

# **Paratext 8**

## **Supporters Manual (English)**

# **Paratext 8**

## **Supporters Manual (English)**

*Jenni Beadle*

*Matthew Lee*

# Contents

1 Introduction . . . . .	1
1.1 Goal . . . . .	1
1.2 Course Objectives . . . . .	1
2 IS: Install Paratext 8 . . . . .	2
2.1 Introduction . . . . .	2
2.2 Install Paratext 8 . . . . .	2
2.3 Register a Paratext 7 user (first time run Paratext) . . . . .	3
2.4 Manually updating your existing version of ParaTExt . . . . .	3
3 MD: Migrate Data . . . . .	4
3.1 Introduction . . . . .	4
3.2 Migrate Shared project . . . . .	5
3.2.1 Prepare a Paratext 7 project for migration . . . . .	5
3.2.2 Register a project (before migrating the project) . . . . .	6
3.2.3 Migrating a registered project . . . . .	7
3.3 Additional Project settings . . . . .	9
3.4 Migrate Non-shared project . . . . .	10
4 REG: Registration . . . . .	12
4.1 Introduction . . . . .	12
4.2 Register for Paratext 8 (with a Google account) . . . . .	12
4.3 Filling in the registration . . . . .	13
4.4 Register for Paratext with a non-google account . . . . .	14
4.5 Change your Paratext code . . . . .	14
4.6 Register a new user (who does not have an email address) . . . . .	15
4.7 Translation project by an unrecognised individual/organisation . . . . .	17
5 CP: Creating a new project . . . . .	18
5.1 Introduction . . . . .	18
5.2 Create a new project . . . . .	18
5.3 Name for the project . . . . .	19
5.4 Specify language . . . . .	20
5.5 Type of project . . . . .	22
5.6 Register the new project . . . . .	22
5.7 Editing your registration . . . . .	22
6 IR: Installing Resources . . . . .	24
6.1 Introduction . . . . .	24
6.1.1 Where We are . . . . .	24
6.1.2 Why is this Important . . . . .	24
6.2 Install resources – Internet (DBL) . . . . .	24
6.3 Installer resources – files . . . . .	25

7 PP1: Setup Project Plan . . . . .	27
7.1 Introduction . . . . .	27
7.2 Add the organisational base plan . . . . .	27
7.3 Remove current plan (if necessary) . . . . .	28
7.4 Configure – assigning checks to a stage . . . . .	29
7.5 Configure - Reordering tasks / Move tasks to another stage . . . . .	29
7.6 Configure — Add tasks . . . . .	30
7.7 Configure — Delete tasks . . . . .	30
7.8 Rename or edit tasks Renommer ou modifier les tâches . . . . .	31
7.9 Check the settingsVérifier les paramètres . . . . .	31
7.10 Configure - Assign tasks to team members . . . . .	32
7.11 Configure - Books to include . . . . .	32
7.12 Copy a task from one project to another . . . . .	32
7.13 Updating the project plan (for a migrated project) . . . . .	33
8 Setting up a project for success . . . . .	34
9 CV: Convert project . . . . .	36
9.1 Introduction . . . . .	36
9.2 To convert a project . . . . .	36
9.3 Changing the short name of the project . . . . .	37
9.4 Removing deleted files from the project history . . . . .	37
9.5 Clean up Paratext Live history . . . . .	38
9.6 Convert encoding to 65001 – Unicode (UTF8) . . . . .	38
9.7 Normalising – composed or decomposed . . . . .	38
9.8 Replacing old User names . . . . .	38
9.9 Convert the project . . . . .	38
10 CR: Cross-references . . . . .	39
10.1 Introduction . . . . .	39
10.2 Extract the references from the model text . . . . .	39
10.3 Check your scripture reference settings . . . . .	40
10.4 Check your Language Settings . . . . .	40
10.5 Insert Cross references . . . . .	40
10.6 Make your own xrf file . . . . .	41
Glossary . . . . .	42
Index . . . . .	43

# 1

## Introduction

---

### 1.1 Goal

The participants will perform various administrative tasks involved in installing Paratext 8 and migrating users and projects from Paratext 7 (including setup of the project plan).

---

### 1.2 Course Objectives

At the end of the course, the participant will be able to:  
Install Paratext 8

Migrate projects from ParaText 7

- Prepare a Paratext 7 project and its users for migration to Paratext 8
- Register users and projects
- Migrate shared and unshared projects from Paratext 7

Configure the Project Plan

- Add an organisational base plan
- Customise the plan
- Assign tasks

Configure the Project Plan

- Migrate both a shared and non-shared project

Convert a project

Create a new project

## 2

# IS: Install Paratext 8

---

## 2.1 Introduction

Paratext 8 is the result of a concerted effort to streamline the process of managing translation projects and accessing resources. As a result, both the data and the servers had to change. People wanted less hassle with registration and waiting for codes to be approved. They wanted access to more resources. They wanted a free version of Paratext that didn't need a license in order to use. Now we have that in Paratext 8.

*Where We are*

You may already have Paratext 7 installed and now want to install Paratext 8.

*Why is this Important*

Paratext 7 and Paratext 8 can both be installed at the same time but you need to understand the limitation of using them together.

- Both may be installed
- They use different data directories.
- My Paratext Projects (Paratext 7)
- My Paratext 8 Projects (Paratext 8)
- They use different data servers

*What are you going to do?*

You will install Paratext 8 (without uninstalling Paratext 7). You will also install an update from an MSP file.

---

## 2.2 Install Paratext 8

Note: you do not need to uninstall Paratext 7 or earlier. But you may need to uninstall an earlier version of Paratext 8.

- Double-click on the installer file.
- After you agree to the license terms, click **Install**.

*This step might take a few minutes if the installer needs to install the .NET 4.5 Framework on your computer.*

- If a dialog appears and asks for your permission, click **Yes** or provide the credentials as required.  
*The Destination Folder step appears.*
- Accept the defaults for the folder.

Note: Paratext 8 data may not share the same directory as Paratext 7 data.

- Click **Finish** and then **Close**.
- The first time you launch Paratext 8 you will need to enter your Paratext 8 registration code. Information on how to obtain this code is on the Registration page.

---

## 2.3 Register a Paratext 7 user (first time run Paratext)

All users need a new registration for Paratext 8.

- Run Paratext (for the first time)
- Choose the interface language.  
*A dialogue box is displayed asking for your registration code.*
- Go to <http://p8.paratext.org/registration>
- Log-in with a gmail work account
- Click on the Register link
- Type in the user name
- Type in the user's Paratext 7 registration code
- Copy the new code
- Return to Paratext
- Paratext will paste the code  
*Paratext is ready for use.*

---

## 2.4 Manually updating your existing version of ParaText

New update files have a .msp extension instead of PUD or SPUD as in the past.

