

Paratext 9.2

**Supporters
and Administrators (English)**

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Part I

Supporters
and Administrators Manual

1

IS: Install

Introduction

In this module, you will install Paratext 9. Paratext is the world's leading software application for the development and checking of new Bible translation texts, or revisions to existing texts. Developed jointly by UBS and SIL International, it enables consistent and accurate translation, based on original texts, and modelled on versions in major languages. Due in part to its cutting edge collaboration features, Paratext greatly assists in producing higher quality translations in much less time than previous tools and methods have allowed.

Where We are

You may have already installed an earlier version and now want to install Paratext 9.

Why is this Important

Paratext 7, Paratext 8 and Paratext 9 can all be installed at the same time but you need to understand the limitation of using them together.

- Several versions may be installed
- Some use different data directories.
 - My Paratext Projects (Paratext 7)
 - My Paratext 8 Projects (Paratext 9 and 8)
- Paratext 7 used a different server (which is now shutdown). Paratext 8 and 9 use the same data servers

What are you going to do?

You will install Paratext 9 (without uninstalling Paratext 7 or 8). You will also install an update from an MSP file.

1.1 Introduction

1.2 Install Paratext 9

Note: you do not need to uninstall and earlier version of Paratext. But you may need to uninstall an earlier BETA version of Paratext 9.

- Double-click on the installer file.
(available at <https://paratext.org/download> https://paratext.org/files/releases/9.1/Paratext_9.1.104.1_InstallerOffline.exe)
- Click, “I agree to the license terms”,
- Click **Install**.
This step might take a few minutes if the installer needs to install the .NET 4.8 Framework on your computer.
- If a dialog appears and asks for your permission, click **Yes** or provide the credentials as required.
A welcome message is displayed.
- Click **Next**
The destination folder step appears.
- Accept the defaults for the folder.

Note: Paratext 9 and 8 data may not share the same directory as Paratext 7 data.

- Click **Next**, then **Install**
- Click **Finish** and then **Close**.
- The first time you launch Paratext 9 you will need to enter your Paratext 9 registration code. Information on how to obtain this code is on the Registration page.

1.3 Register a user (first time run Paratext)

All users need a new registration for Paratext 9.

- Run Paratext (for the first time)
- Choose the interface language.
A dialogue box is displayed asking for your registration code.
- In your browser, go to <https://registry.paratext.org>
The Sign-in page is displayed.
- Log-in with a gmail work account
- Click on the Register link
- Type in the user name
- Type in (or copy) the user's Paratext 7 registration code
- Copy the new code
- Return to Paratext
- Paratext will paste the code
- Click **OK**

1.4 Manually updating your existing version of Paratext

The 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.

2

MD: Migrate Data

2.1 Introduction

Migration was the process of moving a project (including all settings files) from Paratext 7 to Paratext 8. Paratext 9 does not have a migration feature, but it can still be done using Paratext 8. Note: Paratext 9 can read Paratext 8 projects.

Where We are

You have already installed **Paratext 8** and you have a Paratext 7 project that you want to use in Paratext 9.

Why is this Important ?

In order to get the full functionality of Paratext 9 your Paratext 7 project needs to be migrated. Paratext 7 and Paratext 9 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 9. It is also hoped that the old (Paratext 7) server will be closed down at the end of December 2018. So it is important to migrate as soon as possible.

Users can have both Paratext 7 and Paratext 9 and 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 9.

Once you have migrated the project, everyone on the team needs to get the migrated project, and only do work in Paratext 9 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 9 once the project is migrated.

What are you going to do?

You will


- migrate a shared project
- migrate a non-shared project

2.2 Migrate Shared project

If you administer a project that is shared in Paratext 7 and you want to migrate it to Paratext 9, this is how you need to proceed.

2.2.1 Prepare a project for migration

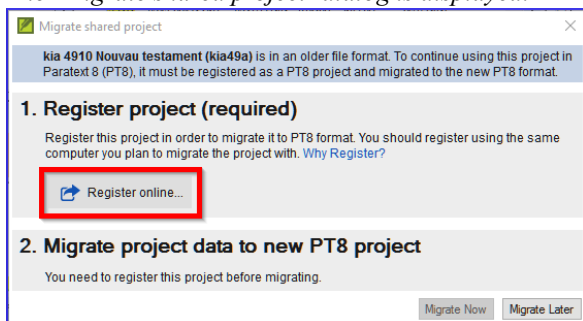
All your users have to upgrade at the same time.

