

Creating Project Templates

Project Templates reflect the basic patterns of rehearsals and concerts. These templates are then quickly put into any season using the **Copy Project from Template** function.

A Project Template is merely the pattern of rehearsals and concerts that a typical subscription or pops or education set follows. Orchestras tend to have several different templates based upon their individual needs and offerings. For example, your main subscription series may have a different pattern of rehearsals and concerts when your music director conducts as opposed to when he/she doesn't, or when you have run-out concerts, etc. There is no disadvantage to having many different templates.

Step One - create the Template Projects

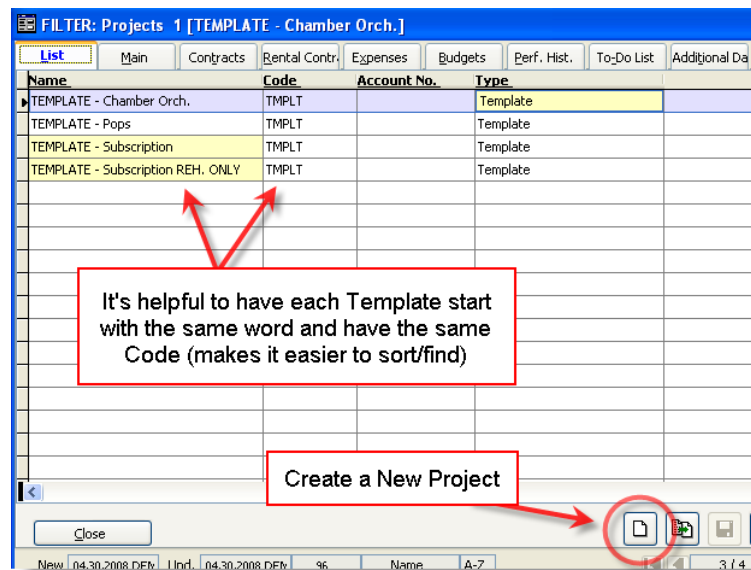
This step need only be done once for each distinct rehearsal and concert pattern; the same template can then be used over and over again in different seasons.

Open the **Projects** area

Choose **Main Data > Projects** and click the New icon in the lower right corner of the screen.



Give the Project a distinct **Name**. It is advised that you give all Template Projects the same code, for ease of searching and sorting. It can also help to start each Template Project with the word "Template" so that they appear together when sorted in a list.



You should create a **separate template for each distinct set of activities used by your organization** -- your subscription series, pops series, chamber music series, etc. Ensure that each set of activities is represented. For example, many orchestras have two or three possible rehearsal and concert combinations depending upon which day of the week they start and how many concerts there are -- each of these should be its own template.

Step Two - create the schedule of activities for each Template Project

Open the **Dates** area and create **New** activities

In the **Dates** area of OPAS, build the actual sequence of rehearsals and concerts for each of the Project templates created in step one. Schedule the rehearsals and concerts just as they exist in your season schedule; the idea is to build a representative week that reflects the Project in question.

Date	Start	End	H/Min	Svcs.	Week	Month	Year	PW	B	B3	Season
01.03.1900	We	02:00PM	04:30PM	02:30	02:30	1.00	00-01	1	1900		

For each of these:

1. The **Project** will be the appropriate **Template Project**
2. The **Activity** will be the rehearsal, dress rehearsal, concert, etc.
3. The **Date** will be *any date far in the past that does not correspond to an existing OPAS season*. The idea is to create each Template Project (a) In a year you can easily remember (we typically suggest 1900 simply because it's a round number) and (b) In a year far in the past -- before the start of your organization's activities. When placed in the distant past, Template Project activities would never mistakenly be included in a printed schedule or in data analysis reports (note in the picture above, OPAS does not assign a season). Remember the proper sequence of activities is more important than the actual date on which the activities start. In other words, if your rehearsals for a standard week begin on Tuesday, make sure they do so in your template, regardless of the calendar date of that Tuesday.
4. **Conductor** will be either blank or that of your Music Director
5. The **Venue** will be that of the most oft-used location for that activity
6. The **Orchestra** will be your orchestra

When this process is complete, you will have a single week or month in the same year (typically 1900), filled with all the different schedule patterns used by your organization.

As the illustration below shows, the activities that comprise templates will start to overlap as more templates are created, and that is fine. These activities won't ever be part of an actual schedule or season, they will just provide the basis on which the real schedule is built.

WeekDate	Start	End	PW Project	Activity	Conductor
Tu 01.02.1900	10:00 AM	12:30 PM	TEMPLATE - Subscription	Rehearsal	Hanson, Georg
We 01.03.1900	10:00 AM	12:30 PM	TEMPLATE - Subscription REH. O	Rehearsal	Hanson, Georg
We 01.03.1900	10:00 AM	12:30 PM	TEMPLATE - Subscription	Rehearsal	Hanson, Georg
We 01.03.1900	02:00 PM	04:30 PM	TEMPLATE - Subscription	Rehearsal	Hanson, Georg
We 01.03.1900	02:00 PM	04:30 PM	TEMPLATE - Subscription REH. O	Rehearsal	Hanson, Georg
Th 01.04.1900	10:00 AM	12:30 PM	TEMPLATE - Subscription	Dress Rehearsal	Hanson, Georg
Th 01.04.1900	10:00 AM	12:30 PM	TEMPLATE - Subscription REH. O	Dress Rehearsal	Hanson, Georg
Th 01.04.1900	02:00 PM	05:00 PM	TEMPLATE - Pops	Rehearsal	
Fr 01.05.1900	02:00 PM	05:00 PM	TEMPLATE - Pops	Dress Rehearsal	
Fr 01.05.1900	08:00 PM	10:00 PM	TEMPLATE - Subscription	Concert	Hanson, Georg
Fr 01.05.1900	08:00 PM	10:00 PM	TEMPLATE - Pops	Concert	
Sa 01.06.1900	03:00 PM	05:00 PM	TEMPLATE - Subscription	Concert	Hanson, Georg
Sa 01.06.1900	08:00 PM	10:00 PM	TEMPLATE - Pops	Concert	

In the **Artistic Planning** or **Dates** area, you can now use the **Create Project from Template** function to turn these templates into actual activities. See the **Artistic Planning** 'how-to' guides for more information.

The screenshot shows a dialog box titled "Create Project from Template" with the following fields and callouts:

- Source:** A dropdown menu showing "TEMPLATE - Pops". A red callout box points to it with the text: "Use this pattern or template ...".
- New:** A dropdown menu showing "Pops Series 3". A red callout box points to it with the text: "... to create this Project ...".
- Date:** A date field showing "05.01.2008" and a day dropdown showing "Th". A red callout box points to the date field with the text: "... starting on this date."