- Make sure Paratext is closed.
- Double-click on the **msp** file to install the update.

# 3

## MD: Migrate Data

---

### 3.1 Introduction

Migration is the process of moving a project (including all settings files) from Paratext 7 to Paratext 8. This is similar to the process of setting up S/R for the first time in Paratext 7.x. Note: all users of a project have to migrate at the same time.

#### *Where We are*

You have already installed Paratext 8 and you have a Paratext 7 project that you want to use in Paratext 8.

#### *Why is this Important ?*

In order to get the full functionality of Paratext 8 your project needs to be migrated. Paratext 7 and Paratext 8 use different send/receive servers so there is no way for a project to be shared with some users on Paratext and some users on Paratext 8.

Users can have both Paratext 7 and Paratext 8 on their computers at the same time, and run one or the other, but no project can be shared simultaneously with users in Paratext 7 and other users in Paratext 8.

Once you have migrated the project, everyone on the team needs to get the migrated project, and only do work in Paratext 8 from then on.

You need to have a good Internet connection to migrate the project, but if you usually work without an Internet connection, you can keep working that way in Paratext 8 once the project is migrated.

#### *What are you going to do?*

To migrate a shared project:

- You must do a send and receive in Paratext 7 from all team members in Paratext 7 prior to migration to Paratext 8.
- Get the most authoritative data on one computer by doing send and receive between all the computers.
- One computer on the team initiates the migration
- The rest of the team gets the project in Paratext 8 via Send/Receive.
- Once the project is shared, all team members should only use PT 8 for that project from then on.

To migrate a non-shared project:



- Open the project
- Click Migrate

---

## 3.2 Migrate Shared project

If you administer a project that is shared in Paratext 7 and you want to migrate it to Paratext 8, this is how you need to proceed.

### 3.2.1 Prepare a Paratext 7 project for migration

All your users have to migrate at the same time.

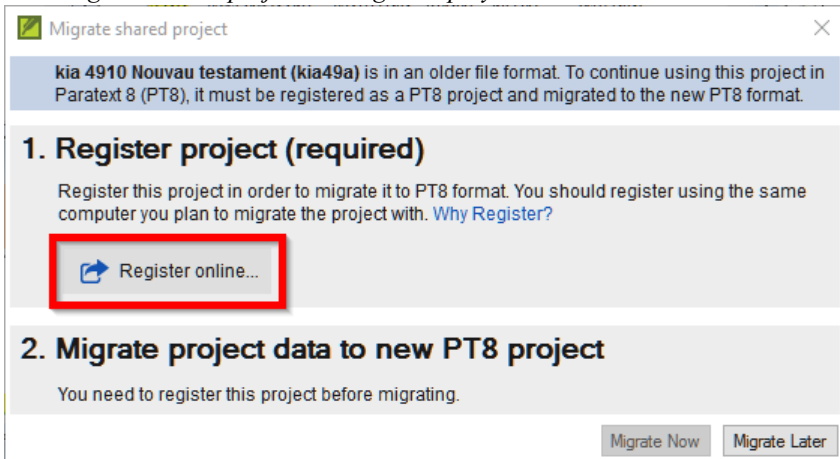
- All users must do send/receive **in Paratext 7** (then cease working in Paratext 7).
- The Administrator then confirms that the text is in a good state.
- The Administrator then loads **Paratext 8**.
- **File > Open Project/Resource**
- Click the box at the bottom left to show Paratext 7 projects

☒ Show Paratext 7 projects

- Choose the project to migrate.  
*It will likely be described as “v7, unregistered.”*

Some active Paratext 7 projects have been registered already for Paratext 8. If yours is one of them, Paratext 8 will show the project as P7 but show it as registered. You can skip the registration step we’ll show you if your project is already registered.

- Click **OK** to start Migrating the Project.  
The 'Migrate shared project' dialog is displayed.



*Paratext 8 may tell you the project must be registered (if it is not preregistered) and it must be migrated to Paratext 8.*

### 3.2.2 Register a project (before migrating the project)

- Click the **Register online** button
- Fill in the web form. (Fields with an asterisk [red star] are required.)
- Short name: You cannot change the project short name,
- Long project name: You can change the long project name.
- Paratext 8 requires a language identifier for your language. Use the search in the language name to find the ethnologue code for your language. You can modify the language name, or use the “advanced” to specify or create additional information about the language.
- Scope refers to whether the project will be a complete Bible, or complete Bible including apocrypha, or New Testament, or some other grouping of books. You can add more books to your project scope later as this can be changed after registration.
- Translation type refers to whether it is the first translation for this language, a revision of an existing translation, or a new translation, or a translation including study materials, such as a study Bible. For a revision, you have to specify that you have permission from the rights holders of the translation you are revising.
- Specify the country where the language is spoken. You can type a few letters of the name then pick the desired country. You can specify more than one country if the language spreads across borders

- The rights holder would be the organization you expect will have the copyright for a print edition. This too can be changed if it needs to be later on.
- The last four fields allow you to add more information if it is relevant for describing your project. (None of these are required.)
- You can mark if your project is confidential or not. Only Paratext 8 registered users can view the name of standard projects, a confidential project will be hidden even from other Paratext 8 users.
- Another option is to mark a project as a test or training project. You can use this option for test projects you create, or for projects you use for practice in a training course.
- The last requirement to register is stating that you agree to follow the FOBAI guidelines in your translation project, and you agree to store a backup copy of your project in the Digital Bible Library.

The Digital Bible Library is a tool for making translations available online or for mobile users, but your project will not be available to anyone until you agree to make it available.

