

OPAS

Outlook Export Report

This specialized OPAS report will output schedules from your organization's OPAS database into a format that can be imported to Microsoft Outlook calendars. Once the OPAS schedule information is in Outlook, it can then be synchronized with the Palm Pilot (and other PDAs) or viewed by your entire organization via the Outlook Exchange Server.

Important points regarding the Outlook Export Report

- This report does not constitute a link or a connection between OPAS and Outlook. You must manually take the information out of OPAS (via this report) and manually place it into Outlook (via the Outlook import tools). This document describes that procedure.
- The information flows only one way – changes to OPAS items in Outlook are *not* reflected back in OPAS.
- Because this is not a dynamic exchange of data between OPAS and Outlook, it is recommended that the export/import be executed strategically. Perhaps once a month for the month about to begin, or once a Season for concerts only.
- This procedure currently works **for Outlook 2000 and above only**. Contact Fine Arts Software for further information regarding Outlook 98.

Instructions

Step One – Run the OPAS Outlook Export report

In the OPAS Dates area, pull up any set of activities. This small example uses four events – two rehearsals and two concerts:

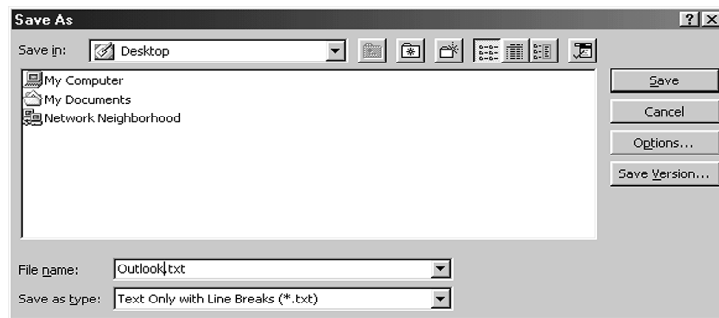
The screenshot shows a window titled "FILTER: Dates 1 [Fr, March 15, 2002, 01:30 PM : Rehearsal]". The window contains a table with the following data:

Date	Weekday	Start	End	Project	Activity	Venue	Conductor
03/14/2002	Th	10:30 AM	01:00 PM	Subscription Week 5	Rehearsal	Virginia Performing	DePriest, Jame
03/15/2002	Fr	01:30 PM	04:30 PM	Subscription Week 5	Rehearsal	Virginia Performing	DePriest, Jame
03/16/2002	Sa	08:00 PM	10:00 PM	Subscription Week 5	Concert	Virginia Performing	DePriest, Jame
03/17/2002	Su	08:00 PM	10:00 PM	Subscription Week 5	Concert	Virginia Performing	DePriest, Jame

With the activities displayed on the OPAS List screen, click the Report icon and choose the "Outlook Export" report.

Step Two – Save the report file

When the report finishes, it will open in Word like all other reports. However, this report is formatted in a way that is useful only to the Outlook import routine – *do not* try to reformat the report or



make any additions or edits to it. In Word, click the File | Save As... menu option. Save the file to an easily found temporary location such as your computer's desktop (the report file will be deleted after the import has finished).

NOTE: you *must* save the file in the format "Text Only with Line Breaks" as shown in the example here. Do *not* save the report as a Word document or as an rtf file.

Step Three – Rename the saved file

The report file that was created and saved in steps one and two must now be renamed so that it is in a format that can be read by Outlook. Find the report file that was saved, right-click on the file and change the file extension (everything to the right of the period) to csv. For example, if the report were saved as "Outlook.txt", you would rename it to "Outlook.csv". Windows will display a warning about changing the file extension, and you can click Yes on the warning screen. Note that the icon associated with the report will change once it becomes a "csv" file:



Note: "CSV" stands for "Comma-Separated Values". CSV files employ a standard and generic format that enables different computer programs to share data. You must manually rename the report from "txt" to "csv" only because Word will not allow a file to be saved directly to CSV format.

