Applying a Project Plan to an Existing Project

Applying a Project Plan to an existing project is one of the biggest frustrations for teams that are starting to use the Project Plan to manage assignments and keep track of their progress. You may have a dozen books that are already consultant checked and some that have already been printed. Yet, when you or your administrator applies a new plan to your project, you find that you are unable to mark tasks as done for work that is already completed. The Stages Table provides a simple grid (below) that is supposed to make this easy, but as you will soon see, it doesn't work as expected.

With a single click, the administrator can check off all the tasks in a stage as being complete. Let's suppose that Genesis has already been consultant checked and printed. We want to mark all six stages as having been completed. We start by marking Drafting as complete:

Now all the tasks in the drafting stage have been marked as complete for the book of Genesis. Next, we can mark Team Checking as complete (At the time of this writing there seems to be a bug. You may have to click outside of the Assignments and Progress window and then back inside the window before you can mark the next stage as complete). After we do this for the first three stages in our sample project, we are suddenly blocked. In the image below, Paratext says that we have over 4,000 issues to resolve in Genesis before we can mark the consultant check as being completed!

This is where the frustration begins. Genesis has already been checked and completed in Paratext 7 a while ago, and the team does not have the time to go back over everything. What can they do?!

Fortunately, we have recently discovered a workaround to resolve this problem. It is the perfect solution for applying a project plan to a project that has existing text.

How to mark tasks complete for previous work

The reason that Paratext won't let you proceed is that the automatic checks have discovered problems that are supposed to be resolved before the stage can be marked complete. Often these are things like missing Biblical term renderings or unknown spelling status for words. You may, in fact, want to revisit these before your final publication, but not now! You just want Paratext to show the correct status for the book of Genesis, and any others that have been completed. The project administrator can bypass these error messages and correctly mark the completed stages in three simple steps:

1. Go to the Project Plan on the menu.
2. Paratext 8: Project -> Project Plan -> Checks tab
3. Paratext 9: Project -> Project Settings -> Project Plan -> Checks tab

Make a note of each check and the stage at which it is set to run. You can take a screenshot using PrtScn (Print Screen) and paste it into a Word document, or you can write it down on paper.

Once you have made note of all the settings there, set them all to "None":

Save the new settings by clicking the OK button.

Use the Stages Table to mark the completed stages for existing books

The stages table is found by clicking on the blue icon for Assignments and Progress and selecting Stages Table from the dropdown menu. You will now be able to use the Stages table to mark the actual stage of completed books. You will not receive any messages about errors in the text that need to be resolved.

Turn the automated checks back on

You must now set the automated checks back the way they were. Although the checks will continue to signal errors in the books that you have marked as complete, it will not undo the progress that you have marked. This is important. We don't want to hide any issues that may need to be resolved in the future. For now, your project's progress will be correctly indicated and you can address things like global spelling issues before the next publication.

1. Temporarily turn off automated checks
2. Use the Stages Table to mark the completed stages for existing books
3. Turn the automated checks back on