- To submit the registration, click **Submit**.  
*The registry should tell you that the project registered successfully. (You may need to scroll to the top of the page to see this).*

✔ Project successfully registered and available in Paratext. Click [Edit](#) to complete project details. ✕

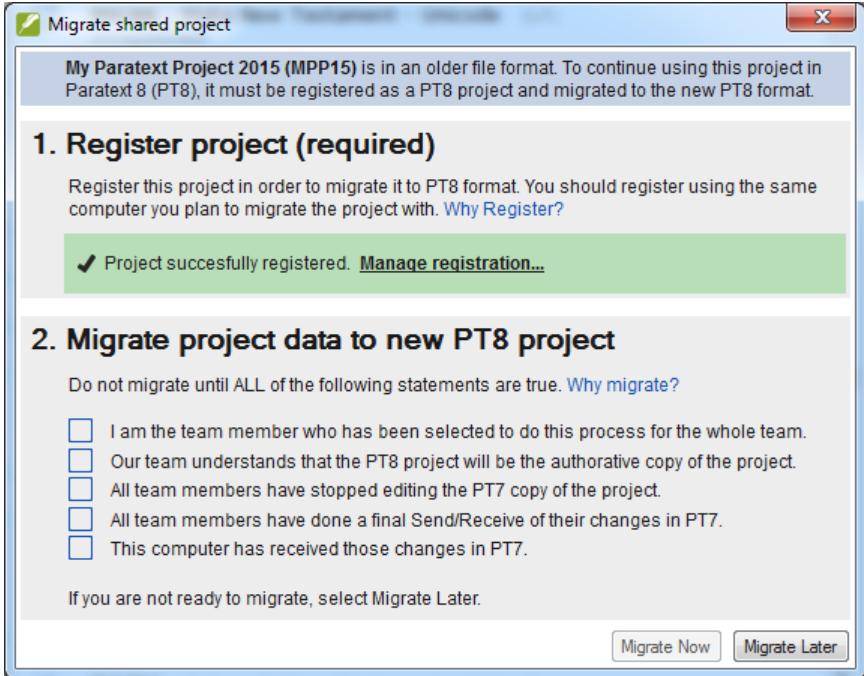
Or Click **Migrate later** to back out of migrating and finish your preparations.

When you are ready, go through the migration again. Clicking “Migrate later” will not cancel the project registration if you just submitted it, you can skip the registration steps and go on to migration

### 3.2.3 Migrating a registered project

- Go back to Paratext.

*It should detect that the project is now registered, and inform you of that.*



- The migration step has several boxes you have to check off to verify that you understand what is involved.
- Put a **check** in these boxes if they are true, then click **Migrate now** to proceed.

If you need to do something else before you are ready to migrate, click “Migrate Later,” and go finish your preparations.

When you click “Migrate now,” Paratext will copy the project from your Paratext 7 into your Paratext 8, and will also do a send/receive to the Internet.

Now your colleagues can go to **Paratext 8** and do a **Send/Receive** to receive the migrated project.

If they do not have an Internet connection, you can do a send/receive to USB or a network folder, and they can receive the project into Paratext 8 that way.

Si elles ne disposent pas d'une connexion Internet, vous pouvez faire un envoyer / recevoir vers USB ou un dossier réseau, et ils peuvent recevoir le projet dans Paratext 8 de cette façon.

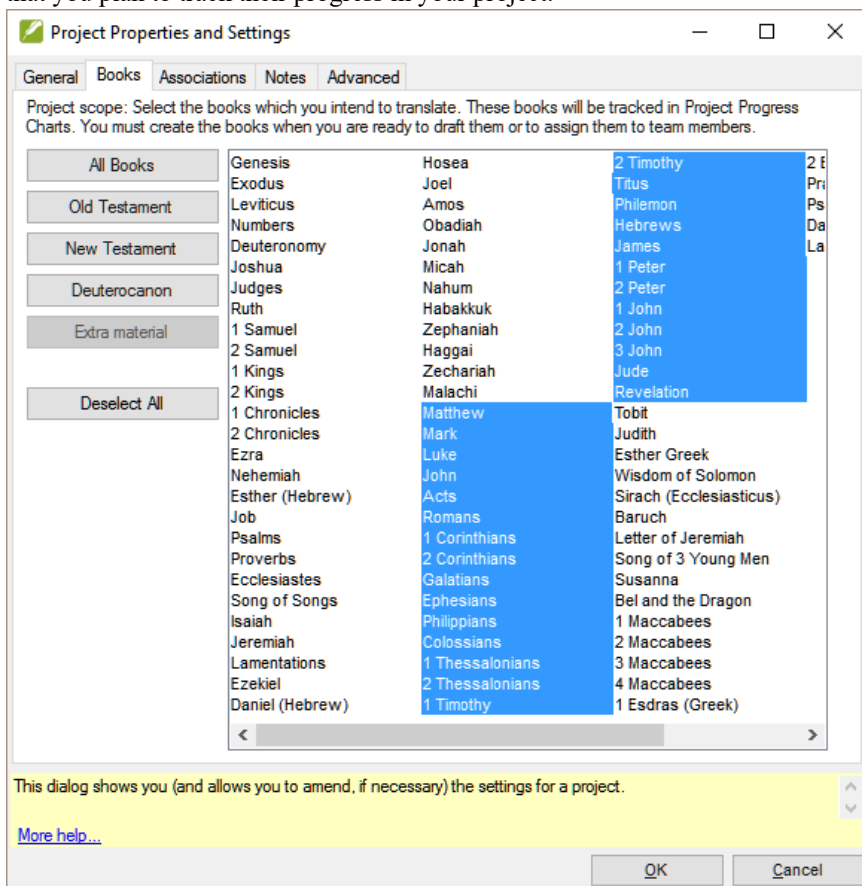
---

### 3.3 Additional Project settings

- **Language identifier:** After you click “Migrate now”, Paratext 8 may tell you that need to specify a language identifier for your project.

You can verify what the language name and language identifier are for your project by going to **Project > Project Properties and settings**, and looking at the **language settings**. The language identifier is in brackets after the language name.

- **Books** The project properties and settings has a “Books” tab, you specify here the books that you plan to track their progress in your project.

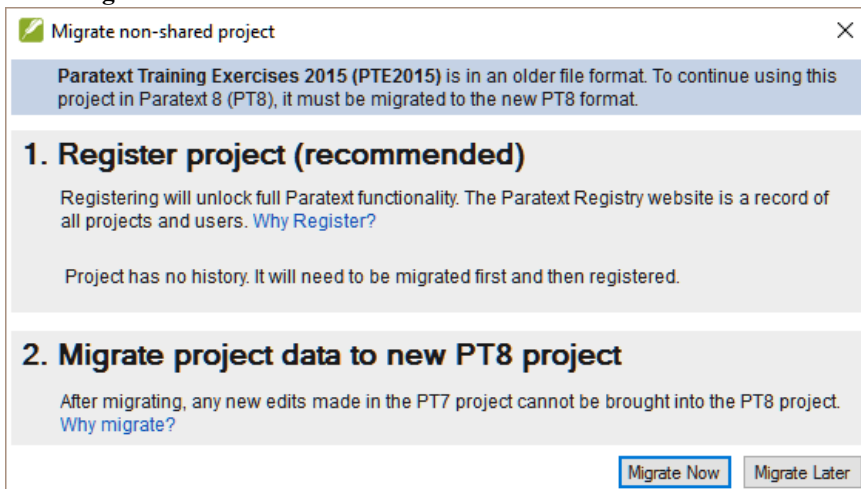


You can choose book by book, or specify **Old Testament**, **New Testament**, **Deuterocanon** by using the buttons. You can change this list of books later on in the project if your plans for the project change.