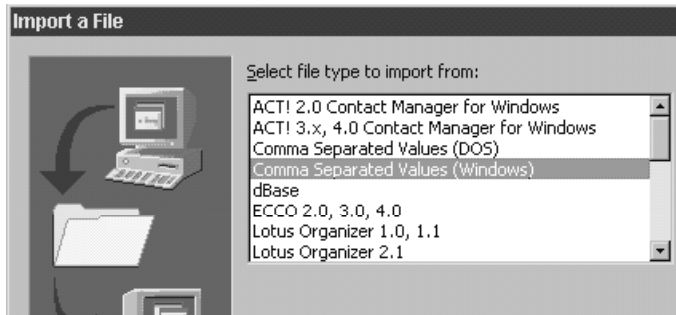
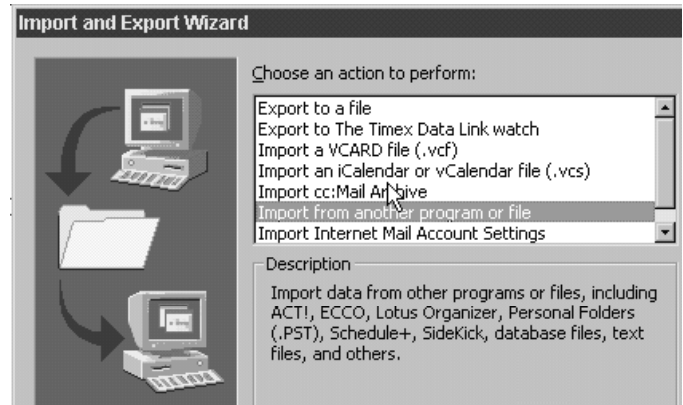
At this point, Microsoft Word should be closed.

- Step Four – Import the saved file into Outlook

Start Outlook 2000 and click on any of the Calendar icons in the left toolbar. An OPAS schedule can be imported to any of Outlook's calendar sections, including a shared calendar for your organization on the network.

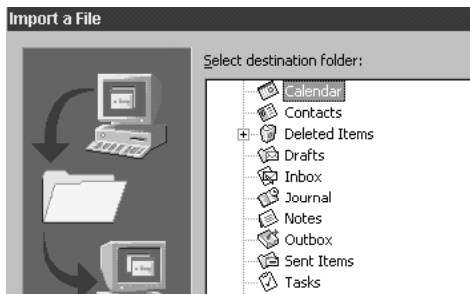
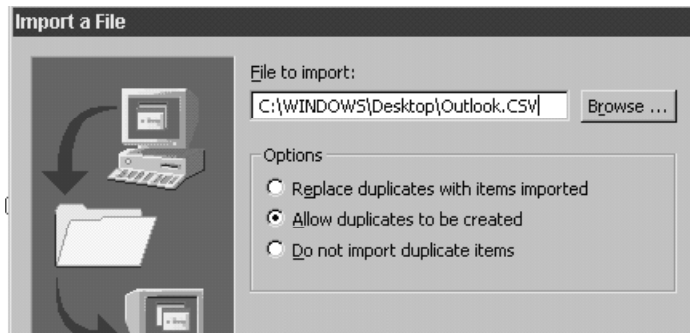
Click the File Menu item and then "Import and Export"

At the first screen, choose “Import from another program or file”, and click Next



At the next window, choose “Comma Separated Values (Windows)” and click the Next button.

The next window asks for the file to be imported. Click the “Browse” button at the top right of the window, and navigate to the file that was saved in Step Two. That file, and the path to it, should be displayed in the top, “File to Import” field of the window (as shown in this example). You must next select one of the three Overlap Options that Outlook should use - consult your Outlook documentation for more information on these three options. Click the Next button to move to the next screen.

