Patrice-Anne Rutledge

"The most comprehensive guide to Basecamp we've ever seen. If you want to know everything there is to know about Basecamp, this is the book for you."

—**Jason Fried**, Founder, 37signals (the company behind Basecamp)

Sams **Teach Yourself**

Basecamp®

in **10 Minutes**

SAMS

Sams Teach Yourself Basecamp® in 10 Minutes

ISBN-13: 978-0-672-33103-9
ISBN-10: 0-672-33103-9

Library of Congress Cataloging-in-Publication Data is on file.

Printed in the United States of America

First Printing February 2010

Trademarks

Warning and Disclaimer

Bulk Sales
Sams Publishing offers excellent discounts on this book when ordered in quantity for bulk purchases or special sales. For more information, please contact

U.S. Corporate and Government Sales
1-800-382-3419
corpsales@pearsontechgroup.com

For sales outside of the U.S., please contact

International Sales
international@pearson.com

Associate Publisher
Greg Wiegand

Acquisitions Editor
Michelle Newcomb

Development Editor
Joyce Nielsen

Managing Editor
Kristy Hart

Project Editor
Andy Beaster

Copy Editor
Sarah Kearns

Indexer
Lisa Stumpf

Proofreader
Sally Yuska

Technical Editor
Patrick Rhone

Publishing Coordinator
Cindy Teeters

Designer
Gary Adair

Compositor
Gloria Schurick

Introduction

One of the keys to an organization's success is the ability to effectively manage its projects. Regardless of the size or type of project you're managing, you need a solid, realistic plan. You then need to manage your plan closely to ensure that everyone involved is on track and in sync, that every step along the way is on schedule, and that you ultimately finish on time and on budget with a positive end result.

Many professionals whose specialty lies in an area outside of project management find that traditional project software is too complex or too difficult to involve team members in multiple locations. Basecamp offers an alternative: online, collaborative project management. With online applications such as Basecamp, there is no software to download, install, or maintain. Everyone involved in a project can log in from a computer, netbook, or mobile device to update and view project progress.

This book targets readers who actively manage projects with Basecamp (referred to as the account owner and administrators), but other Basecamp project team members who update and view their progress in the system can also benefit from its content.

Sams Teach Yourself Basecamp in 10 Minutes is designed to get you up and running on Basecamp as quickly as possible. It introduces you to essential project management concepts in plain English and focuses on real-world techniques for ensuring project success. Because online applications such as Basecamp roll out new features on a regular basis, the features available to you might vary from what's covered in this book. The companion website, however, will help keep you updated on what's new with Basecamp. For now, turn to Lesson 1, "Getting Started with Basecamp," to begin your journey with this powerful project management tool.

Who Is This Book For?

This book is for you if…

- You’re new to project management and want to manage your projects online.
- You want to become productive on Basecamp as quickly as possible and are short on time.

Companion Website

This book has a companion website online at http://www.patricerutledge.com/basecamp.

Visit the site to access the following:

- Book updates
- News about Basecamp enhancements and features
- Other books and courses that might be of interest to you

Conventions Used in This Book

The *Sams Teach Yourself* series has several unique elements that will help you as you are learning more about Basecamp. These include the following:

> NOTE: A note presents interesting pieces of information related to the discussion.

> TIP: A tip offers advice or teaches an easier way to do something.

CAUTION: A caution advises you about potential problems and helps you steer clear of disaster.

PLAIN ENGLISH: Plain English sections provide clear definitions of new, essential terms.

LESSON 4

Working with Projects

In this lesson, you learn how to create and manage your Basecamp projects.

Defining Projects

Before you set up your first project in Basecamp, you need to define the parameters of this project. If you're an experienced project manager and are just new to Basecamp, you probably already have a very clear idea about how to structure your projects.

But if you're new to project management, it might take a bit more effort to divide the work you need to accomplish into manageable projects. As you learned in Lesson 1, a **project** is a temporary endeavor undertaken to create a unique product, service, or result.