- 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 9**.
- **File > Open Project/Resource**
- Click the box at the bottom left to 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 9. If yours is one of them, Paratext 9 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 9 may tell you the project must be registered (if it is not preregistered) and it must be migrated to Paratext 9.

2.2.2 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 9 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 9 registered users can view the name of standard projects, a confidential project will be hidden even from other Paratext 9 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 Registration**.
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.

- Go back to Paratext.
It should detect that the project is now registered, and inform you of that.

✓ Migrate shared project

My Paratext Project 2015 (MPP15) is in an older file format. To continue using this project in Paratext 8 (PT8), it must be registered as a PT8 project and migrated to the new PT8 format.

1. Register project (required)

Register this project in order to migrate it to PT8 format. You should register using the same computer you plan to migrate the project with. [Why Register?](#)

✓ Project successfully registered. [Manage registration...](#)

2. Migrate project data to new PT8 project

Do not migrate until ALL of the following statements are true. [Why migrate?](#)

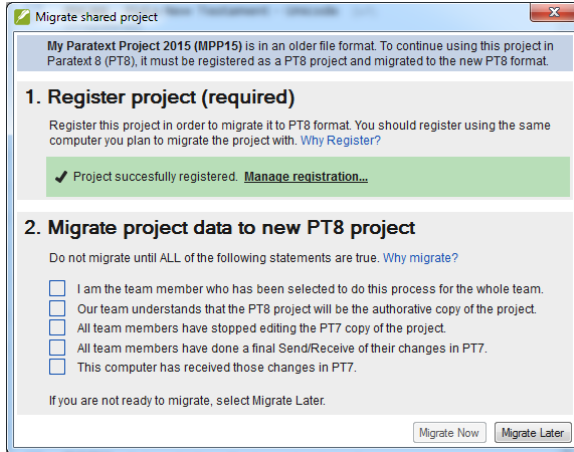
- ☐ I am the team member who has been selected to do this process for the whole team.
- ☐ Our team understands that the PT8 project will be the authoritative copy of the project.
- ☐ All team members have stopped editing the PT7 copy of the project.
- ☐ All team members have done a final Send/Receive of their changes in PT7.
- ☐ This computer has received those changes in PT7.

If you are not ready to migrate, select Migrate Later.

[Migrate Now](#) [Migrate Later](#)

2.2.3 Migrating a registered project

- 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.

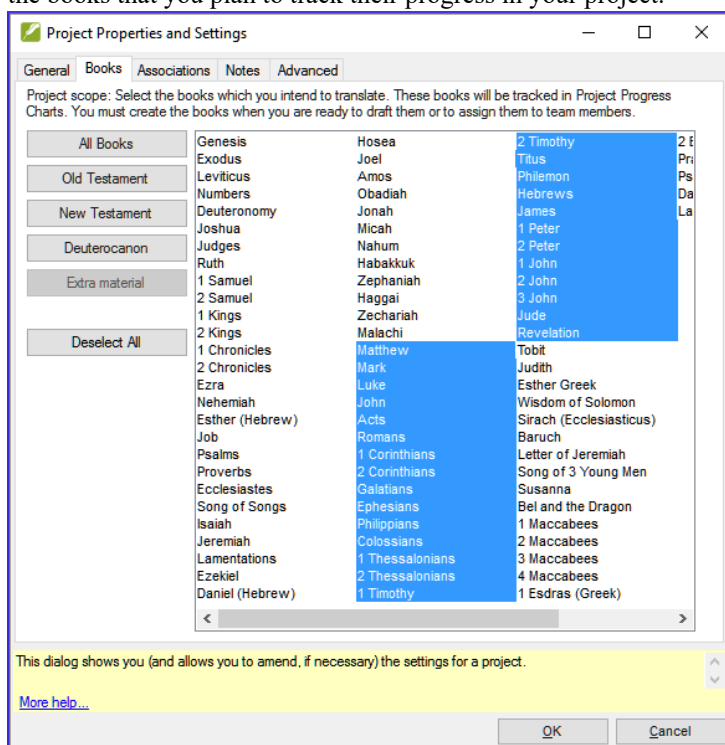
- When you click **Migrate now**, Paratext will copy the project from your Paratext 7 into your Paratext 9, and will also do a send/receive to the Internet.
- If you get a warning about doing a final send/receive in **Paratext 7**, click **OK** which stops the migration process, mark a point in the Project History in **Paratext 7**, then **restart the migration** in Paratext 8.
- Now your colleagues can go to **Paratext 9** and do a **Send/Receive** to receive the migrated project.

