Basecamp

Basecamp 3.0: User Guide

Version 1.0.0

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Contents

Introduction

Basecamp 3.0 is a web-based project management application for employees in a company to collaborate on tasks and projects. The software is available as a desktop application as well as mobile applications for Android and iOS. Basecamp aims to centralize information and files, providing methods for teams to collaborate in real time on the platform. The program also improves efficiency by supporting automated status check-ins, automatic report generation, and custom member notifications using email and other mediums.

Terminology

Campfire: A general discussion board within a Basecamp Team or Project. Members can post messages for everyone in the Team or Project to see and reply to.

Team: A group of employees within a specific department of a company, collaborating on various projects within their department's capabilities.

Project: A group of employees from various departments involved in a single project and its related tasks.

Folder: An organized storage space for files related to a specific topic. Works well for large-scale projects with multiple topics.

Ping: The Basecamp private messaging system. Members can message (or ping) each other individually and privately.

Key Concepts

Teams and Projects

Teams and Projects are spaces within Basecamp to coordinate with people. You can add members to Teams and Projects and collaborate with them, assign tasks, share files, check-in on their status, and send messages. While Projects and Teams are similar in functionality, you can only add external clients to Projects, not Teams.

Folders

Folders in Basecamp work in the same way they do on your computer. You can create a folder within a Team or Project and upload files to it. They help you to organize your file uploads and perform mass actions on files. You can rename, move, copy, archive, and delete folders.

Schedules

Every member of your Basecamp workspace has their own schedule. Any to-dos assigned to them are automatically added to the schedule. You can export your personal schedule to your Outlook calendar, Google Calendar, or iCal (Mac).

Check-ins

Check-ins allow you to stay updated on to-do status and ask about project status from individual members or the whole Team or Project. In Basecamp, you can set automatic or recurring check-ins so you don't have to ask the same questions manually.

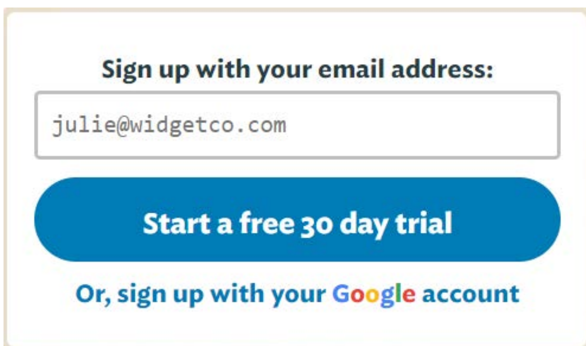
Basecamp

Getting Started

Sign Up for Basecamp

Before you begin, set up a Basecamp account. You will need to sign up for a trial first. At any point during this trial, you can pay for Basecamp to continue using it after the trial is over.

1. Visit https://basecamp.com.
2. Enter your company email address in the **Sign up with your email address** field. You can also click **Or, sign up with your Google account** to create an account using your Gmail address.



3. Click Start a free 30 day trial.
4. Once you're signed up, log in to Basecamp.
5. To buy Basecamp during the trial, log in and click **Buy Basecamp and upgrade today**.
6. Buy the plan most suited to your company.

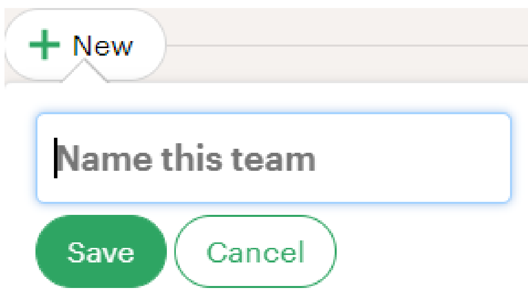
Note: All the tasks in this guide can only be completed if you're signed into your Basecamp account.

Create and add members to a Team or Project

Create a Team

Teams let you coordinate tasks among employees with related roles in your business. Within a Team, members can use Campfires and Message Boards to communicate. Teams also have Automatic Check-ins, but these don't allow the same depth of discussion that Campfires and Message Boards do.

1. On the Teams section of the Basecamp home page, click **New**.
2. Enter a name for your Team.

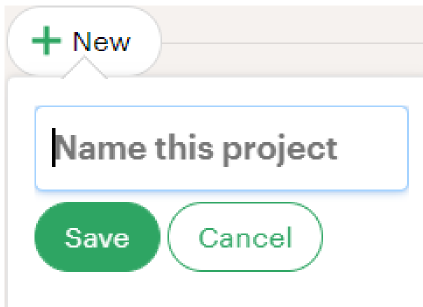


3. Click **Save**. Your new Team appears in the Teams section.

Create a Project

Create a Project on Basecamp. Projects are different to Teams in that you can include members from various departments and fields of expertise to collaborate on a single project.

1. In the Basecamp home page, under the Projects section, click **New.**
2. Enter a name for your Project.



3. Click **Save**. Your new Project appears in the Projects section.

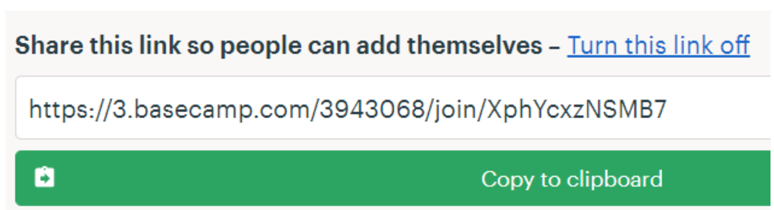
Add Members to a Team or Project

Add members to a Basecamp Team or Project using a shareable link or email.

