



Basecamp Overview 2014

Kathleen Mattson, millermattson.com

Agenda/Contents

1 Intro: What is Basecamp for and NOT for?

2 Projects

3 To-do Lists

4 Files and Text Docs (Notes)

5 Calendars

6 Summaries: Everyone - Me

Intro: What is Basecamp for?

Basecamp is mainly for organizing To-do Lists.

It is great for:

- Keeping info about projects organized.
 - Keep record of to-dos, discussions, and docs for each project.
- Keeping an *overall* calendar (more about this later!)

Key advantage: The whole team has access.

Intro: What is Basecamp NOT for?

Basecamp is NOT:

- A replacement for email.
 - Use Basecamp for communications specific to a “To Do” or Document in a project – otherwise, use email or IM.
- An everyday calendar.
 - The calendar in Basecamp is a tad clunky...
- A document repository.*
 - Basecamp is NOT a good place to store documents! Only upload things that are specific to a “To Do.”

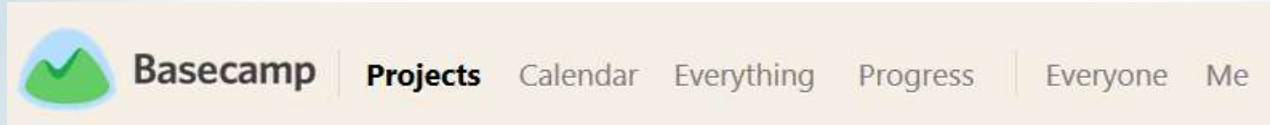
Intro: *Document Repository

Forgive a brief digression...

- I like Dropbox  and use it for EVERYTHING
 - Integrates with my regular file explorer and iPhone
 - Easy team folders
 - Automatic backup and recovery from accidental deletion
 - Saves previous versions
 - Easy to share (or NOT share)
 - Easy to send doc links
 - Does NOT have check-in/check-out version control

Projects

- Everything on Basecamp is organized into Projects.



- You only see Projects you are invited to.
- Need access to a project?
Ask your Basecamp administrator.

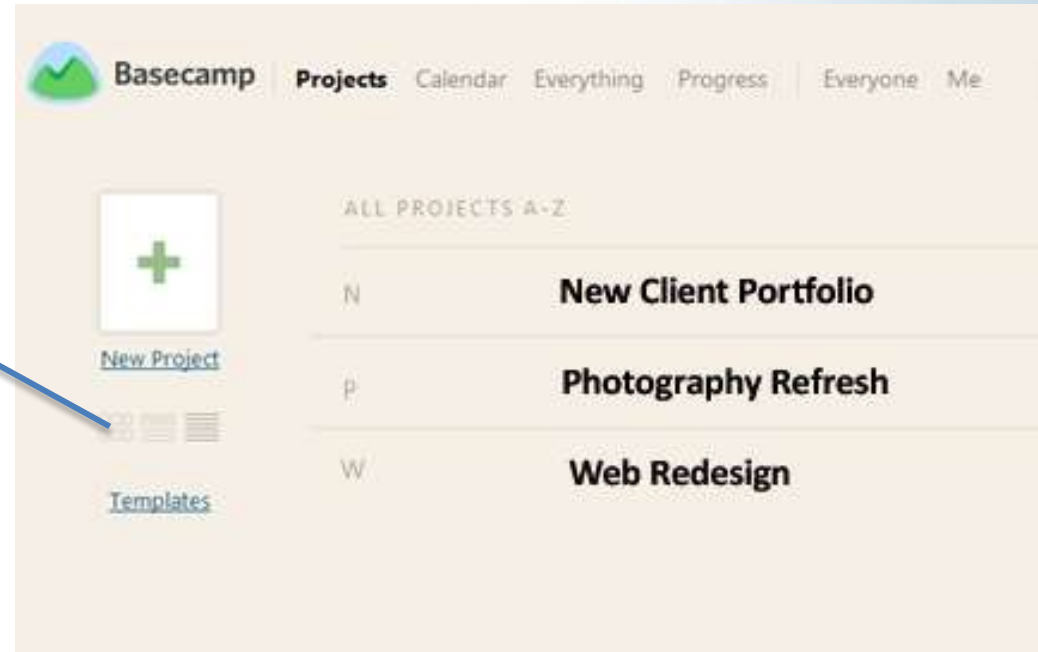
Projects: Tiles



Icons show who is in this project.
The “Everyone” summary
identifies them

Projects: List

- Switch between tiles and a list



What's in a Project?

Click a Project to see its summary page:

- Latest Project Updates
- Discussions
- To-do Lists
- Files
- Text Documents

To-do Lists

- Click the To-do List title if you want to see a summary
- Each list has multiple To-do items
- Look for items assigned to you
- Add comments or questions if necessary: Information should be as complete as possible so there are no questions.
- **Check it off when it is done!**

Creating To-do Lists and Items

- Choose a To-do List
 - Avoid the huge “miscellaneous” piles -- When not in a logical place, they get lost!
 - Create a new list of necessary
- Assign it to somebody
 - Even if you assign it to yourself
- Set a date (when possible)
- Add a comment IF it needs explanation

Attaching Files and Text Documents

- Only attach files that are needed for a To-do
 - Upload any file from your computer or Google Docs
- Text Documents are a convenient way to save lists
 - Click the “Create a Text Document” button
 - Be sure to Save it!
 - Add a comment or go into the To-do Item and refer people to the Text Doc that you created.