### 3.4 Migrate Non-shared project

If a project was not shared in Paratext 7 then you do not have to register it in order to migrate.

- **File > Open Project**
- Click “**Show Paratext 7 Projects**”
- Choose the desired project
- Click **Migrate Now**



*When you click “Migrate” the project will be migrated to the Paratext 8 folder and ready to be used. The registration status will determine what functionality exists for the project.*

Note: Non-shared projects don't have to be registered but it is recommended.

Remember, no one should edit the project anymore in Paratext 7. That would be wasted effort as no one else will see their changes. To help your team members remember this, you could have them remove the project from their Paratext 7 once they have gotten it in Paratext 8. Or maybe they can uninstall Paratext 7 from their computer if they don't need it for other projects.

# 4

## REG: Registration

---

### 4.1 Introduction

Starting with Paratext 8 it is a requirement that projects share their basic metadata information with the translation community. It is strongly encouraged that they share progress information [some organizations and/or donors may require this].

*Where We are?*

Paratext 8 has been installed on your computer and you have the Paratext 7 registration codes for your team members.

*Why is this Important?*

In Paratext 8 both users and projects should to be registered. Access to specific text resources, e.g. TEV, is determined by what organization you are a part of

Projects may be registered by the administrator (or a consultant serving as an administrator)

Other organizations/users are notified and may object to BoG. Basic project metadata information is available to all in ParaTExt community

If your project is not registered you will not have access to

- Interlinearizer
- Internet Send/Receive
- Statistical glossing tools (guess translation)
- Print Draft

*What are you going to do?*

- You will register a P8 user
- You will register a new P8 project
- You will see what information is displayed in the ParaTExt Registry for a registered project.



---

## 4.2 Register for Paratext 8 (with a Google account)

- Go to [registry.paratext.org](http://registry.paratext.org) in your web browser.  
*The “Sign in” screen is displayed.*
- Enter your email account.  
*The site will check if your account exists, and if it is on a Google server, you will have the choice of authenticating with Google.*
- Choose to authenticate with Google  
*A new screen is displayed asking for your password.*
- Enter your **Google account password**.
- Click **yes** to authorize the Paratext site to use your profile information.  
*You are then ready to start filling in your Paratext registration.*

If you do not have a Google address, see section 4.4)

---

## 4.3 Filling in the registration

- Click the appropriate circle to choose your **registration type** (new registration, previous Paratext 7 registration, or previous Paratext 8 registration).
- Choose your **organization** from the list, or if you are not a member you can leave this blank.

Anyone can register to use Paratext, but people who are not members of a translation organization and who are not members of a registered project will not be able to use all the features of Paratext and will have access to only a few resources.

- Select your **country**.
- Enter if relevant your **field entity and your supervisor**
- Explain **why** you want to use Paratext.
- Check the box at the bottom if you want to get email announcements about Paratext updates and news.
- When finished, click “**Register**”  
*The server will give you a code. It will also send this to your email.*

Keep that email, or to the code that is displayed here, because if you lose it, there is no way to look it up again. (This is a security feature, user codes are not stored on the server so they cannot be stolen if someone hacks onto the server)

---

## 4.4 Register for Paratext with a non-google account

- If your email account is not on a Google server, or if it is but you choose to not use Google to authenticate, the registry server will ask you to enter a password.

This does not have to be your email password, you can choose a different password for your Paratext registration.

- Enter the password you want to set up
- Enter it again as a confirmation  
*The server will send an email to your account with a link to verify.*
- Open your email, go to the link, and proceed to register for Paratext (see above).

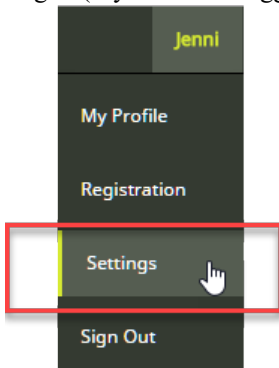
---

## 4.5 Change your Paratext code

(Generate a new code)

There are many reasons why you may need to change your Paratext code, but mainly if your computer is stolen.

- Go to the registration website, [registry.paratext.org](https://registry.paratext.org).
- Log in (if you are not logged in) Log in (if you are not logged in)



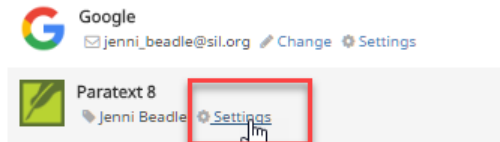
- Click on your user name at the top left.

- Click on **Settings**.

## Settings

### Services

Your account is connected to the following apps and services:



- Beside Paratext 8, click '**Settings**'. Beside Paratext 8, click '**Settings**'.  
*The registration Details screen is displayed.*
- Click on the **Generate button** to generate a new code Click on the **Generate button** to generate a new code



*The code will be sent to your email address.*

- Start Paratext  
*If it connects to the Internet it will detect that the old code is no longer valid, and it will ask you to update your registration info.*
- Go to your email, and copy the new code.
- Go back to Paratext  
*It may already have pasted in your new code.*
- If it has not, paste in the new code into the registration form, and click OK.  
*You should be reregistered.*

You will need to do this on any other computer that you have Paratext installed on as well.

If Paratext is not connecting to the Internet to detect that you need to give a new code, go to

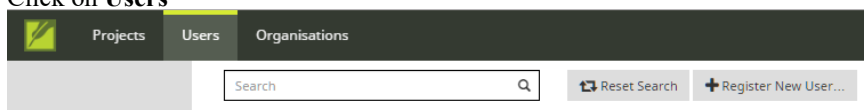
- **Tools > Registration Information** and paste the code there.

---

## 4.6 Register a new user (who does not have an email address)

Any administrator of a registered project can create new user registrations if they need to add people to their project. These users do not need to have an email address.