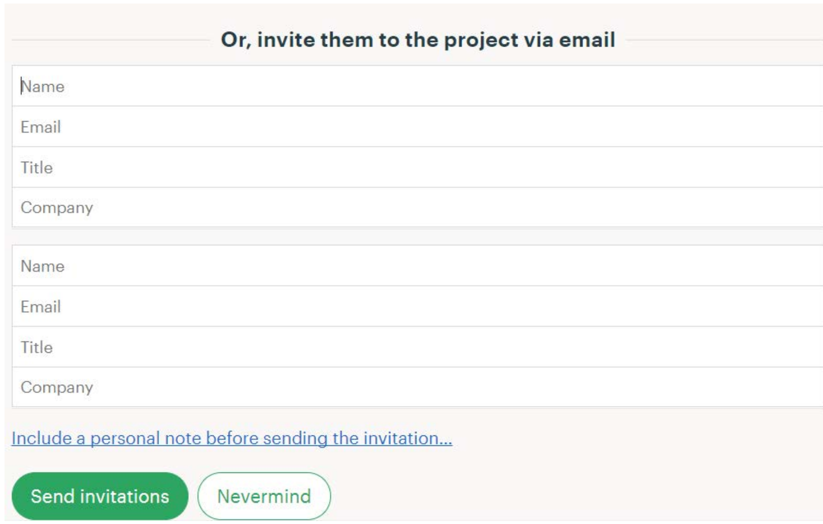
Add Members to a Team

1. On the Basecamp homepage, select the Team to which you want to add members. The Team page opens.
2. Click **Invite people to the team…**. A new screen appears that allows you to add people to the Team using a link or email.

3. To add members using the link, click Copy to clipboard and send the link to Team members individually using email or any other medium.



4. To add a member using email through Basecamp, fill out their name, work email address, title, and company name in the fields below the link. You can add multiple members at the same time.

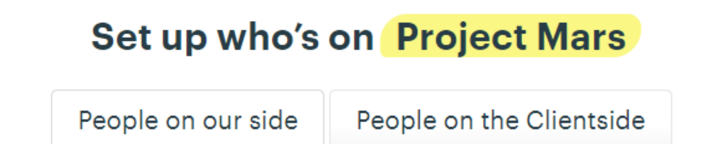


5. Click **Send invitations**. The new members appear in the Team page.

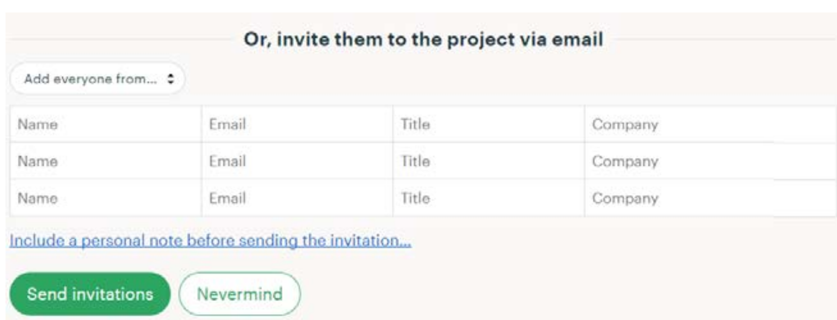
Add members to a Project

1. On the Basecamp homepage, select the Project to which you want to add members. The Project page opens.
2. Click **Invite people to the project…**. A new screen appears that allows you to add people to the Project.

3. Select the **People on our side** tab to add teammates to the Project. The invitations page appears.



4. To add members using the link, click **Copy** and send the link to Team members individually (such as through a private message).
5. To add members using email, fill out the fields in the **Or, invite them to the project via email** section.

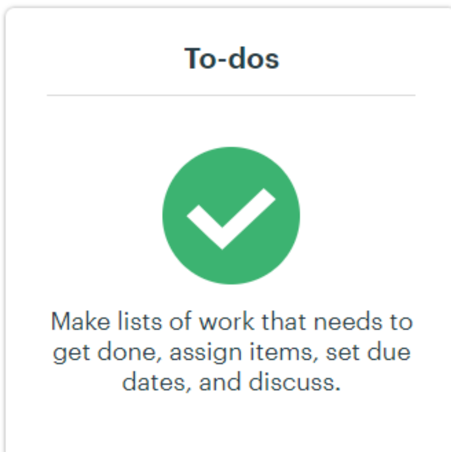


6. Click **Send invitations**. The new additions appear in the Project page.

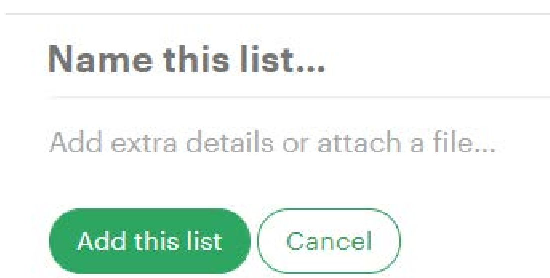
Assign to-dos to Team or Project members

You can assign to-dos to members of Teams or Projects in Basecamp. To-dos are contained in lists. You can set due dates for to-dos, assign them to specific members, and set up custom notifications for updates to to-do status. While this task shows the process for a Team only, it is exactly the same for a Project.

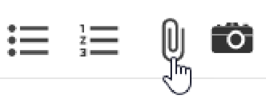
1. On the Basecamp home page, click the Team to which you want to assign to-dos.
2. On the Team page, click **To-dos**. The To-dos page opens.



3. Enter a name for the new to-do list and add details in the field below it.

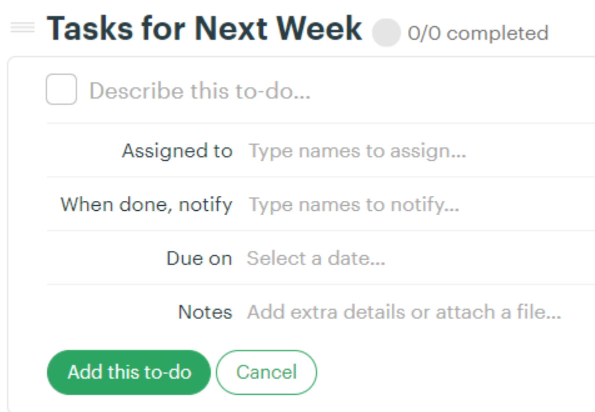


4. To attach a file to the list, click the paperclip icon in the top menu of the description field.



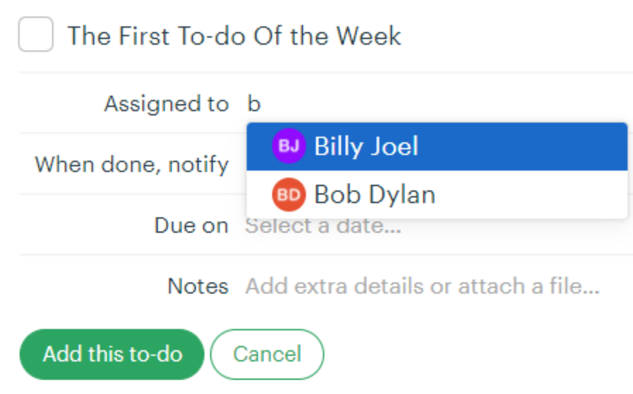
5. In the file selection window that appears, choose the files to attach and click **Open**. The new files appear in the list description.