For example, if you run a service business, you could set up your clients as companies and create a new Basecamp project for each project you handle for each company. This works well if your projects are large, such as creating a website or planning a wedding. But if you work on many smaller projects for the same client, you could also create separate milestones and to-do lists for each and manage them under one project. This is particularly useful if your account plan limits your number of active projects, and you usually have many small projects at the same time.

Determining the best way to manage your projects is both art and science. Before you start, it's worthwhile to carefully consider the way your business operates, whether you have to follow any specific corporate guidelines in the way your group manages projects, the size and frequency of your projects, and the number of people involved in each project.

Fortunately, though, Basecamp is very flexible. If you don't like the way you initially set up your projects, you can change them.

> CAUTION: **Only Account Owners and Administrators Can Create Projects**
>
> In Basecamp, only account owners and administrators have permission to create projects. Regular users can't perform most of the tasks described in this lesson.

Creating a Project

To create your first project, follow these steps:

1. On the Basecamp Dashboard, click the Create Your First Project link. The Create a New Project page opens, shown in Figure 4.1.

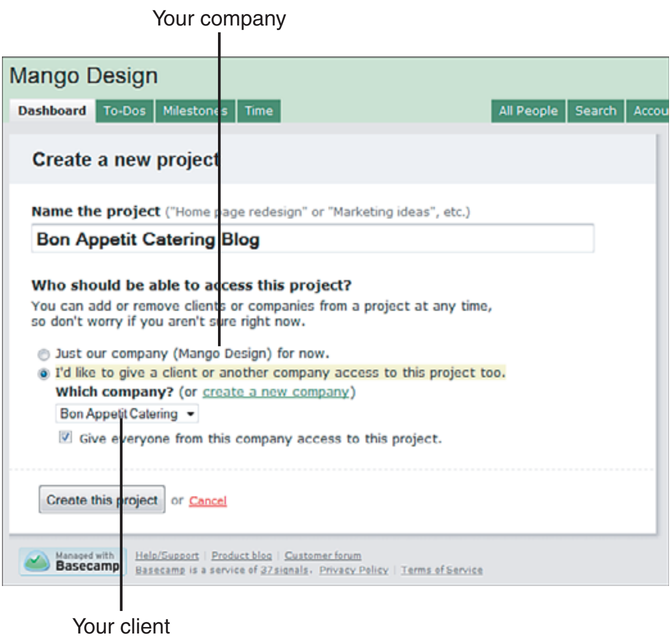

FIGURE 4.1 Create your first Basecamp project in minutes.

> NOTE: **Where's the Create Your First Project Link?**
> The Create Your First Project link appears on the Basecamp Dashboard only until you create your first project. After that, the initial content that appears on your Dashboard is replaced with details about your project activity. If this link is no longer on your Dashboard, you can also click the Create a New Project button on the right side of the dashboard.

2. Enter a name for your project in the Name the Project text box.
3. Specify who can access the project: only users in your company or users at another company as well.
4. If you're allowing users from another company to access your project, select that company's name from the drop-down list. Alternatively, click the Create a New Company link if you didn't set up external companies in Lesson 3.

> NOTE: **Determining Who Should Have Access to Your Project**
> Remember that Basecamp is a collaboration and communication tool. Including clients, partners, and vendors in your Basecamp project fosters this collaboration.

5. Click the Create This Project button.

The Overview page for the project opens, shown in Figure 4.2.

