

**Purpose (Why):** To know how to setup and use a new project plan in Paratext.

## **Learning Objectives (What):**

1. The participants will know how to create a project plan from a base plan.
2. The participants will know how to modify a project plan
3. The participants will know how to configure task settings
4. The participants will know how to assign automatic checks to stages
5. The participants will know how to assign tasks and checks to team members.
6. The participants will know how to mark individual tasks as completed.
7. The participants will know how to generate reports.

## **Learning Tasks (How):**

[Paratext Project Plan Powerpoint](#)

### **Connection:**

#### **Introduction (slide 1-4)**

- Discuss why people are resisting the use of the project plan.
- Discuss the benefits of using the project plan.
- Review learning objectives
- Discuss Project Plan Overview

Ref:

[PPA 5.1 Introduction to Project Plans for Administrators](#)

### **Content:**

#### **Project Plan - Prerequisites (slide 5-8)**

- Review first things to consider
- Review basic inventories
- If you need to replace an old plan with a new plan, you will need to save a copy of your existing progress, so that you add the information to the new plan. [Here are the instructions.](#) Then you will need [to delete your existing plan.](#)

Ref:

[P8TC 1A.7 Character Inventory](#)

[P8TC 1A.7.1 Punctuation Inventory](#)

Project Plan – Setting up a plan (slide 9-34)

- Setting project scope
- Creating a project plan

Ref:

### [PPA5.2 Selecting and Applying Base Plans](#)

#### [Applying a base plan](#)

- Modifying a project plan

Ref:

#### [PPA5.2.1 Combining Tasks](#)

### [PPA5.3 Modify a Project Plan](#)

#### [Customizing the base plan](#)

- Configuring task settings

Ref:

#### [PPA 5.3.5 Verifying the Settings](#)

- Assigning checks to stages

Ref:

#### [PPA 5.3.6 Assigning Automatic Checks to Stages](#)

- Marking Progress to date

Ref:

#### [Bringing progress up-to-date](#)

Project Plan – Using the Plan (Slides 37-47)

What do we do next?

Are we there yet?

- Assigning tasks to the team

Ref:

### [PPA 5.4 Assigning tasks to team members](#)

- Marking tasks as completed

Ref:

#### [PPA 5.4.4 Marking Tasks as Complete](#)

### [P8TC 1.1 My Tasks](#)

Project Plan – View Progress (Slides 48-51)

- Team progress report
- Project health report

## **Challenge**

**Your Turn (Slide 35-36, 55)**

**Notes (Slide 52-54)**

## **Changes**

Project Plan Setup Summary, (Slide 56-59)

## **References**

[Setting up for Progress Tracking](#)