6. Click **Add this list**. The to-do setup page appears.



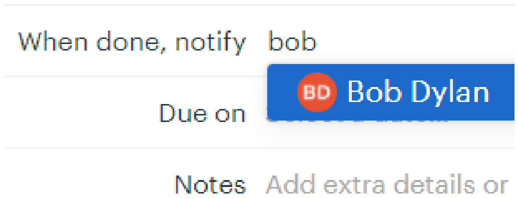
7. Enter a description for the to-do in the **Describe this to-do...** field.

8. Click on **Type names to assign...** and enter a member's name. Select a member from the list that appears.



9. To notify the team member of the to-do, select **Notify them about this assignment**.

10. To notify someone about a completed to-do, click the **When done, notify** field. Completed to-do notifications appear on the assigned member's home page, in the **Hey!** tab.

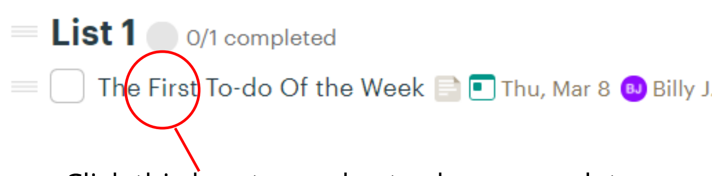


11. Enter the person's name and select them from the list. You can't notify people who aren't already on your Basecamp workspace.

12. To add a due date, click **Due on** and select a due date from the calendar. Members assigned the to-do are notified 7 days, 2 days, and 1 day before the due date. A late notification appears if the due date is passed.

13. Click the **Notes** field to add other information or files as needed.

14. Click **Add this to-do**. The new task appears in the list.

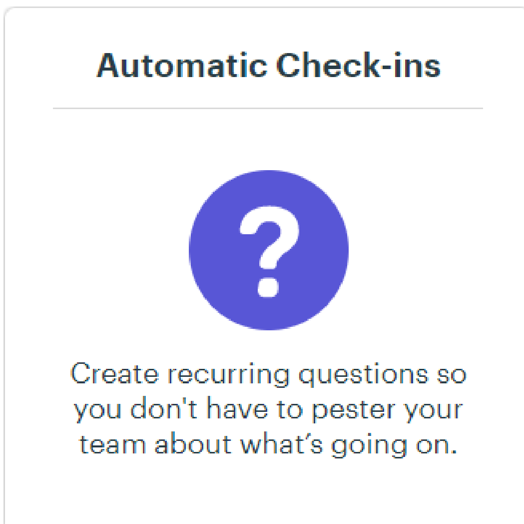


Click this box to mark a to-do as complete.

Create a recurring check-in for a Team

You can create automatic, recurring questions to ask specific people in Teams or Projects. These Check-ins let you stay up-to-date on the status of your projects and tasks. Check-ins appear as notifications on Basecamp, prompting replies from members. You can also notify specific people when check-ins are replied to.

1. On the Basecamp homepage, select the Team or Project for which you want to set up automatic check-ins.
2. On the Team or Project page, click **Automatic check-ins**



3. In the Automatic Check-ins page that opens, click on 

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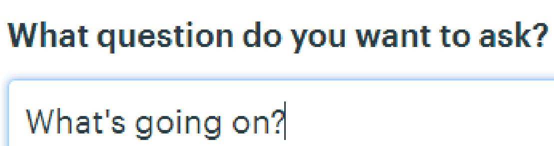
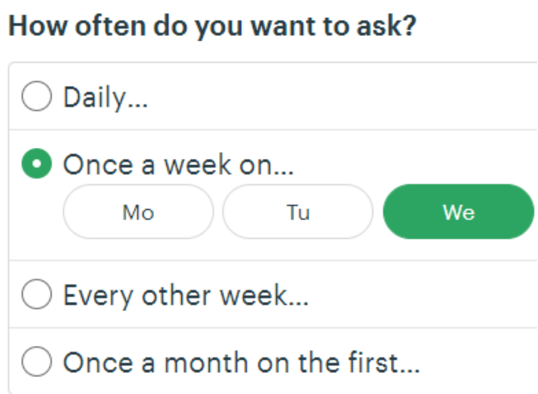
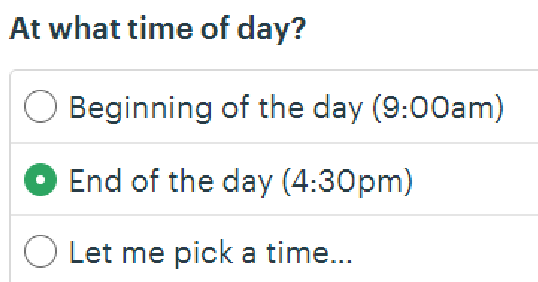
4. On the next page in the **Type your question...** field, enter the question you want to ask.



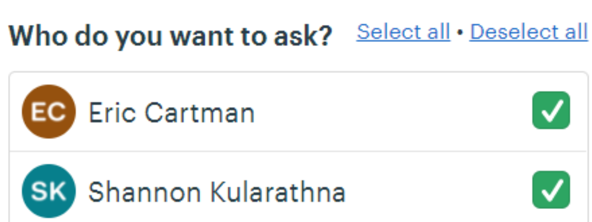
5. Set a schedule to ask the question. This can be daily, on specific days, weekly, every other week, or monthly.



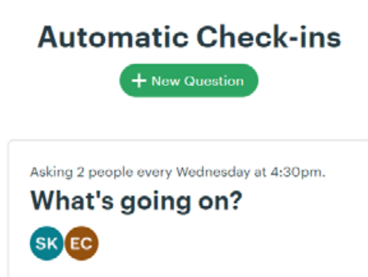
6. Select the time of day to ask the question.