Calendar

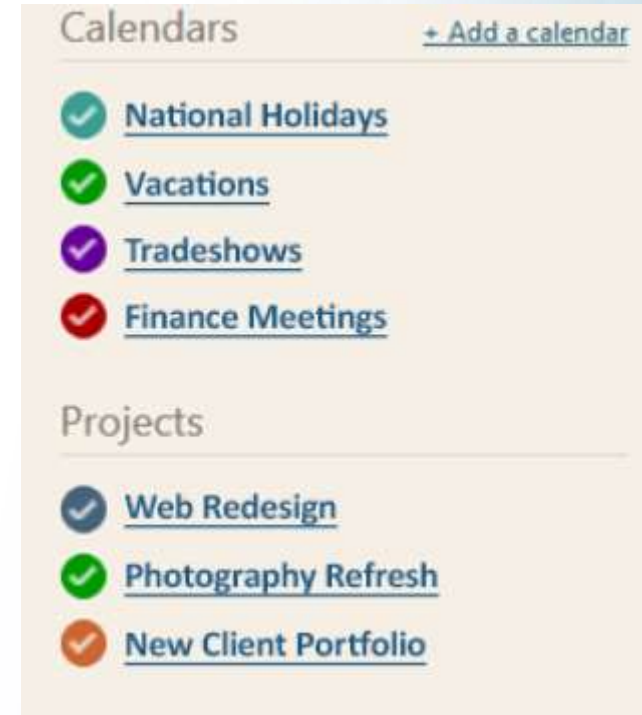
- Use the Calendar to post team Vacations, industry events, and recurring regular meetings



- You should use Outlook or your other regular calendar for your day-to-day use.

Calendar

- The calendar is color-coded.
- To-do items are also shown on the calendar
- Click a calendar or project on the list to see only those items



Add a Calendar item

- First click a calendar on the list to choose the color.
- Click a date on the calendar. This opens “New event”

The image shows a 'New event' dialog box with several callout boxes explaining its fields:

- Change the name**: Points to the 'New event' title field.
- Add a time unless it is an all-day or multi-day event**: Points to the 'any time' field.
- Does it repeat? (Weekly, monthly, etc.)**: Points to the 'Lasts multiple days or repeats...' link.
- Who should be notified and reminded?**: Points to the 'Email to:' field.
- What time should the reminder emails be sent?**: Points to the '7am' reminder time field.
- None, Day of, 1 Day Before, or 2 Days Before**: Points to the 'Day of the event at...' dropdown menu.
- If event lasts more than one day, then add the end-date**: Points to the 'When: June 20, 2014' field.

The dialog box itself contains the following fields and options:

- New event** (title)
- any time** (time)
- Add an optional note** (text area)
- When: June 20, 2014** (date)
- Lasts multiple days or repeats...** (link)
- Email to: Type a name or email address...** (text field)
- Reminder: Day of the event at...** (dropdown menu)
- 7am** (time)
- Add this event** (button)
- or Cancel** (link)

Summaries

- Summaries give you quick access to catch up on what is going on.
- Some are more useful than others.
“Me” is the most useful – so we’ll start there...

Summaries: Me



Basecamp

Projects

Calendar

Everything

Progress

Everyone

Me

- Click “Me” for:
 - A list of everything you have done in Basecamp
 - All the outstanding To-do Items assigned to you
 - Your completed To-do Items
 - Quick links to docs you have uploaded

Summaries: Everything



“Everything” shows you everything in Basecamp that you are involved with sorted by type of activity.

... Not terribly useful.



Summaries: Progress



Basecamp

Projects

Calendar

Everything

Progress

Everyone

Me

“Progress” shows you a timeline with links to everything in Basecamp that you are *directly* involved with, sorted by date, starting with TODAY at the top.

... Starting to get useful.

Summaries: Everyone



Basecamp

Projects

Calendar

Everything

Progress

Everyone

Me

“Everyone” shows you everyone’s icons.

Click a person to see what projects he/she is working on (depends on your basecamp rights).



[John Smith](#)



[Andrew Wiggins](#)



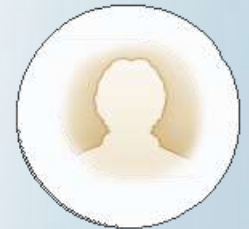
[Joe Blow](#)



[John Schmidt](#)



[Barnaby Hurst](#)



[Gomer Pyle](#)

That's the summary of how I've been using Basecamp with internal teams. I use spreadsheets for myself, but when I need to assign and manage tasks/To-dos with others, Basecamp works well.

Questions about Basecamp? Ask me!

kathleen@millermattson.com