2.3 Additional Project settings

- **Language identifier:** After you click “Migrate now”, Paratext 9 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 either in brackets after the language name, or listed separately below the 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.



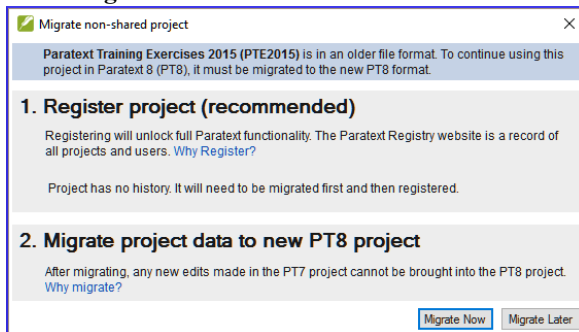
You can choose book by book, or specify **Old Testament**, **New Testament**, **Deuterocanon** by using the buttons. You can change this list of books later on in the project if your plans for the project change.

Note: Once you have migrated your project, you need to migrate the back translation and any other daughter projects (one after the other).

2.4 Migrate a non-shared project

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

- Run Paratext 8
- **File > Open Project/Resource**
- Click "**Show Paratext 7 Projects**"
- Choose the desired project
- Click **Migrate Now**



When you click "Migrate" the project will be migrated to the Paratext 9 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 9. Or maybe they can uninstall Paratext 7 from their computer if they don't need it for other projects.

3

REG: Registration

3.1 Introduction

Starting with Paratext 9 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 9 has been installed on your computer and you have the Paratext 7 registration codes for your team members.

Why is this Important?

In Paratext 9 both users and projects should 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 P9 user
- You will register a new P9 project
- You will see what information is displayed in the ParaText Registry for a registered project.

3.2 Register for (with a Google account)

- Go to <https://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 3.4

3.3 Filling in the registration

- Click the appropriate circle to choose your **registration type** (new registration, previous Paratext 7 registration, or previous Paratext 9 registration).
- If you are a Paratext 7 user, fill-in your Paratext 7 code
- 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 émail 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)

3.4 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.
- 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 3.3).

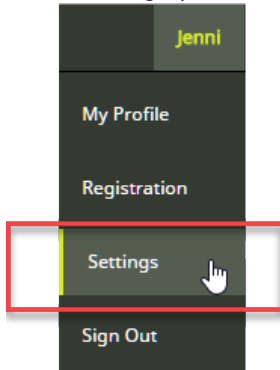
3.5 Change (generate) a new Paratext code

There are many reasons why you may need to change your Paratext code, one common reason is if your computer is stolen or crashes.

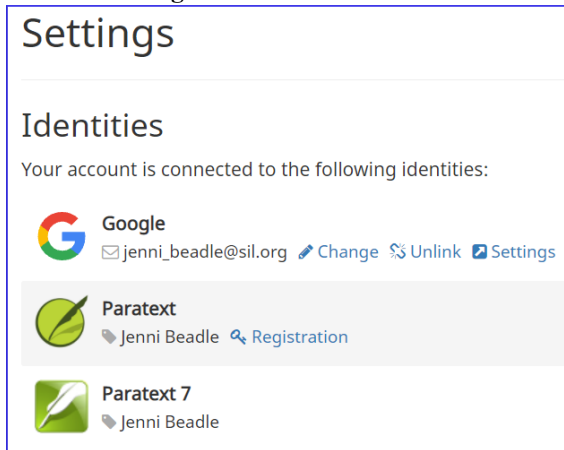
3.5.1 Change your own code

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

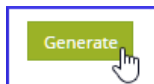
- Click on your user name at the top left.
A menu is displayed.



- Click on **Settings**.



- Below Paratext, click **Registration**.
The registration Details screen is displayed.
- 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.

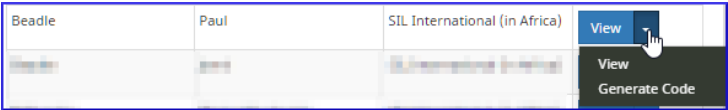
- Go to your email, and copy the new code.
- Go back to Paratext
It may already have pasted in your new code.
- If it has not, paste in the new code into the registration form, and click **OK**.
You should be reregistered.

You will need to do this on any other computer that your Paratext code is installed on as well.