7. Select team members to check-in with.



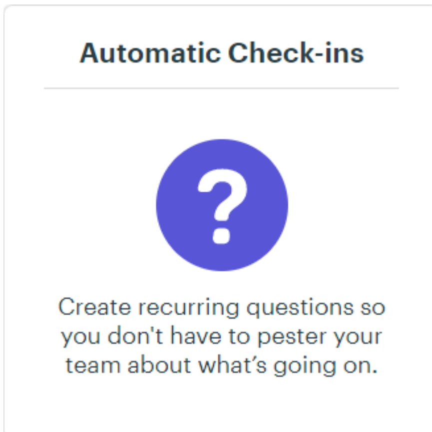
8. Click **Start collecting answers** at the bottom of the page when you're done. The new check-in will appear in the Automatic check-ins page.



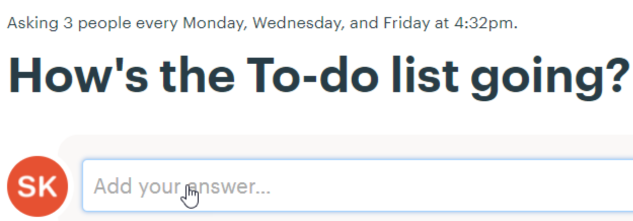
Reply to a check-in

Reply to a recurring check-in within a Team or Project. Replies appear as threads under the check-in.

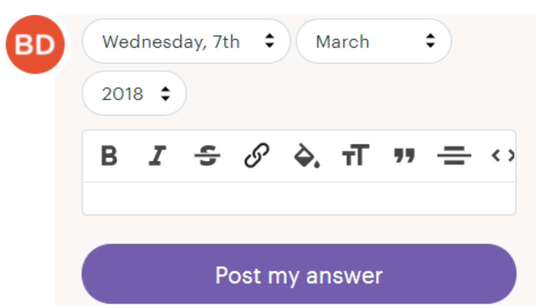
1. Open the Team or Project where the check-in is being asked.
2. Click **Automatic Check-ins**. The Automatic Check-ins page opens.



3. Select the Check-in question you want to answer. The Check-in page opens.
4. Click the **Add your answer...** field.

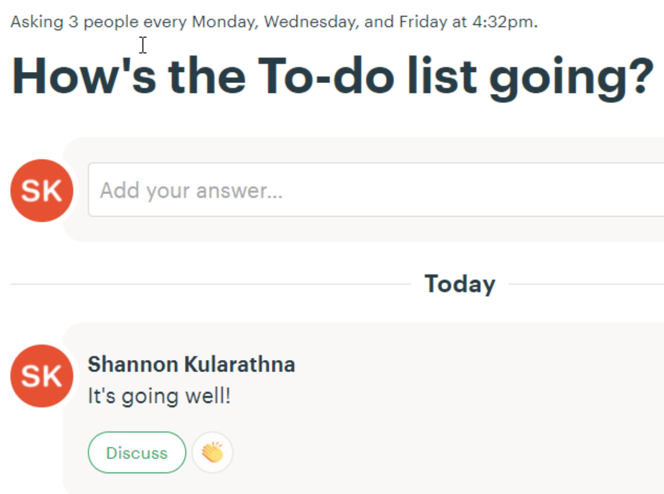


5. Change the date if needed. You can use this to schedule a reply to be posted in the future.



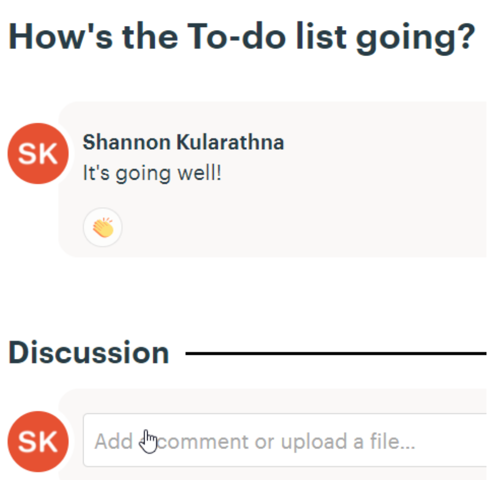
6. Enter your answer to the Check-in in the text field.

7. Click **Post my answer** when you're done. The answer appears in the Check-in page below the Add your answer... field.



8. To reply to another member's answer, click **Discuss** under their answer. The reply page appears.

9. In the Reply page for that answer, click the **Add a comment or upload a file...** field to respond.



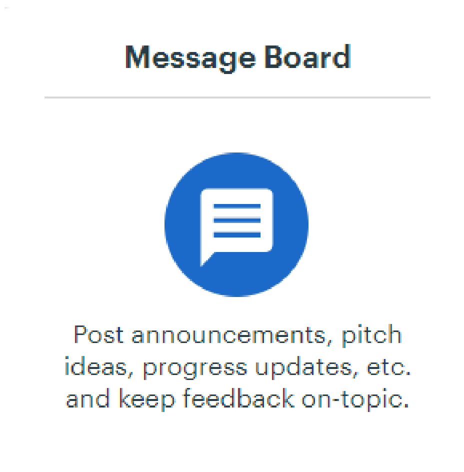
10. Enter your comment and click **Add this comment** to post it.

11. To applaud a comment, click the button under it. You can do this for any comment to show appreciation for it.

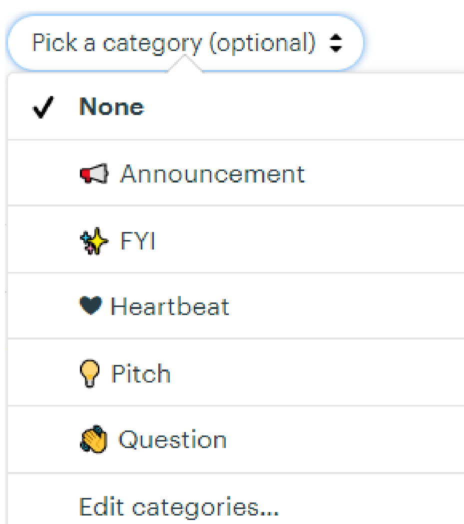
Send a Message to a Team or Project

Send a public message such as an announcement on a Message Board to a Team or Project and choose whom to notify. Message boards work the same way in Teams and Projects.

1. Click the Team or Project to which you want to send a message.
2. Click **Message Board**. The Message Board page appears.



