Setup Project Plan

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Introduction

“Progress tracking” based on a Project Plan and Assignments and Progress is a new feature in Paratext 8 that will impact the day-to-day work of translation teams.

Where are we?

Before you can add the plan the project must have been created/or migrated.

Why is this important?

The Project Plan feature allows the administrator to define a set of translation tasks that your translation project will follow. Paratext comes with sets of pre-defined plans from the various Bible translation organisations that you can use a starting point. However, every project is different and therefore after adding the base plan it will need to be modified for the team.

Typically, organizations want conformity at the “Stage” level in order to facilitate meaningful tracking of the progress of project across the entire organization. However, every plan will need to be customized at the task level.

If a task is important to you and your team and you want to track its progress, then it can be included in the project plan (even if it doesn’t require Paratext to do the task).

What are we going to do?

You will use a combination of two features: the Project Plan and the Assignments and Progress (sometimes referred to as “progress tracking”) to manage the plan by assigning team members to tasks, and tracking their progress in completing those tasks.

 Add the organizational base plan to the project (remove an old plan if necessary)
 Customize the plan for the team by adding/deleting and moving tasks
 Assign the tasks to the various team members.

Summary

This module shows you how to:

Add the organisational base plan

If you have an existing plan, you need to remove that plan before you can add another plan. (See below for instructions.)

 Project > Project plan settings
 Click Manage plans
 Click below Show Base Plan
 Choose your organisational base plan
 Click the Copy Plan arrow.
 Click OK.

The plan and its tasks are added to the project.

Remove current plan (if necessary)

If the project has an old plan, you need to delete each of the current stages before adding a new base plan.

 Project > Project plan settings
 Click Manage plans
 Click on the last stage
 Click the X to remove the stage
 Confirm you want to modify the plan.
 Confirm you want to delete the stage.
 Repeat for remaining stages
 Add the new plan (see above)

Configure – assigning checks to a stage

 From the Project menu, choose Project plan

 Click on the Checks tab
 For the desired check, drop down the list
 Choose the new stage or *none*

Configure - Reordering tasks / Move tasks to another stage

It is possible to reorder tasks and even move tasks to another stage. However, not all organisations permit this.
 From the Project menu, choose Project Plan
 Click the Stages / Tasks tab.
 Select the task you want to move.
 Click the up arrow or the down arrow to move the task to a different point with respect to the other tasks, or to move it to a different stage.
You may get a messages asking to confirm.
 Click OK.

Configure - Delete tasks

 Click on the Stage/Tasks tab
 Click on the task to delete

 Click the Remove Task button
 Click OK.

Configure - Assign tasks to team members

 From the Project menu, choose Assignments and Progress
 For the task to assign, click to dropdown the menu
 Choose the team member to assign
 Repeat as necessary
 Click OK.

Configure - Books to include

 Project > Project properties and settings
 Click the Books tab
 Choose the books that you want to track progress.
 Click OK

Copy a task from one project to another

Note: Follow the steps below to copy a task from the project plan for project ORIG (the "origin project") to the project plan for project DEST (the "destination project").
1. From the File menu, select Open Project/Resource.
2. Select project DEST and click OK.
3. From the Project menu, select Project Plan....
4. At the upper right of the dialog, click Manage Plans....
5. From the "Show Base Plan" drop-down, select the project plan for the ORIG project.
6. On the Current Plan side of the dialog (the DEST project side), click the row that has the task which you want to precede the added task. If you want the added task to be the first task in the stage, select the stage name.
7. On the Base Plan side of the dialog (the ORIG project side), hover over the task you want to add and click the solid arrow that appears. The task is copied to the project plan for the DEST project and becomes unavailable to be copied again to the project plan for the DEST project.
 Optional: To move the task, click the up arrow or the down arrow that appears when you hover over a task on the Current Plan side of the dialog.
 Click OK to close the "Manage Plans" dialog.
 Click OK to close the "Project Plan" dialog.
The copied task has the same name and progress rate as it had in the project plan for project ORIG.