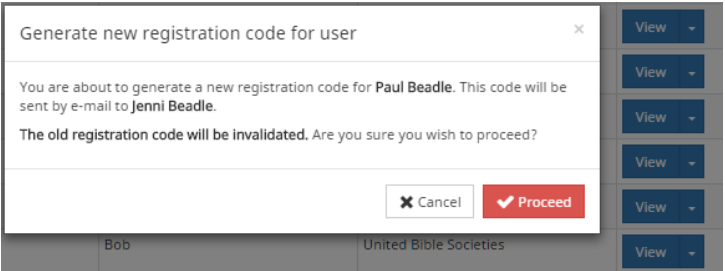
- If Paratext is not connecting to the Internet to detect that you need to give a new code, go to
- ≡ **Tab**, under > **Help** > **Registration Information** and paste the code there.

3.5.2 Change a user's code (who you registered)

- Go to the registration website, <https://registry.paratext.org>
- Log in (if you are not logged in)
- Click on User
- Click on the user's name in the list
- Click on the down arrow beside View
- Choose **Generate code**



A message is displayed.



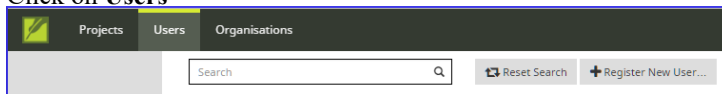
- Click **Proceed**

- Check your email for the code.

3.6 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 <https://registry.paratext.org>
- Log in if you are not already logged in.
- Click on **Users**



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

Register New User

Use this form to register for someone who has difficulty accessing the internet or who does not have an email 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.

First Name *

Last Name *

Email Address Enter the user's email address if available, or leave this field blank. Do not enter your own email address here.

Preferred Language Enter the user's preferred language for communication, if you know it. Otherwise, leave this blank.

- Fill in their name, and the rest of their information.

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. But you can generate a new code see 3.5

3.7 Translation project by an unrecognised individual/organisation

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

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

4

CP: Creating a new project

4.1 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 9 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.

4.2 Create a new project

- **File > New Project**

*The **New project** dialog is displayed.*

The screenshot shows the 'Project Properties and Settings' dialog box with the 'General' tab selected. The dialog has a title bar with a green icon and standard window controls. Below the title bar is a red banner with an information icon and the text 'Incomplete tab(s): General'. The 'General' tab is active, showing fields for 'Full Name' (My Paratext Project 3), 'Short Name' (MP3), and 'Copyright'. An 'Edit...' button is next to the 'Short Name' field, marked with a blue '1'. Below these is a 'Language' dropdown menu with a red error icon and a blue '2'. Below the language dropdown are 'Edit/View...' and 'New...' buttons, followed by a 'Language Settings...' link. The 'Versification' dropdown is set to 'English' and is marked with a blue '3'. The 'Type of Project' dropdown is set to 'Select project type' and is marked with a blue '4'. The 'Based on:' field is empty and marked with a blue '5'. The 'Registration' section shows a message: 'Project type must be selected before project can be registered.' At the bottom, there is a yellow box with the text 'This dialog shows you (and allows you to amend, if necessary) the settings for a project.' and a link 'Aide supplémentaire'. The 'OK' and 'Cancel' buttons are at the bottom right, with the 'OK' button marked with a blue '6'.

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.

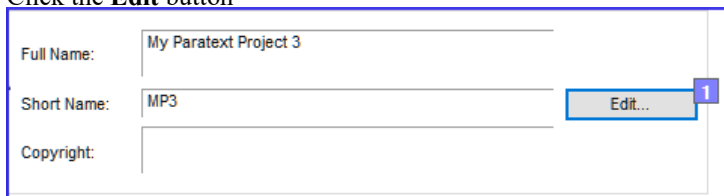
This dialog shows you (and allows you to amend, if necessary) the settings for a project.

[Aide supplémentaire](#)

OK 6 Cancel

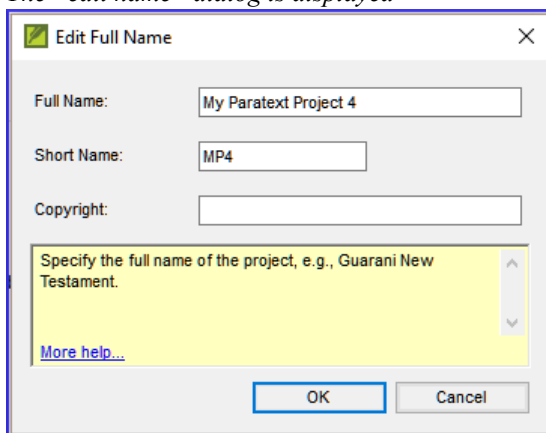
4.3 Name for the project

- Click the **Edit** button



A screenshot of a form for entering project details. It has three text input fields: 'Full Name' containing 'My Paratext Project 3', 'Short Name' containing 'MP3', and 'Copyright' which is empty. To the right of the 'Short Name' field is a button labeled 'Edit...'. A blue box with the number '1' is placed over the 'Edit...' button.