3. Click the **Pick a category (optional)** drop-down menu to choose the type of message to send.



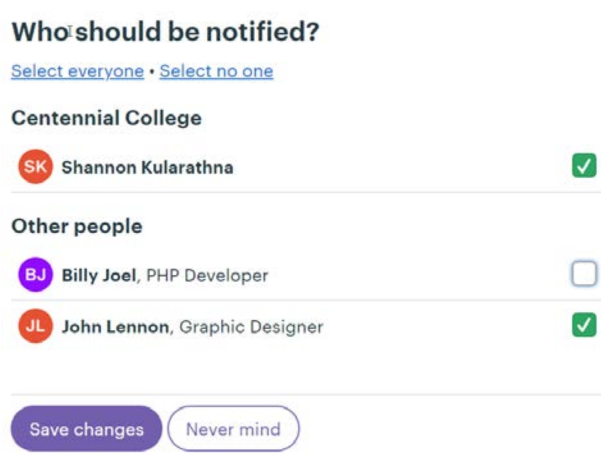
4. Enter a title for your message.

5. Enter the message body in the **Write away…** field.

6. Enter the message body in the **Write away…** field.
7. Click the paperclip button to attach files to the message.
8. Click the camera button to attach images to the message.
9. When you're done, click **Change…** under the message body to change who gets notified of the message. A popup window appears.

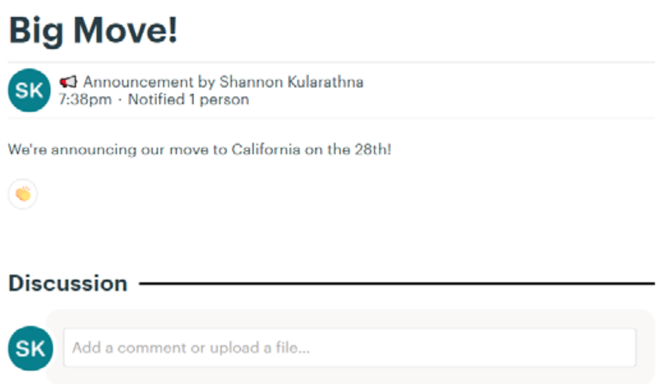
When I post this, everyone will get it. Change...

10. Select members to notify, then click **Save changes**. The popup window disappears.

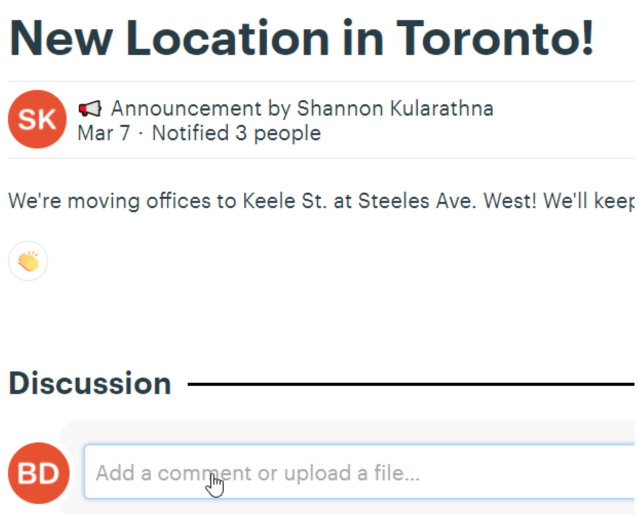


11. Click **Post this message** to send the message to the Team.

12. Your new message appears in the Message Board.



13. To reply to a message on the Message Board, click the message title. The message page opens.
14. Click the Add a comment or upload a file... field.

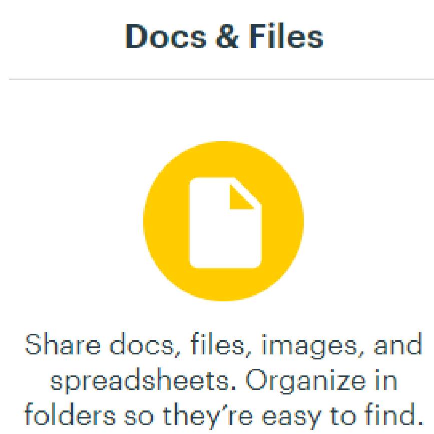


15. Enter your comment in the **Type your comment here...** field. Click the paperclip button to upload files.
16. Click **Add this comment**. Your comment appears as a reply to the message.

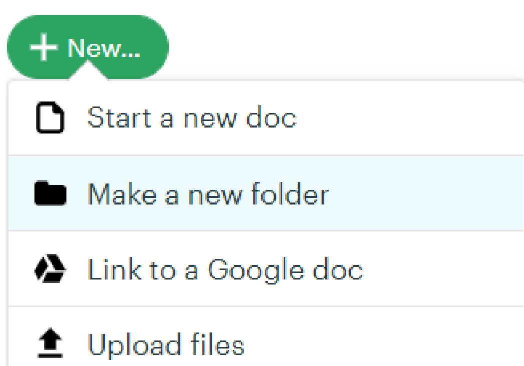
Create a Folder and add files

Create a project folder in a Team or Project on Basecamp and upload your files from a computer. Folders are spaces to organize and store files related to tasks, to-dos, or the Team or Project as a whole. Any member of a Team or Project can view these files. You can also notify specific members of a new file upload and add special notes to accompany the uploaded files.

1. On the Basecamp homepage, select the Team to which you want to add files.
2. On the main Team page, click **Docs & Files**. This opens the Docs & Files page.