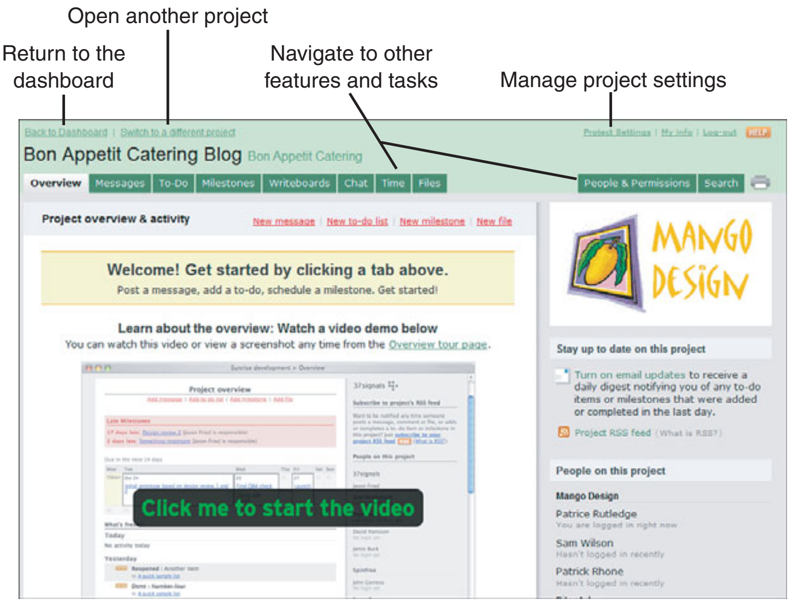

FIGURE 4.2 The Overview page is "command central" for each Basecamp project.

When you first create a project, the Overview page displays a welcome screen with a brief video tutorial to get you started. After you start entering project milestones and to-dos, this content is replaced with actual project data.

From the Overview page, you can do the following:

- Navigate to other project features by clicking one of the tabs to the right of the Overview tab. Depending on the account plan you sign up for, tabs include Messages, To-Do, Milestones, Writeboards, Chat, Time, and Files. You'll learn more about these Basecamp features in later lessons. If one of these tabs is missing from your screen, your account plan doesn't support this functionality.

- Start entering project data by clicking one of the shortcut links to perform common tasks, such as New Message, New To-Do List, New Milestone, or New File.
- Return to the Dashboard by clicking the Back to Dashboard link in the upper-left corner of the screen. Depending on your account plan and number of projects you have, the Back to Projects link could appear instead.
- Open a different project by clicking the Switch to a Different Project link in the upper-left corner of the screen. If you have a free account, the Upgrade Your Free Account link appears instead. If you have only one project, this link isn't available.
- Manage project settings, such as creating an overview page announcement or defining a start page, by clicking the Project Settings link in the upper-right corner of the screen. See "Managing Project Settings" later in this lesson for more information.
- Manage project-specific people and permissions by clicking the People & Permissions tab. See "Assigning People and Permissions to Projects" later in this lesson for more information.
- Search for project data by clicking the Search tab. See "Searching Project Data" later in this lesson for more information.
- Print the contents of the active page by clicking the Printer icon. Basecamp displays a print preview of the page contents and opens the Print dialog box where you can choose a printer.

TIP: **Create a PDF with Your Basecamp Data**

You can also save your Basecamp data to PDF if you've installed software that enables you to print to PDF from the Print dialog box. Some PDF creation tools include Adobe Acrobat, NitroPDF, or PDF995.

- Receive a daily email digest of project activity by clicking the Turn on Email Updates link. You'll receive updates on new and completed to-dos and milestones. If there is no new project data, you won't receive an email.

> TIP: **Unsubscribe if the Daily Emails Aren't Useful**
>
> To unsubscribe to the daily email digest, click the See Details About the Digest or Unsubscribe link that appears after you subscribe.

- Subscribe to the RSS feed for this project. See Lesson 14, "Working with RSS Feeds," for more information about the benefits of RSS.
- View a list of people assigned to this project by company as well as by the last date they logged in.

You're probably eager to start entering project data, but first, review the rest of this lesson for important information about managing your project. In particular, you'll want to assign any project-specific permissions and manage your project settings.