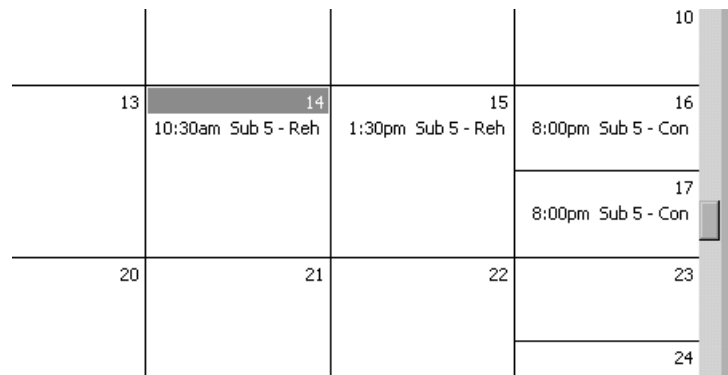


At the this window, select the destination Outlook folder for the OPAS schedule, if it is not already selected, and click Next.

The final Outlook Import window will verify the information to be imported. A check in the box indicates that Outlook has properly mapped the fields from the OPAS report and is ready to proceed. If you wish to manually check the data to be imported, click the Map Custom Fields button. However, there is no need to re-map any of the fields from the OPAS report. Click the Finish button and Outlook will import the information.

Viewing OPAS Schedule data in Outlook

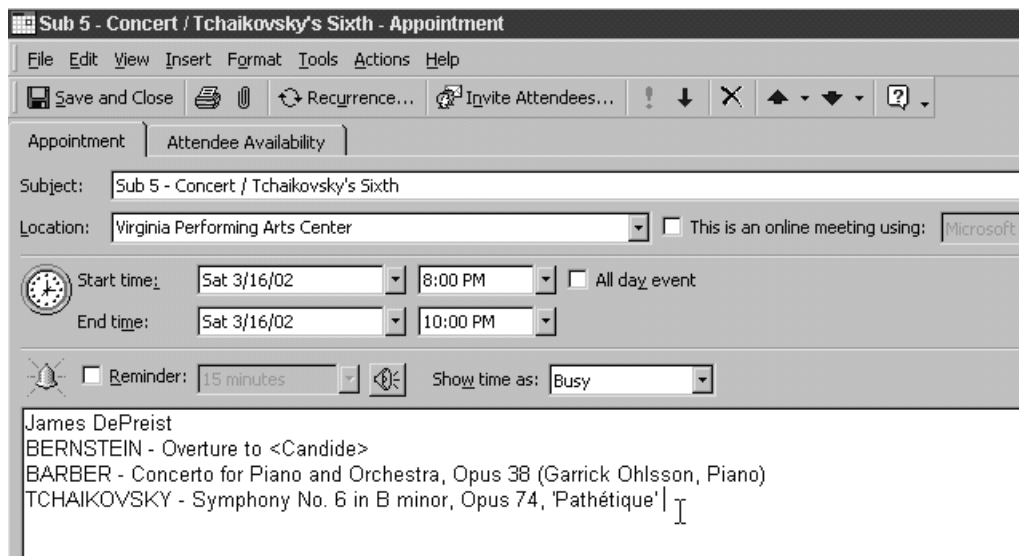
Outlook will now display OPAS schedule items in its calendar modes. This example shows Outlook's month view containing the four activities imported from OPAS.



			10
13	14 10:30am Sub 5 - Reh	15 1:30pm Sub 5 - Reh	16 8:00pm Sub 5 - Con
			17 8:00pm Sub 5 - Con
20	21	22	23
			24

Each OPAS activity has been imported as a separate Outlook appointment, and as such can be opened and viewed like other appointments. The information from OPAS has been assigned to Outlook as follows:

- **Subject** – the Subject line will contain the Project Code (if there is no Project Code, then the full Project Name is used), followed by the Activity abbreviation (again, if there is no abbreviation for the Activity, the full name is used). If the Activity has a title (recorded on the OPAS Program screen), then a “/” is printed, followed by the title.
- **Location** – the full Venue name is placed here
- **Start / End Date and Time** – OPAS uses the date, start and end times from the Main screen of the Dates program area.



Sub 5 - Concert / Tchaikovsky's Sixth - Appointment

File Edit View Insert Format Tools Actions Help

Save and Close Recurrence... Invite Attendees...