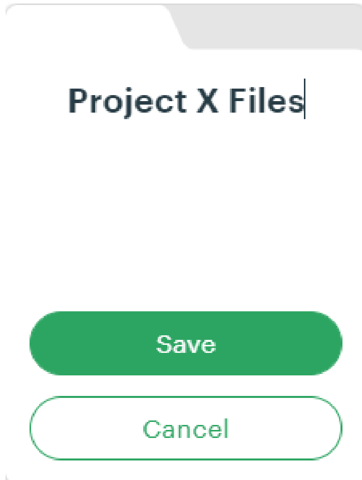


3. Click **New**.

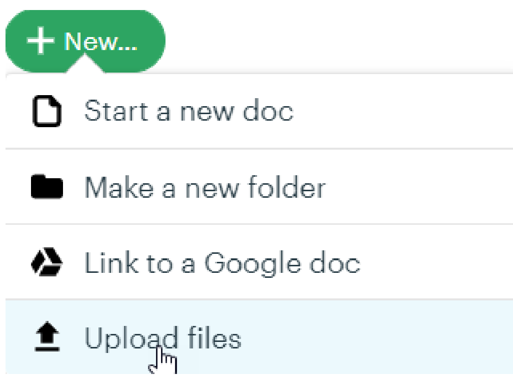


4. Select **Make a new folder** from the list.
5. Enter a name for the folder.

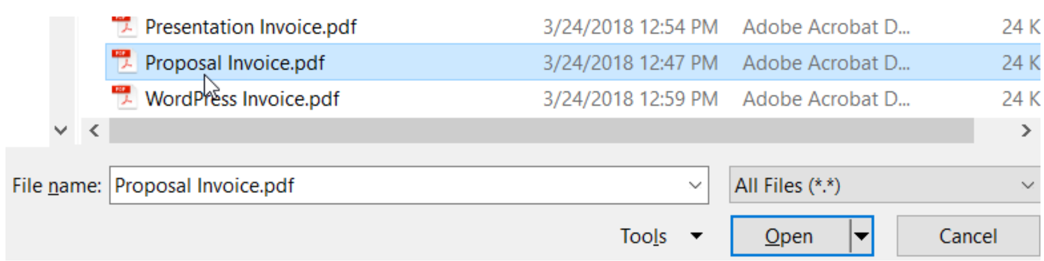
6. Click **Save**. The Folder appears in the Docs & Files page.



7. Open the folder.
8. Click **New**.

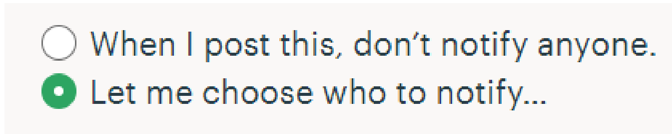


9. Select **Upload files** from the list.
10. In the window that appears, select the files you want to upload and click **Open**. This brings up the upload window.

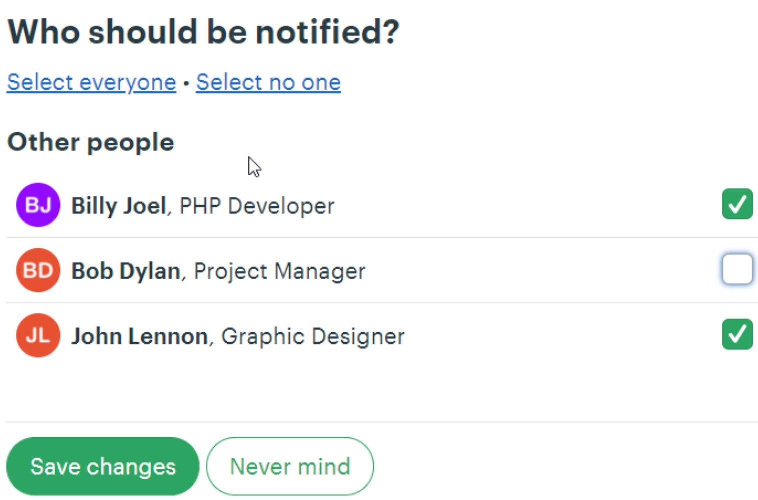


11. Name each of your uploads and add notes to accompany them.

12. On the same screen, select **Let me choose who to notify...** to send specific people a notification of the uploaded files.



13. On the "Who should be notified?" window that appears, select which team members to notify that files have been uploaded.



14. Click **Save changes**. The main upload page appears.

15. Click **Post these files**. Your files now appear in the folder. You can access the files through the Docs & Files page of the Team or Project.

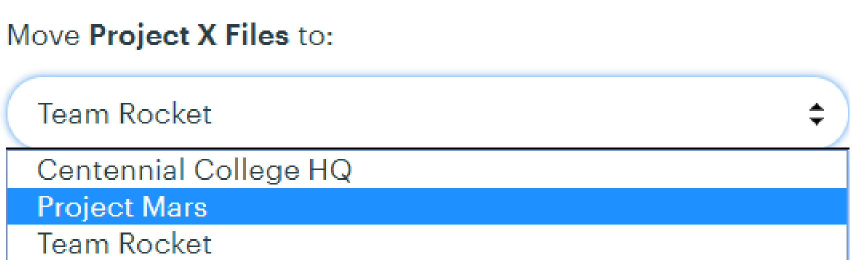
Move or copy Folders

Move or copy a folder to a new location. You can move folders if, for example, you're migrating to a new Team or Project on Basecamp and want to share the same files, or if you created a folder in the wrong place. You can also copy Folders and their files across Teams and Projects.

Move a folder

1. Open the Team or Project where the Folder you want to move is located.
2. Click **Docs & Files**. This opens the Docs & Files page.

3. Click the folder you want to make changes to.
4. Click the **Show options...** button on the top right corner.
5. Click **Move** in the drop-down menu. The Move page appears.
6. Select the new destination for the folder. Folders can be moved between Teams and Projects.

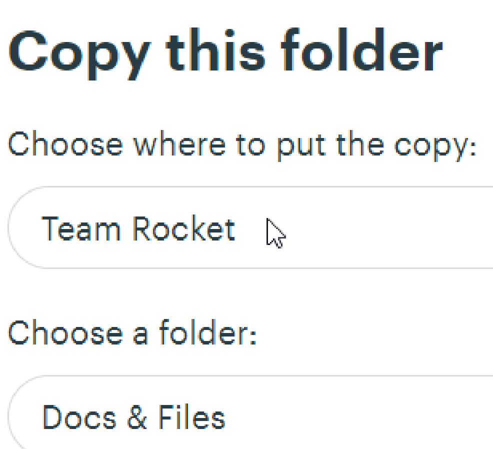


7. Click **Move to this new location**. The folder appears in the Docs & Files section of the destination Team or Project.

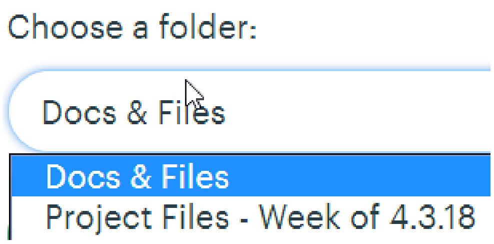
Copy a Folder

1. Open the Team or Project where the folder you want to copy is located.
2. Click **Docs & Files**. This opens the Docs & Files page.