- Go to [registry.paratext.org](http://registry.paratext.org)
- Log in if you are not already.
- Click on **Users**

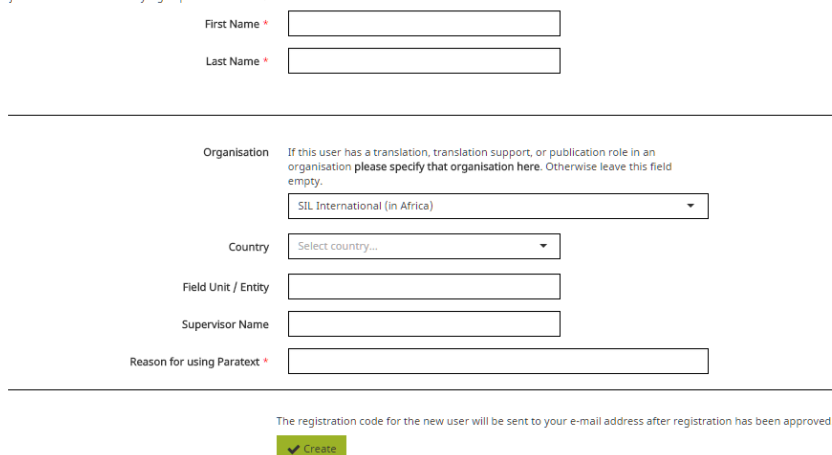


The screenshot shows the top navigation bar with three tabs: 'Projects', 'Users' (which is highlighted with a yellow background), and 'Organisations'. Below the tabs is a search bar with the placeholder text 'Search' and a magnifying glass icon. To the right of the search bar are two buttons: 'Reset Search' and '+ Register New User...'. The 'Register New User...' button is highlighted with a green background.

- Click the “+ Register new user” button.  
*The new user registration form is displayed.*

### New User

Use this form to create a registration for a user who does not have an e-mail address. The user will be able to participate in projects and use resources, but cannot register projects of their own until they sign up for themselves.



The 'New User' registration form contains the following fields and sections:

- First Name \***: A text input field.
- Last Name \***: A text input field.
- Organisation**: A section with a description: "If this user has a translation, translation support, or publication role in an organisation **please specify that organisation here**. Otherwise leave this field empty." Below this is a dropdown menu with the selected value "SIL International (in Africa)".
- Country**: A dropdown menu with the placeholder text "Select country...".
- Field Unit / Entity**: A text input field.
- Supervisor Name**: A text input field.
- Reason for using Paratext \***: A text input field.

Below the form fields, there is a line of text: "The registration code for the new user will be sent to your e-mail address after registration has been approved." followed by a green button with a checkmark icon and the text "Create".

- Fill in their name, and the rest of their information.
- You do not need to supply their email address.

A user added by someone else cannot be made an administrator of a project, nor a consultant. If you would like to make someone a consultant or administrator they can register themselves for Paratext, then you can add their name to the project.

- When completed, click “**Create**”  
*The server should respond by e-mailing you the user code for the new user.*

Hang onto this code, because it cannot be recovered again if you lose it.

---

## **4.7 Translation project by an unrecognised individual/organisation**

- If a translator is not part of a recognised organisation, she can apply to the BoG (board-ofgovernors@paratext.org) to be members of "Independent Translators" pseudo organization

It is unclear how many text resource owners will grant access to this group

# 5

## CP: Creating a new project

---

### 5.1 Introduction

In this module you will create and register a new project.

*Where We are*

You have already installed Paratext and registered a user.

*Why is this Important*

A new aspect in Paratext 8 is that projects need to be registered as well as users. This may feel like an extra complication, but it does offer benefits to users.

As we saw in the user registration section, the project administrator can create registrations for users they want to be part of their project.

*What are you going to do?*

We will create and register a new project.

## 5.2 Create a new project

- **File > New Project**

*The New project dialog is displayed.*

Project Properties and Settings

! Incomplete tab(s): General

General Books Associations Notes Advanced

Full Name: My Paratext Project 3

Short Name: MP3 Edit... 1

Copyright:

Language: 2

Edit/View... New... Language Settings...

Versification: English 3

Type of Project: Select project type 4

Based on: 5

Registration: Project type must be selected before project can be registered.

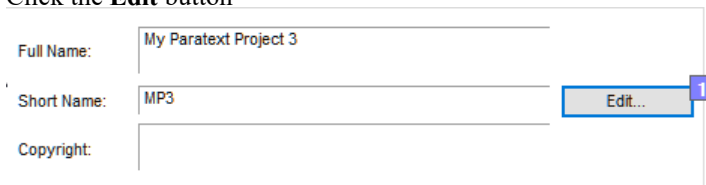
This dialog shows you (and allows you to amend, if necessary) the settings for a project.

[Aide supplémentaire](#)

OK 8 Cancel

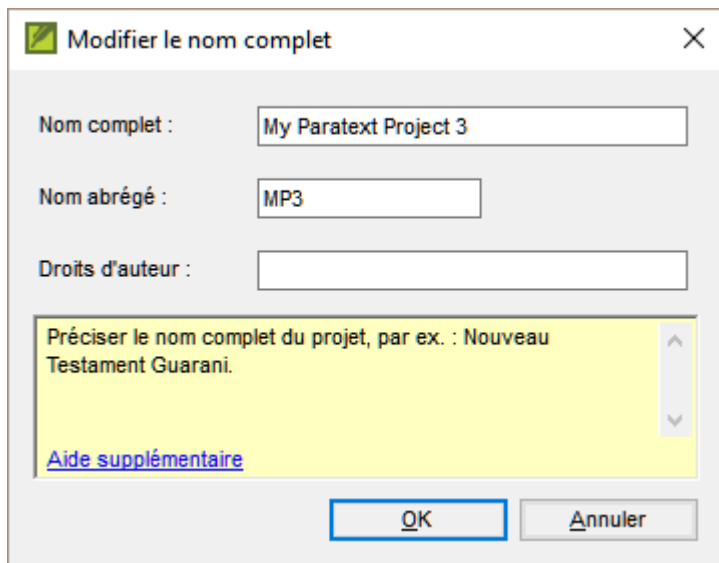
## 5.3 Name for the project

- Click the **Edit** button



A screenshot of a dialog box for editing project information. It contains three text input fields: 'Full Name' with the value 'My Paratext Project 3', 'Short Name' with the value 'MP3', and 'Copyright' which is empty. To the right of the 'Short Name' field is a button labeled 'Edit...'. A blue square with the number '1' is placed over the 'Edit...' button, indicating it should be clicked.

*The “edit name” dialog is displayed*



A screenshot of a dialog box titled 'Modifier le nom complet' (Modify full name). It has a close button (X) in the top right corner. Inside, there are three text input fields: 'Nom complet :' with the value 'My Paratext Project 3', 'Nom abrégé :' with the value 'MP3', and 'Droits d'auteur :' which is empty. Below these fields is a yellow text area containing the text 'Préciser le nom complet du projet, par ex. : Nouveau Testament Guarani.' and a blue hyperlink 'Aide supplémentaire'. At the bottom are two buttons: 'OK' and 'Annuler'.

- In the name section, give the project a name and a matching short name.