Assigning People and Permissions to Projects

In Lesson 3, "Managing People, Companies, and Permissions," you added companies and people to your Basecamp system and gave them permission to access specific data. You can also assign permissions at the project level on the People & Permissions page.

To assign people and permissions to a specific project, follow these steps:

1. From the Basecamp Dashboard, click the link of the project you want to edit from the Your Projects list (if it isn't already open).
2. Click the People & Permissions tab to open the People & Permissions page, shown in Figure 4.3.
3. Click the Add People, Remove People, Change Permissions link on the People & Permissions page. Figure 4.4 shows the page that opens.

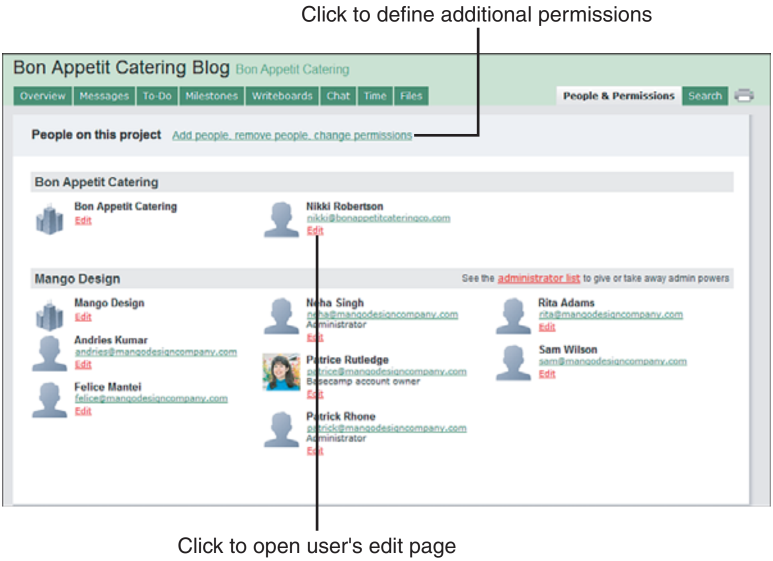

FIGURE 4.3 The People & Permissions page is very similar to the All People page you explored in Lesson 3.

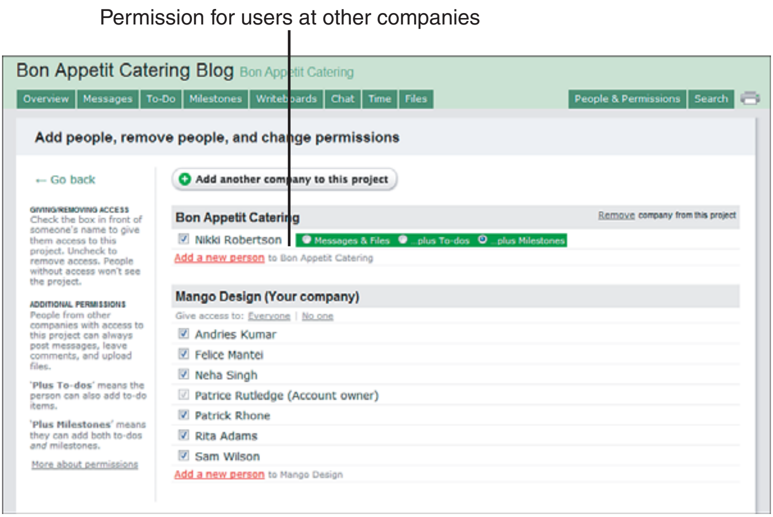

FIGURE 4.4 Specify project-specific permissions on this page.

The Add People, Remove People, and Change Permissions page displays a list of the companies and people you gave access to the project when you created it. You can change or refine these permissions on this page at any time as long as your project is still active.

On this page, you can do the following:

- Select users from other companies who require access to this project by placing a checkmark before their name. You'll notice that to the right of the name of each person at an external company, there are three option buttons. These are: Messages & Files, Plus To-Dos, and Plus Milestones. By default, people from other companies can post messages, leave comments, and upload files. Optionally, you can give them permission to enter to-dos and milestones as well.