The “edit name” dialog is displayed



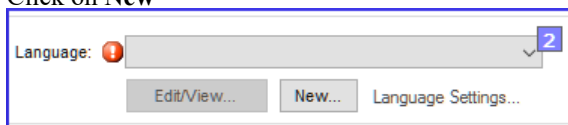
A screenshot of a dialog box titled 'Edit Full Name'. It contains three text input fields: 'Full Name' with 'My Paratext Project 4', 'Short Name' with 'MP4', and 'Copyright' which is empty. Below these fields is a yellow-shaded area with the text 'Specify the full name of the project, e.g., Guarani New Testament.' and a blue link 'More help...'. At the bottom are 'OK' and 'Cancel' buttons.

- In the name section, under Full name, type a name which includes the name of the language.
- Under short name enter the **ISO** code for the language.

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. (However, you can convert the project to a new project with a different short name. But it can take many hours to convert a project.)

4.4 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 .

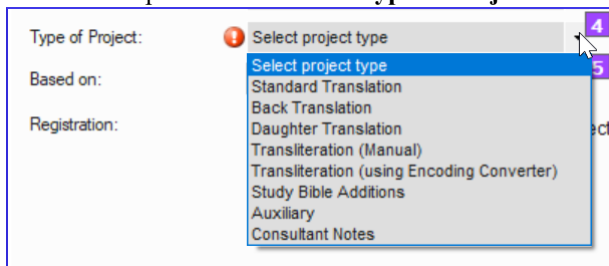
- Click in the **Search** box
- Start typing the name of your language
Paratext will display matching names.
- Click on your language in the list.
Paratext will add the language name.
- Fill in the advanced fields if necessary.

- Click **OK**.

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

4.5 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.

4.6 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 and return to Paratext.
Paratext should "automagically" detect that the project is now registered,
- Click **OK** to create the new project.

The types of projects that do not need to be registered separately:

- Projects that inherit their inscription from the parent project.
- Back translations
- Transliterations
- Auxiliary
- Consultant notes.

4.7 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,
- ≡ **Tab**, under > **Project** > **Project Settings** > **Properties**
- 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.

5

IR: Installing Resources

5.1 Introduction

In this module you will learn how to install resources.

Where we are

You have already installed Paratext 9 and registered a user.

Why is this important?

In Paratext 9, 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.

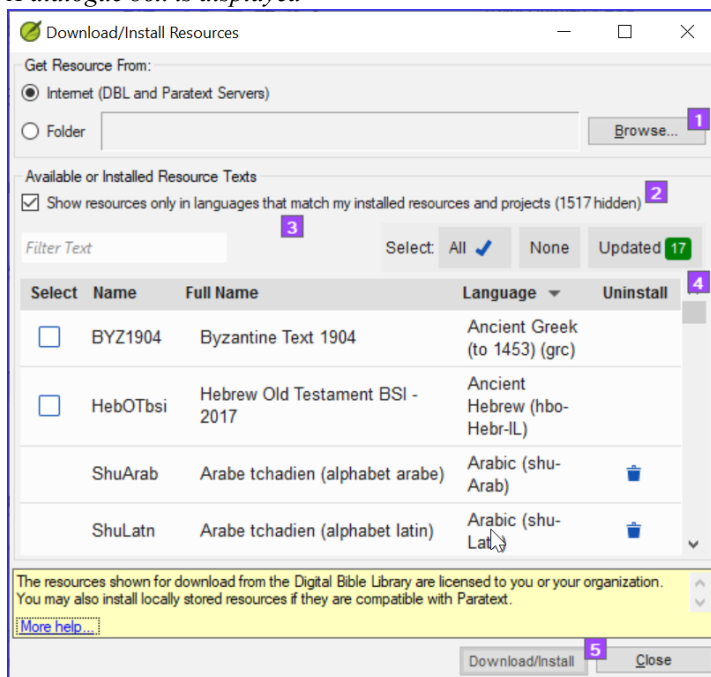
What will you do?