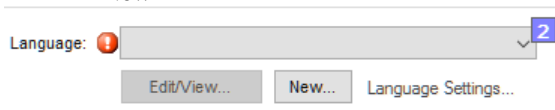
Once you create a project name, the short name cannot be changed, because this is the name Paratext will give to the folder containing the project files, and also the name given to the project on the Internet server.



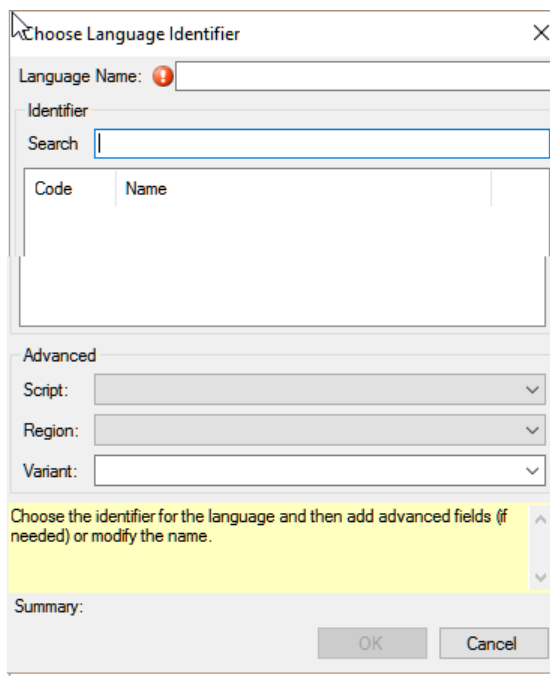
---

## 5.4 Specify language

- If you have another Paratext project in the same language, you can just pick the language from the list in Paratext [2]. If not, you will need to create a new language.
- Click on **New**



*The Choose language identifier box is displayed.*



- Click in the **Search** box
- Start typing the name of your language  
*Paratext will display matching names.*
- Click on your language in the list.  
*Paratext will add the language name.*

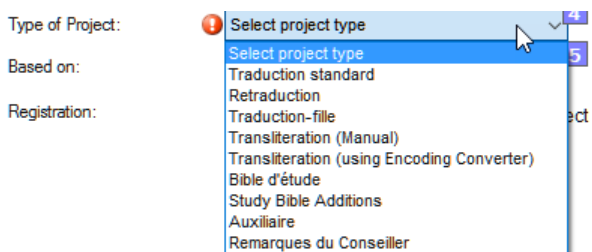
- Click **OK**.

You can also specify additional information if needed in the “advanced” section of the language settings dialog.

---

## 5.5 Type of project

- Click the drop-down list beside “Type of Project”



- Choose the appropriate type for your project.

If it is a back translation, or a daughter or transliteration project, you will need to define the source.

---

## 5.6 Register the new project

- Make sure you have given the project a name and chosen the project type.
- Click **Register online** to go to the registration page
- Fill in the information (see above)
- Click **Register** to submit.  
*Paratext should "automagically" detect that the project is now registered,*
- Click **OK** to create the new project.

---

## 5.7 Editing your registration

As you work in your project, you can change your registration information later on.

- From Paratext, make sure you are connected to the Internet,
- **Project > Project Properties and settings**
- Click the “**Manage registration**” link.

*This will bring up the project registration info and you can edit it. Any project administrator can edit the registration info.*

# 6

## IR: Installing Resources

---

### 6.1 Introduction

In this module you will learn how to install resources.

#### 6.1.1 Where We are

You have already installed Paratext 8 and registered a user.

#### 6.1.2 Why is this Important

In Paratext 8, the resources are downloaded from the DBL (Digital Bible Library). Each user can download them directly, but if your Internet connection is limited, you can share the downloaded files with other users.

*What are you going to do?*

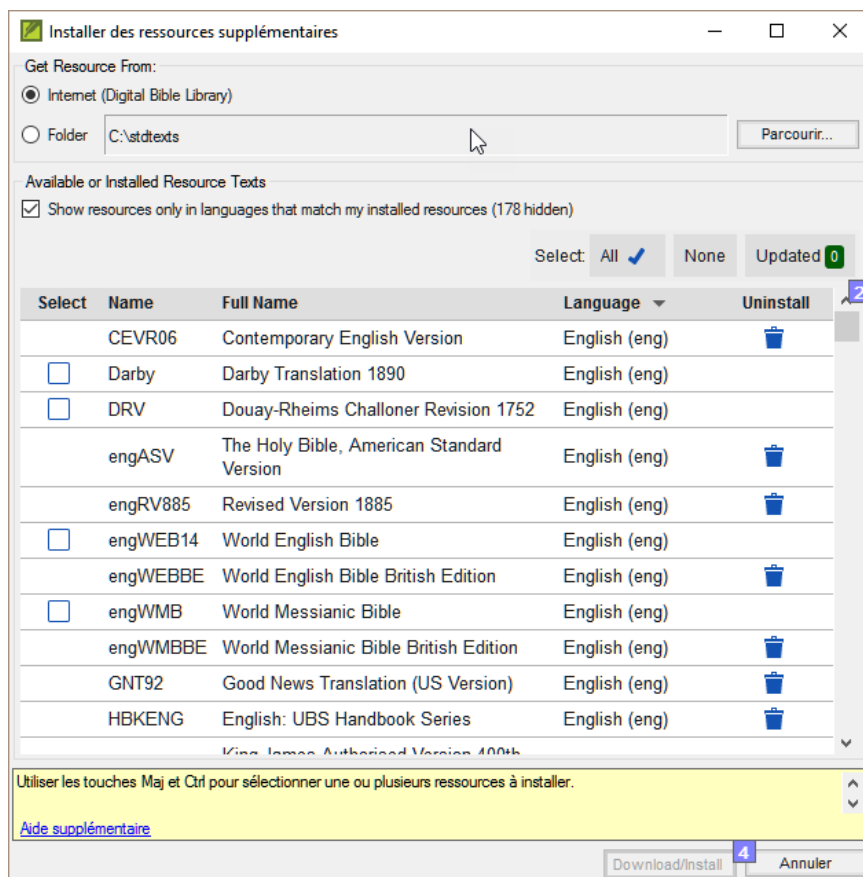
- Download resources from the Internet
- Install resources from a file.

---

### 6.2 Install resources – Internet (DBL)

- From the **File** menu, choose **Download/Install resources**.

*A dialogue box is displayed*



- Make sure Internet has been chosen.
- Click the check boxes to the left of the desired resources.
- Click **Download/Install**

## 6.3 Installer resources – files

- From the **File** menu, choose **Download/Install resources**.  
*A dialogue box is displayed*
- Click **Folder**
- Click **Browse**.

