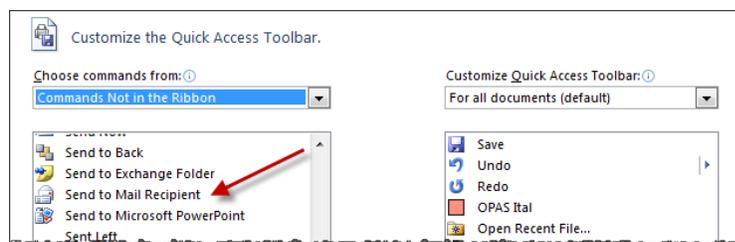
Modify Word – Option #1: the Quick Access Toolbar

Microsoft Word has an email feature that was removed from the main toolbar in recent editions of Word. The instructions for re-instating the feature that follow here are for Word 2010. Consult the Microsoft web site or perform an Internet search for "Microsoft Word Mail Recipient" for different versions of Word, or for more detailed instructions.

The first option for adding email functionality is to add it to the **Quick Access Toolbar** at the top left of the Word application. Click the **Customize Quick Access Toolbar** arrow and select "More Commands…"
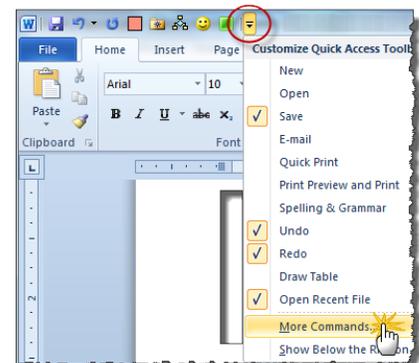
In the *left*-hand drop-down, select **Commands Not in the Ribbon** and then Send to Mail Recipient. In the right-hand drop-down make sure **For all documents (default)**.
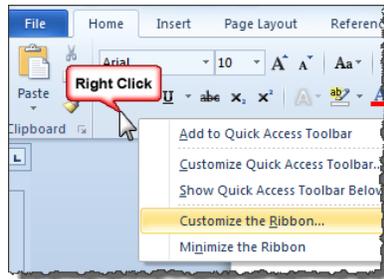

Click the **ADD>>** button in the middle of the dialog to move the "Send to Mail Recipient"

item to the Quick Access Toolbar. This adds the icon to the Toolbar where it can be used to email reports (see the next step):
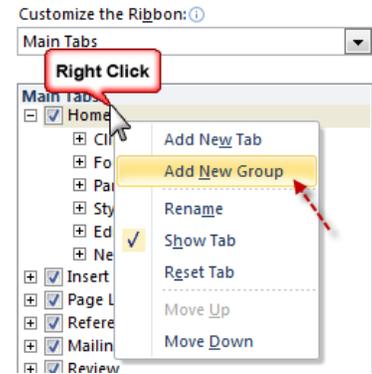
Modify Word – Option #2: the Ribbon

The Send Mail function can also be added to the Word **Ribbon** – the larger icons along the top of the Word application.


Right-click the Word Ribbon and choose **Customize the Ribbon…**

On the screen, **right**-click the Home section under **Main Tabs** and choose "Add New Group" (before adding a new item to the Home Ribbon, you must first create a custom or new group into which that item is placed):

After the new group is created, in the *left*-hand drop-down, select **Commands Not in the Ribbon** and then Send to Mail Recipient.

On the right-hand drop-down select **Main Tabs** and the **New Group (Custom)** you just created.
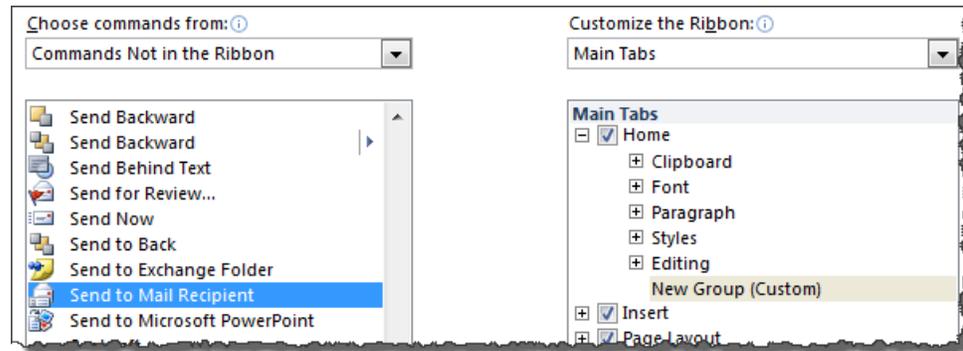
Click the **ADD>>** button in the middle of the dialog to move the "Send to Mail Recipient" item to the new group.

This puts a new icon at the far right of the Word Ribbon:

Create the Report

In OPAS, run the report to be emailed. This example is a report run from the Dates area. It prints a summary of a given Project which is emailed to all musicians marked "Present".

After the report opens, click the new **Mail Recipient** button created from the last step.

Most reports customized for this feature will have the email addresses and email subject programmed to appear at the top of the report. Cut/Paste those into the appropriate fields:
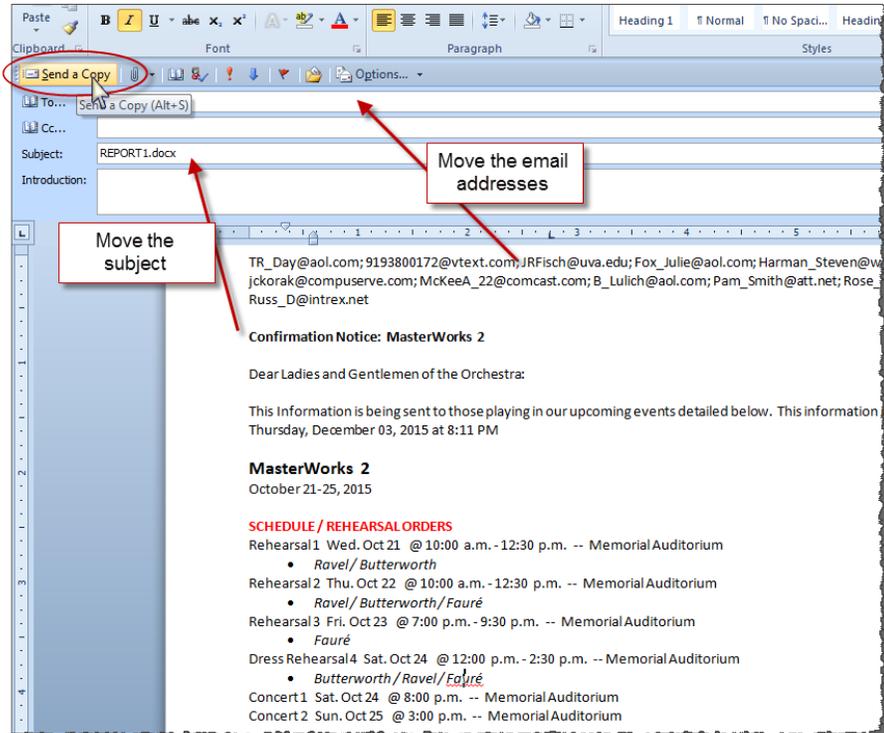
Finally, click the **Send a Copy** button (circled above) to send the formatted email.

When the email is received it appears as a formatted email:

When creating reports to be emailed, be sure to fully mock up a report with all the formatting and email to a variety of recipeints before you have the custom report written. This will ensure the report you have designed can be read by different email programs. Generally speaking it is best to avoid tables and more than one font family within the same report/email.