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

5.2 Install resources – Internet (DBL)

- Click the ≡ **Paratext** menu, then under Paratext, choose **Download/Install resources**

A dialogue box is displayed



- Make sure Internet has been chosen.
- Filter the list by typing in the **filter box** (type name or language or + for enhanced)
- Click the check boxes to the left of the desired resources.
- Click **Download/Install**

5.3 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**

6

PP1: Setup Project Plan

6.1 Introduction

“Progress tracking” based on a Project Plan and Assignments and Progress is an improved feature in **Paratext** 9.1 that impacts 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

There are many tasks to be done in a translation project. It is important to have a system to ensure that all of these are done. It is also good to have an easy way to generate reports for supervisors and funders (see PP2: Project Plan Report).

Setting up a project plan from scratch is daunting. Various Bible translation organizations (ABU, SIL and The Seed Company) will include "basic" plans that can be applied to projects. Teams need only customize these plans within the limits set by their organizations.

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?

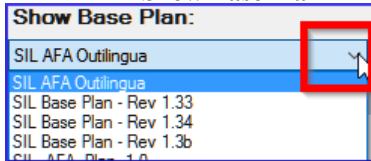
You will use a combination of two features: the settings of the **Project Plan** and the **Assignments and Progress** (sometimes referred to as “progress tracking”) to manage the plan by assigning team members to tasks, and tracking their progress in completing those tasks.

- 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.

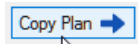
6.2 Add the organisational base plan

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

- ≡ **Tab** menu, under Project > **Project Settings** > **Project plan**
- 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.

6.2.1 Remove current plan (before adding another)

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

- ≡ **Tab** menu, under **Project**> **Project plan settings**
- Click **Manage plans**
- Click on the last stage
- Click the **Remover Stage** button



- Click Yes (twice) once to confirm you want to modify the plan, and again to confirm you want to delete the tasks in the stage.

- Repeat for remaining stages
- Add the new plan (see above)

6.3 Configure the tasks and checks

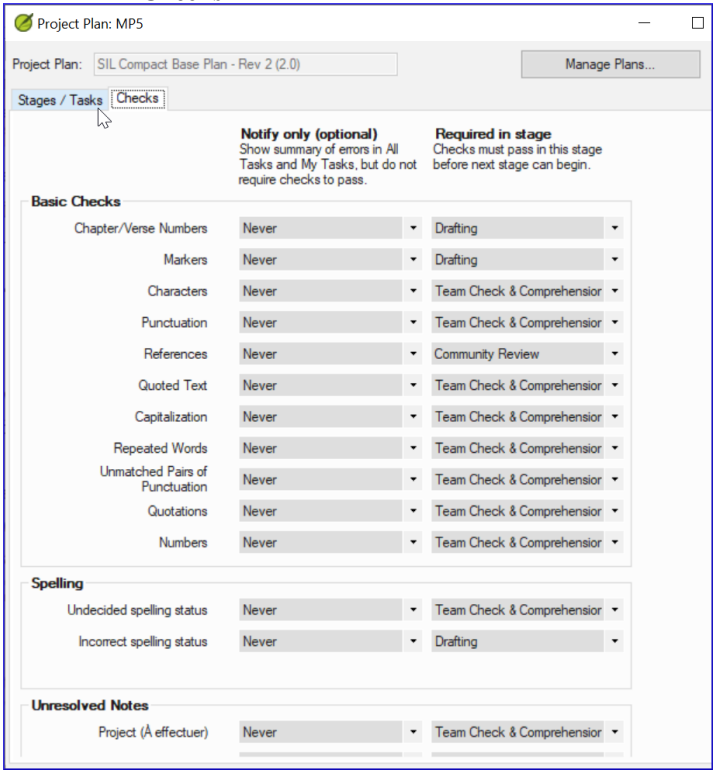
6.3.1 Configure — Books to include

- [≡ **Tab** under **Project** menu > **Project settings** > **Project properties**
- Click the **Books** tab
- Choose the books that you want to track progress.
- Click **OK**

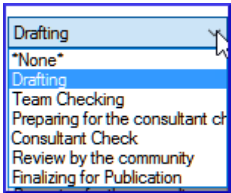
6.3.2 Configure — assigning checks to a stage

- ≡ **Tab** menu, under **Project**, choose **Project properties** then **Project Plan**

- Click on the **Checks** tab



- Click on the Checks tab
- Two columns are displayed: Required stage and Optional stage.
- Set the Required in stage
- Set the Notify only (optional) to an earlier stage if any.
- Click OK
- For the desired check, drop down the list and set the **required stage** [12]



- Choose the new stage or *none*
- Then set the Notify only (optional) to an earlier stage if any.

6.3.3 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.