- Go to the folder which contains the downloaded resource files.
- Select the desired resources.
- Click **Download/Install**

## PP1: Setup Project Plan

---

### 7.1 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 We are*

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 you 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.

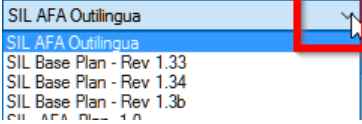
---

### 7.2 Add the organisational base plan

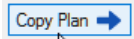
If you have an existing plan, you need to remove that plan before you can add another plan. (See below for instructions.)

- **Project> Project plan settings**
- Click **Manage plans**
- Click below **Show Base Plan**

**Show Base Plan:**



- Choose your organisational base plan
- Click the **Copy Plan** arrow.



- Click **OK**.

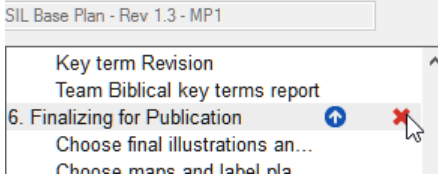
*The plan and its tasks are added to the project.*

## 7.3 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

**Current Plan:**



- \*\*\*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)



## 7.4 Configure – assigning checks to a stage

- From the **Project** menu, choose **Project plan**
- Click on the **Checks** tab

Project Plan: MP1

Project Plan: SIL Base Plan - Rev 1.3 - MP1

Manage Plans...

Stages / Tasks **Checks**

Select the first stage where each check is done. It will automatically be done in all following stages.

**Basic Checks**

Chapter/Verse Numbers	Drafting	Capitalization	Team Checking
Markers	Drafting	Repeated Words	Team Checking
Characters	Team Checking	Unmatched Pairs of Punctuation	Preparing for the consultant
Punctuation	Team Checking	Quotations	Preparing for the consultant
References	Preparing for the consultant	Numbers	Preparing for the consultant

**Spelling**

Unknown spelling status	Preparing for the consultant
Incorrect spelling status	Preparing for the consultant

**Unresolved Notes**

Project (À effecteur)	Team Checking
Project (Conflict)	Team Checking
Spelling Discussion Notes	Preparing for the consultant

**Other**

Parallel Passages	Finalizing for Publication
Interlinear glosses approved	*None*
Biblical Terms renderings found	Preparing for the consultant

**Back Translation**

Missing Verses (MP1bt)	Preparing for the consultant
Out of Date Verses (MP1bt)	Preparing for the consultant
Missing Verses (mp1bt2)	*None*
Out of Date Verses	

OK Cancel

- For the desired check, drop down the list

Drafting

\*None\*

Drafting

Team Checking

Preparing for the consultant

Consultant Check

Review by the community

Finalizing for Publication

- Choose the new stage or \*none\*

## 7.5 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**.

---

## 7.6 Configure — Add tasks

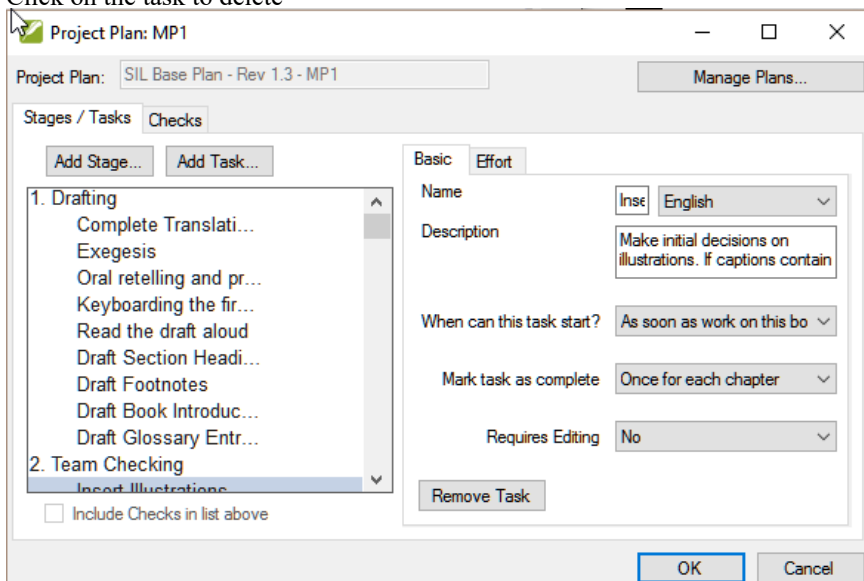
- Click on the task quick is above the new task.
- Click on the **Add task**
- Type the name for the task and a description.
- Click **OK**

---

## 7.7 Configure — Delete tasks

- Click on the **Stage/Tasks** tab

- Click on the task to delete



- Click the **Remove Task** button
- Click **OK**.

## 7.8 Rename or edit tasks Renommer ou modifier les tâches

- Click on the task (in the list on the left)
- Click on the name box (in the pane on the right)
- Type a new name for the task
- If necessary, edit the description.

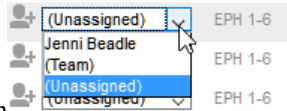
## 7.9 Check the settings Vérifier les paramètres

- There are three settings to check
- how do you to mark the task as complete (once for each chapter, book or project)
- when can the task begin (anytime, or wait for another task ...)
- do you need editing permission (if so, which project)

---

## 7.10 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**.

---

## 7.11 Configure - Books to include

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

---

## 7.12 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.*

### 7.13 Updating the project plan (for a migrated project)

For projects that have already completed a number of stages at the time of switching to Paratext 8 the Tasks table view and/or the Stage table view of Assignments and Progress can be helpful in marking multiple books, stages or tasks, complete.

- Click on your project.
- From the **Project** menu, choose **Assignments and Progress**.
- Choose Stages table view.

	Drafting (10 Tasks)	Team Checking (11 Tasks)	Preparing for the consultant check (11 Tasks)	Consultant Check (7 Tasks)	Review by the community (6 Tasks)	Finalizing for Publication (24 Tasks)	In Progress
<a href="#">MAT</a>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<a href="#">MRK</a>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<a href="#">LUK</a>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<a href="#">JHN</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> (1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(1) <a href="#">Stage 2: Team Checking</a> 8631 issues in 3 checks

- Check the box for the stages of each book as appropriate.  
*The stage will be marked as complete unless errors have been found. The errors must be corrected before the stage can be marked as completed.*

Paratext 8 will likely find errors for most older projects since new checks have been added.

## 8

# Setting up a project for success

Things to consider:

It is a dynamic process

- When a project is brand new there aren't a log of settings that can be fixed in concrete.
- As the project matures some of the inventories begin to make sense.

*Who is working on the project?*

- Setup the Users, Roles and Permissions
- Would it be helpful to have a "Simplified Menu"?