Appointment Attendee Availability

Subject: Sub 5 - Concert / Tchaikovsky's Sixth

Location: Virginia Performing Arts Center This is an online meeting using: Microsoft

Start time: Sat 3/16/02 8:00 PM All day event

End time: Sat 3/16/02 10:00 PM

Reminder: 15 minutes Show time as: Busy

James DePreist
BERNSTEIN - Overture to <Candide>
BARBER - Concerto for Piano and Orchestra, Opus 38 (Garrick Ohlsson, Piano)
TCHAIKOVSKY - Symphony No. 6 in B minor, Opus 74, 'Pathétique'

- **Description** – OPAS exports program information in this format:

Conductor Name
COMPOSER LAST NAME – Work Title 2 (Soloist Name, Instrument)

If there is no Title 2 for the work, then Title 1 is used. Intermissions are not indicated. Works are displayed in the same order in which they appear in OPAS; therefore if you take care to put works in the proper rehearsal order in the OPAS, they will appear that way in Outlook

Modifications and Customizations

This Outlook export/import report was specifically designed to make most changes easy and free of charge to clients. Examples of such changes would be:

- Inclusion of items in the OPAS “Other Participants” column
- Inclusion of Intermission
- Addition of information from the Dates area such as Dress code, Series, the Text or Notes field, and information from the Additional Data screen.
- Changes in format (such as in the way Composer, Work and Soloist names appear)

Other modifications are more complex and will require charges – contact Fine Arts Software for more information. Examples of these modifications are:

- Inclusion of instrumentation data
- Inclusion of Artist manager information
- Inclusion of information from the Contracts area (such as artist itinerary information)

The Outlook Function

In addition to the Outlook report, there is an OPAS-->Outlook Data **Function** that achieves the same goal, but in a slightly different method. The function creates the CSV file from OPAS directly which eliminates the bother of saving and renaming the file in Word, but the Function is not as customizable as the report.

Installing the Outlook Function

The function is installed by “unzipping” the file provided into the OPAS\PROGRAM folder on your server.

Individual workstations need to restart OPAS in order to see the function, but you do not need to restart the server.

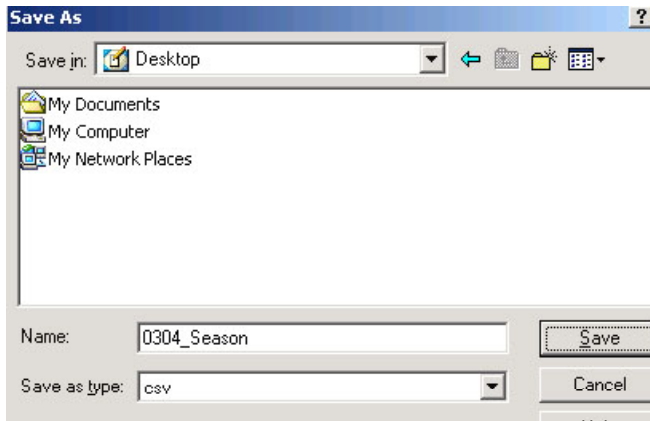
Running the Outlook Function

As with the OPAS --> Outlook report, isolate a set of activities on the LIST screen of the OPAS dates area.

To run the function, click the Function Icon - the little cog wheel at the top left of the screen, right next to the Report icon.

Select the Outlook Export function and click the large **Start Function** button

OPAS will prompt you for the location to which the export file should be saved. The file will be used only temporarily, so save it to a convenient location such as your computer desktop or My Documents folder. Click the **Save** button.



Note that OPAS will save the file as a CSV already - there is no need to open the file in Word first. Simply open Outlook and proceed with Step Four "Import the saved file into Outlook" as found on page two of this document.

Using the Outlook Function vs. the Outlook Report

The Outlook Report and the Outlook Function do essentially the same thing. The **Report** is used primarily:

- When you need to have several variations of the Outlook export (changes in data, format exc)
- You need a customized version of the export

The **Function** is used primarily:

- When the standard format is suitable
- When you are using Word XP or other programs that make it more difficult to convert or save the file in a plain TXT format