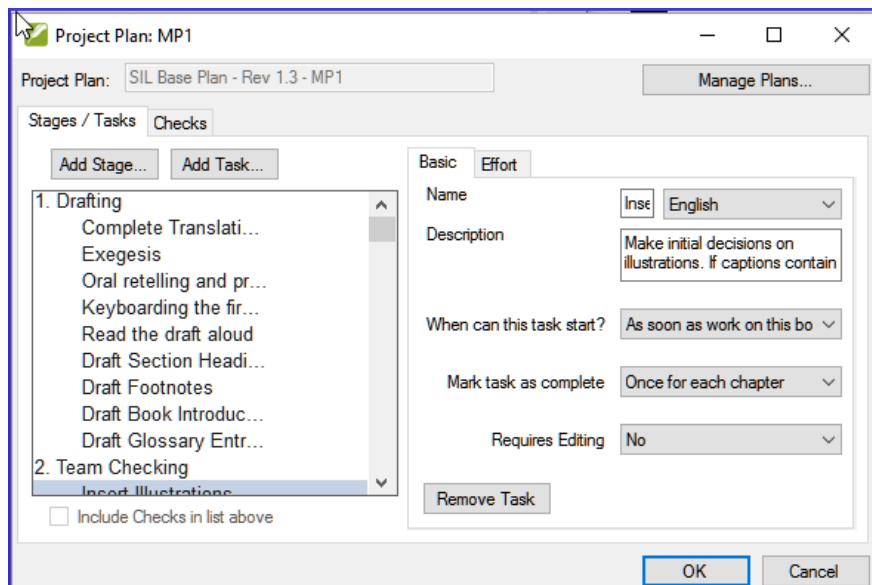
- From the **Tab** menu, under **Project** menu, choose **Project Properties**, then **Project Plan**
- Click the **Stages/Tasks** tab.
- Select the task you want to move.
- Click the up arrow or the down arrow to move the task to a different point with respect to the other tasks, or to move it to a different stage.
You may get a messages asking to confirm.
- Click **OK**.

6.3.4 Configure — Add tasks

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

6.3.5 Configure — Delete tasks

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



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

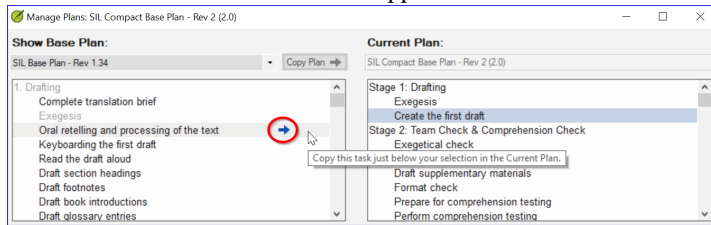
6.3.6 Rename or edit tasks

- 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.

6.3.7 Copy a task from one plan to your project

Note: Follow the steps below to copy a task from the **base project plan** of one project **to the project plan** for your project.

1. Open your project [\equiv **Paratext** under **Paratext** select **Open**].
2. \equiv **Tab** menu, under **Project** select **Project Settings > Project plan**
3. Click **Manage plans**
4. From the "**Show Base Plan**" drop-down, select the project plan that contains the desired task.
5. On the **Current Plan** side of the dialog, click the row that has the task which should precede the new task.
If you want the new task to be the first task in the stage, select the stage name instead.
6. On the **Base Plan** side of the dialog, hover over the task you want to add and click the solid blue arrow that appears.



The task is copied to your project plan and cannot be copied again into this 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.

The short name of the project is added to the plan name.

6.4 Check the settings for a task

- There are three settings for each task
 - 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)

- ≡ **Tab** menu, under **Project** select **Project Settings > Project plan**

- Click the task

The settings are shown at the bottom right

Mark task as complete By chapter 8

When can this task start? After previous stage is complete for chapter 9

Requires Editing Scripture Text (MP5) 10

- Make any changes as needed.
- Repeat for any other task.
- Click **OK**.

6.5 Priority Groups

Priority groups are a way to let Paratext know the order in which books or chapters should be worked on.

6.5.1 Using preselected set

- Open the Project menu,
- Choose Project settings and go to Define priorities
- Click Select Priority Definition Select a set (e.g. SIL Easy to Difficult set)
a pre-selected set of books is presented.
- Click OK

6.5.2 Setting up priorities

- Open the **Project** menu, choose **Project settings** and go to **Define priorities**
- Select the desired books, then click Right arrow button
- Click the three dots, choose **Edit**
- Rearrange the books as needed by clicking on a book and moving it up or down using the arrows buttons.