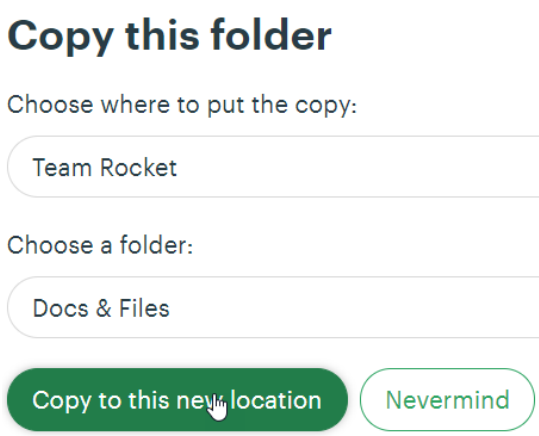
3. Click the folder you want to copy. The folder page opens.
4. Click the **Show options…** button on the top right corner of the window.
5. Click **Copy** in the dropdown menu. The Copy page appears.
6. Select the destination Team or Project to copy the folder. Folders can be copied between Teams and Projects.



7. Select the destination folder. You can copy the folder into another folder or into the main Docs & Files page for the destination Team or Project.



8. Click **Copy to this new location**. The folder will be available in both locations with all its contents.

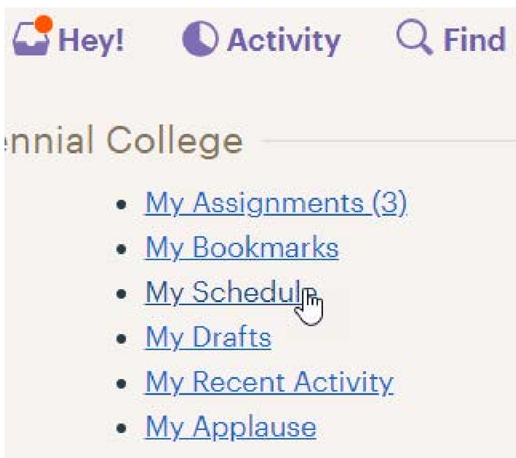


Export your schedule to an external calendar

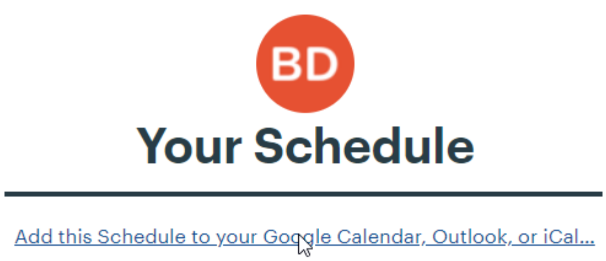
Deadlines on Basecamp are saved in a calendar, called a Schedule. You can manage, view, and edit these dates within the application, or you can export the schedule to your Microsoft Outlook account or Google Calendar.

Export to Outlook

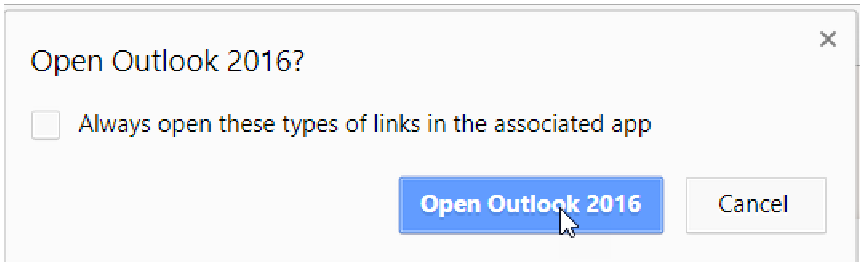
1. On the Basecamp home page, click **My Schedule** under the company name.



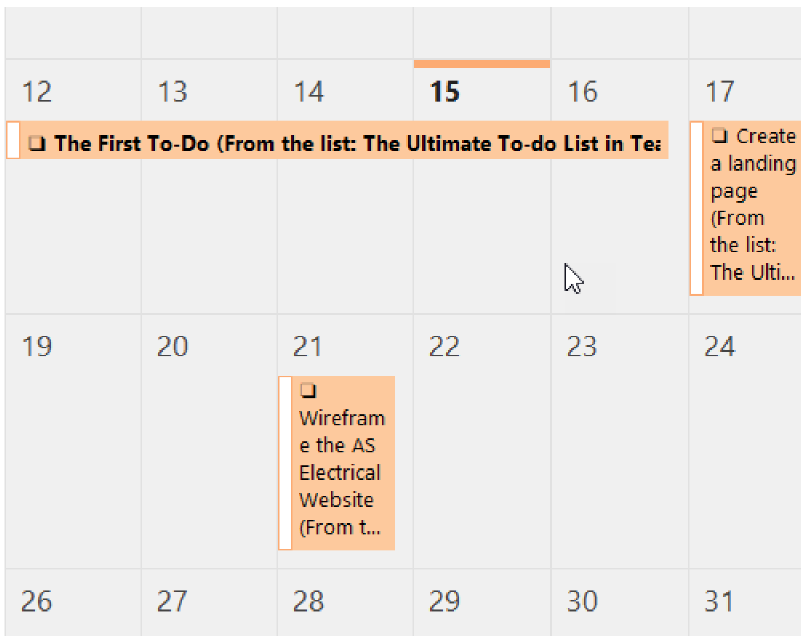
2. Click Add this Schedule to your Google Calendar, Outlook, or iCal… under the Your Schedule heading.



3. Click **Microsoft Outlook** in the list of calendars that appears.
4. If your browser shows a popup confirmation box, click **Open Outlook 2016** to proceed.



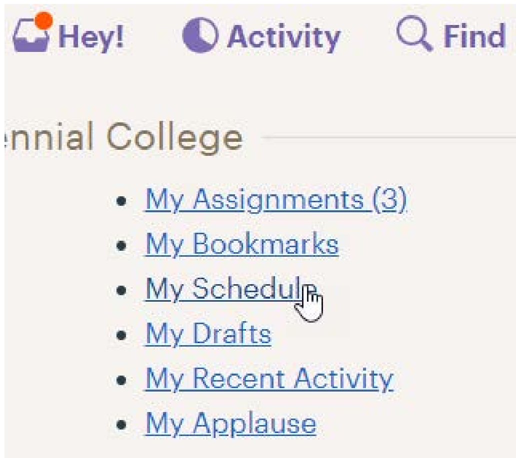
5. In Outlook, click **Yes** in the confirmation box to add the schedule to your calendar.
6. Your scheduled to-dos and assignments appear in the Outlook calendar.