*Do you need to customize the settings?*

- custom.sty
- change settings of the stylesheet
- names of markers (in other languages)
- colour to help identify features?
- custom.vrs
- identify verses that are different from default versification

What orthography will be used?

- Put the orthography in the language settings.
- (Keep in mind that what you put in the language settings could be going to the "Speech and Language Data Repository")

How will the characters be keyed?

- Keyman/MSKLC
- AutoCorrect.txt

What Quotation system will be used?

- Set up the quotation rules (Dynamic)
- Think about your rules
- Test what you have
- Adjust the rules
- Make corrections to the rules / or text as necessary

When you have some text data:

- Begin setting up the inventories
- Let's start at the very beginning (Characters)
- Look for options in the inventories!
- Is the item valid all the time? Or just in certain situations?

Scripture Reference Settings

- What book names are you using?
- What is the format for a reference?
- Where will you put the origin of notes?

# 9

## CV: Convert project

---

### 9.1 Introduction

If you have ever needed to rename your project, reduce the size of your project, change user names, change the encoding or struggled with composed/decomposed diacritics, then the convert project tool will help you solve these problems.

*Where We are*

You must be the administrator of the project to do these conversions.

*Why is this Important*

Although, it is possible to make some changes to existing projects through the project and setting dialogs, several major changes require that a new project is created. Using the convert project dialog allows the new project to keep the project history.

*What are you going to do?*

We will work through the six changes that can be made to your project.

- Changing the short name of the project
- Removing deleted files from the project history
- Clean up Paratext Live history
- Convert encoding to 65001 – Unicode (UTF8)
- Normalising – composed or decomposed
- Replacing old User names



---

## 9.2 To convert a project

- From the **Tools** menu, choose **Advanced**, then **Convert Project**

Convert Project

Old Project short name: MP

New Project short name: [1]

☐ Remove deleted files from project history: [2]

☐ Clean up Paratext Live history: [3]

☐ Convert encoding to 65001 - Unicode (UTF8): [4]

Normalization: Unchanged [5]

Replace old User Name Jenni Beadle [6] With [7] Add [8]

This dialog allows converting your project into another project applying chosen transformations. This process can take a long time. You must enter the name of a registered Paratext user in the "With" box, spelling it exactly as it appears in the user's official registration.

[More help..](#)

Convert [9] Cancel

---

## 9.3 Changing the short name of the project

- Confirm that the old name of the project is correct. (If not, close the dialogue and click in the correct project window, and access the dialog again.)
- Enter the new short name for the project in [1].

---

## 9.4 Removing deleted files from the project history

[2] Select this if you have deleted files (such as large illustration files) that you no longer want to be part of project history and no longer want in the project repository.

---

## 9.5 Clean up Paratext Live history

[3] Select this if you have edited the project with Paratext Live and want to replace names in the project history.

---

## 9.6 Convert encoding to 65001 – Unicode (UTF8)

[4] Select this to convert a standard project encoding to Unicode.



NOTE: This will not work to change the encoding if your project has a "hacked font".

---

## 9.7 Normalising – composed or decomposed

[5] Select Composed (NFC) or one of the options in the drop-down list if the data in your project was created using a mix of composed and decomposed characters. (See the Guide for more details).

---

## 9.8 Replacing old User names

- [6] Select the name of the user you want to replace from the drop-down list.
- [7] Enter the name of a registered Paratext user in this box.
- [8] Add, a summary of the replacement appears, with a "Remove" button.

Replace old User Name Jenni Beadle [6] With Matthew Lee [7] Add [8]

Replacing **Jenni Beadle** with **Matthew Zook** Remove

- (Click Remove if you either made a mistake in typing the name in the "With" field OR decide not to make the replacement.) (Click Remove if you either made a mistake in typing the name in the "With" field OR decide not to make the replacement.)

---

## 9.9 Convert the project

- [9] Click **OK** to convert the project.  
*See the note in the guide regarding shared projects.*

# 10

## CR: Cross-references

---

### 10.1 Introduction

Most languages do not have access to concordances and other Bible study materials in their own languages. Adding cross references to your New Testament can greatly help your reader understand the text by helping your reader find passages on similar themes.

#### *Where We are*

Before you can insert cross references from a model text your administrator must have created all the books (and chapters and verses) in your project. They can be empty but they must be present.

#### *Why is this Important*

Reading the New Testament is not like reading a novel. Having access to cross references allows your reader to find similar passages on the themes. But adding cross references one by one is too tedious. The insert cross reference feature allows you to insert all the cross references at once and also converts the book names and punctuation to match your scripture reference settings. Extracting cross-references from a model text allows you to easily insert the same cross-references.

#### *What are you going to do?*

We are going to do three things: export the cross reference from a model text; then make sure all the settings for book names and scripture references have been entered for your project; and finally insert the cross references.

If you don't have a model text with the desired cross-reference, you can create your own list and import it.

---

### 10.2 Extract the references from the model text

- Open the model text.
- From the **Insert** menu, choose **Cross references** then **Extract cross references**
- Type a filename
- Cliquez sur **OK**.

*Note: Resource texts may not allow you to extract cross references.*

---

## 10.3 Check your scripture reference settings

- From the **Project** menu, select **Scripture Reference Settings**.
- Verify that the following have been correctly defined for your project (edit them if necessary):
  - The punctuation on the Reference Format tab.
  - The book abbreviations on the Book Names tab.
- Click **OK**.

---

## 10.4 Check your Language Settings

- From the **Project** menu, select **Language Settings ...**
- Click the **Other Characters** tab.
- In the **Verse segment characters** box, enter at least six different characters separated by spaces.
- Click **OK**.

---

## 10.5 Insert Cross references

- From the **Tools** menu, point to **Cross References**, and then select **Insert Cross References**.
- Click **Browse....**
- Find the .xrf file of extracted cross references.
- Select the file, and click **Open**.
- If desired, select one or more of the options:

(see the guide for more info)

- Click **OK**

*If the Copyright box displays a copyright notice or required statement of acknowledgments, copy the text, and then paste it wherever you keep this kind of information for the project.*

---

## 10.6 Make your own xrf file

- Create a new text file
- Copy the first few lines from an existing cross reference xrf file.

```
Copyright = ...  
Model=GNT92  
Versification=English  
VerseSegmentCount=6
```

- Add a list of references where the first is the verse to put in the cross reference and then second is the cross reference.

```
MAT.1:23 {ISA.7:14}  
MAT.26:64 {DAN.7:13; PSA.110:1}
```

- Save the file in the cross reference folder.

Insert the cross references – ParaText will fail if there are any errors.

# Glossary

**Note** Thing

# **Index**