- Rename the group (e.g. Gospels).
- To set specific chapters,
 - Select a book name link
 - Choose which chapters
 - Click OK
- If you add a book which already has chapters defined it will only add the remaining chapters.
- Change order of priorities using the up arrow.

6.5.3 Using the priorities

Once priorities have been created, they can be used anywhere you would normally choose books. For instance,

- **Find** dialog (Ctrl+F)
 - Click on **choose**
 - Select the **Priority** tab.
- **Assignments and Progress** (blue button), book selection can be set to a priority.
- (Project menu) **Export PDF**, choose
- Any window with a filter

You can also define or redefine your priorities if you need to.

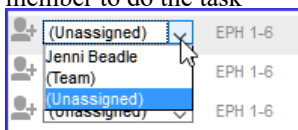
6.6 Assign tasks to team members

Tasks can either be assigned individually or in bulk.

6.6.1 Assign tasks individually

- ≡ **Tab** menu, under **Project** menu, choose **Assignments and Progress**

- For the task to assign, click to dropdown the menu and choose the team member to do the task



- Repeat as necessary
- Click **OK**.

6.6.2 Bulk assign tasks

- Click the **Blue** Assignments and Progress button
- Choose **Tasks Table**
- Use the verses filter to select books
- Below the task, click **Assign tasks**
Incomplete chapters can be reassigned but not completed chapters.
- *A warning message will appear with options to overwrite all assignments or only those chapters that have not yet been assigned.*

6.6.3 Assign Stage or book

- Click the **Assign stage** button (at the top of each stage).
- Change assignments for certain tasks as needed.

Once you have completed the bulk assignment process you can fine-tune the assignments in the **All Task**view

6.7 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 9 the Tasks table view and/or the Stage table view of Assignments and Progress can be helpful in marking multiple books, stages or tasks, as complete.

- Click on your project.
 - Click the **Blue** Assignments and Progress button
 - Choose **Stages Table**
-
- Click the ≡ **Tab** menu and choose **Bulk Progress Mode**.
Checks are temporarily turned off.

Assignments and Progress: MPS

Automated checks have been disabled so that you may record progress for multiple tasks in these views: Stages Table Tasks Table

Exit Bulk progress mode and re-enable checks

Stages Table All books

	Drafting (2 Tasks)	Team Check & Comprehension Check (7 Tasks)	Preparing for Consultant (2 Tasks)	Consultant Check (4 Tasks)	Community Review (3 Tasks)	Final Preparation for Publication (4 Tasks)	In Progress
MAT All Stages ✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
MRK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

- Click **All stages** button
All of the stages are approved.

When you finish doing all the approvals, go back and uncheck bulk progress mode.

7

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?

8

CV: Convert project

8.1 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

8.2 The convert project dialog

- From the project **Tab menu**, under **Project**, choose **Advanced**, then **Convert Project**

Convert Project

Old Project short name:

New Project short name:

☐ Remove deleted files from project history.

☐ Clean up Paratext Live history.

☐ Convert encoding to 65001 - Unicode (UTF8).

Normalization:

Replace old User Name: With:

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...](#)

8.2.1 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].

8.2.2 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.

8.2.3 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.

8.2.4 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".

8.2.5 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).

8.2.6 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.)

8.3 Convert the project

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

9

CR: Cross-references

9.1 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. Nevertheless, adding cross references one by one is too tedious. The **Insert cross reference** feature allows you to insert all of 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;
- make sure all the settings for book names and scripture references have been entered for your project;
- 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.

9.2 Extract the references from the model text

- Open the model text.
- ≡ **Tab** under **Tools** menu, choose **Cross references** then **Extract cross references**
- Type a file name
- Click **OK**.

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

9.3 Check your scripture reference settings

- ≡ **Tab** under **Project** menu, select **Project Properties > 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**.

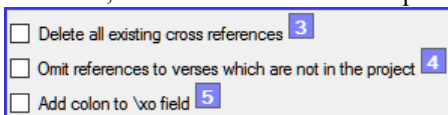
9.4 Check your Language Settings

- ≡ **Tab** under **Project** menu, select **Project Properties > Language Settings**
...
- Click the **Other Characters** tab.
- In the **Versé segment characters** box, enter at least six different characters separated by spaces.
- Click **OK**.

9.5 Insert Cross references

- ≡ **Tab** under **Project** menu, point to **Advanced**, 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:



☐ Delete all existing cross references **3**

☐ Omit references to verses which are not in the project **4**

☐ Add colon to \xo field **5**

(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.