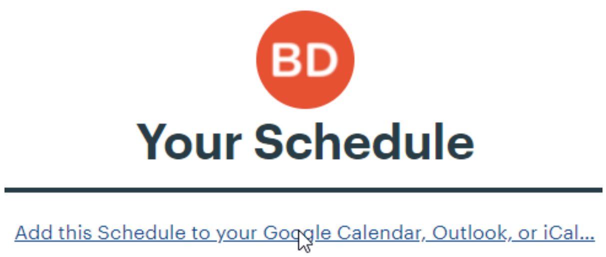
In Outlook, the current day is **bolded**. Past to-dos are **bolded**. Upcoming to-dos have no formatting.

Export to Google Calendar

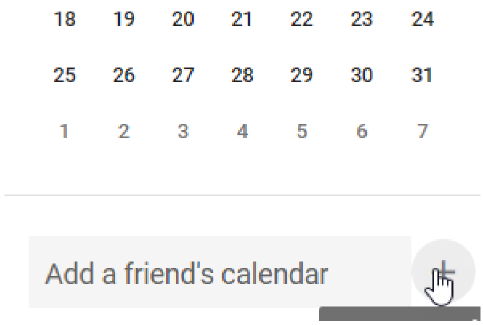
1. On the Basecamp home page, click **My Schedule** under the company name.



2. On the My Schedule page, click **Add this Schedule to your Google Calendar, Outlook, or iCal…** under the Your Schedule heading.

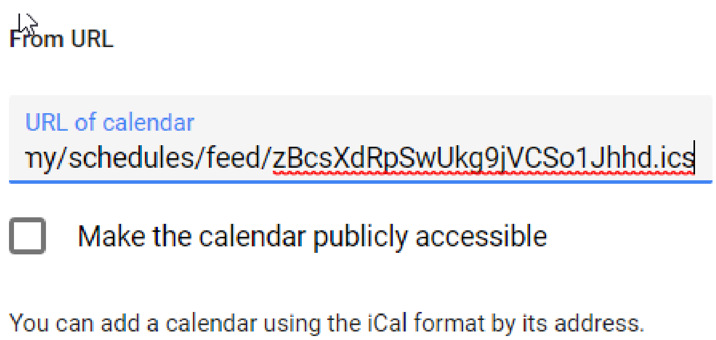


3. Click **Google Calendar** in the list of calendars that appears.
4. Press Ctrl + C (Cmd + C on Mac) to copy the link that appears under the Google Calendar list item.
5. Open https://calendar.google.com.
6. Next to the **Add a friend's calendar** field on the left sidebar, click the + symbol.



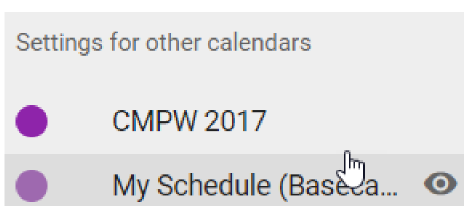
7. Click **From URL** in the dropdown menu. The URL addition page opens.

8. Paste the link you copied in Basecamp into the **URL of calendar** field.



9. Click **Add calendar** to finish the process.

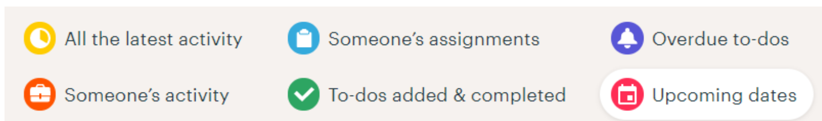
10. You can view the new calendar and manage it in Google Calendar by clicking the **My Schedule (Basecamp)** link in the list of calendars on the left.



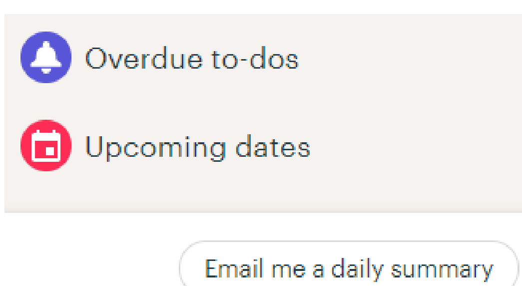
View Reports in Basecamp

Reports are summaries of all activity in Teams and Projects. Reports can be emailed to an administrator daily. This task shows you how to view reports for Teams, Projects, or individuals and sort the reports by different types. Finally, you can print reports as PDFs or documents from Basecamp.

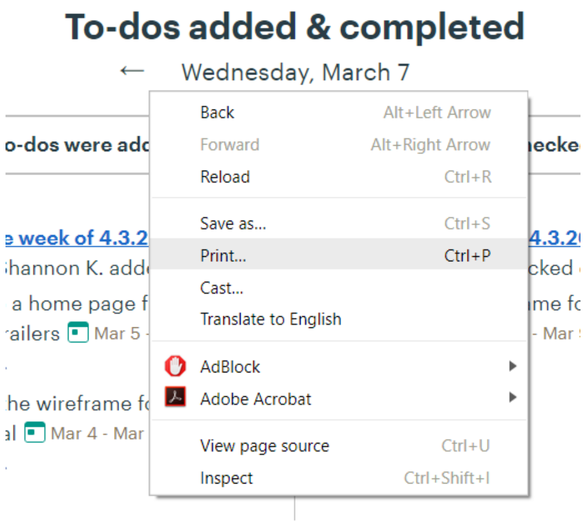
1. Open the Team or Project for which to view a report.
2. Click **Activity** on the navigation menu. The Activity page appears.



3. Do any of the following:
   - To view all recent activity, click **All the latest activity**.
   - To view a specific member's assignments, click **Someone's assignments**.
   - To see all overdue to-dos, click **Overdue to-dos**.
   - To see a specific member's activity including files uploaded and comments, click **Someone's activity**.
   - To view all completed to-dos, click **To-do's added and completed**.
   - To see upcoming to-dos, click **Upcoming dates**.
4. To have a report emailed to you daily, click **Email me a daily summary** on the same page.



5. To print a report, **right click** anywhere on the page. The browser options menu appears.



6. Click **Print...** in the drop-down menu.

7. Choose your printer options and click **Print**.

Basecamp