> TIP: **You Can Remove Access as Easily as You Can Grant It**
>
> To take away a user's permission to access this project, remove the checkmark before that person's name.

- Select users from your company who require access to this project by placing a checkmark before their name. The account owner receives access by default. You can't remove this person.

> TIP: **Save Time by Granting Global Access Rights**
>
> If you have a long list of users for your company, you can quickly change permissions for all users by clicking either the Everyone or No One link.

- Add a new person to a company by clicking the Add a New Person link below the company this person works for. The Add a Person page opens, described in Lesson 3.

- Add a company to this project by clicking the Add Another Company to This Project button. The page expands to show additional fields (see Figure 4.5). Select a company from the Choose a Company drop-down list and click the Add Company button. Basecamp adds this company to the page. If no other companies exist, the Enter a New Company Name text box appears instead of the drop-down list. Enter the company name and click the Create and Add Company button.

FIGURE 4.5 Give additional companies access to your project.

> NOTE: **Add a New Company to Your Basecamp System**
> If you want to add a new company to the project, and to your Basecamp system, click the Create a New Company link. See Lesson 3, "Managing People, Companies, and Permissions," for more information about adding new companies.

- Remove a company from the project by clicking the Remove link to the right of the company.

Updating Project Permissions on the Edit Page

Now that you've added your first project, the Edit page for each of your Basecamp users includes new project access fields.

To access the Edit page, click the Edit link below the name of any person on the People & Permissions page. You can also perform this same task on the All People page.

Figure 4.6 shows the [First Name] Can Access section that now appears on the Edit page for all users except the account owner.

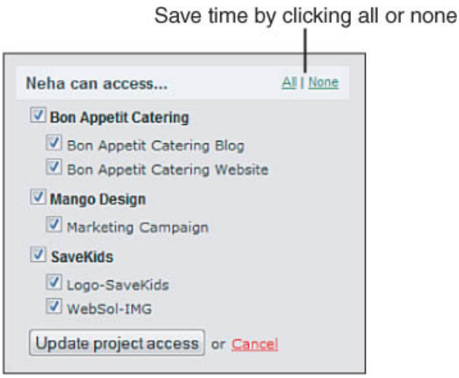

FIGURE 4.6 Give an individual user access to specific projects.

In this section, you can specify project access for each individual person. Be sure to click the Update Project Access button to save your changes.

Understanding What Users Can View on Projects

Remember, what you can view as an account owner or administrator on Basecamp project screens differs from what your users see. For example, in Figure 4.4, user Nikki Robertson received permission to access messages, files, to-dos, and milestones. Figure 4.7 shows what she sees when she opens the Overview page for a new Basecamp project with no project activity. Figure 4.8 shows her screen view after project activity has started.

As you can see, many of the tabs and links that appear on an account owner's or administrator's Overview page aren't available on that same page for a regular user, even one who has received the highest level of access permission.

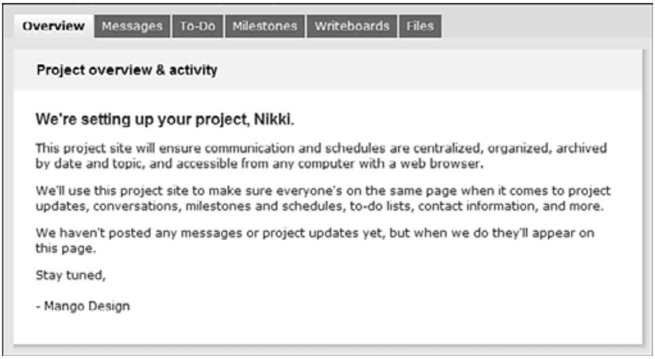

FIGURE 4.7 The initial Overview page for a regular user differs from what the account owner or administrator sees.

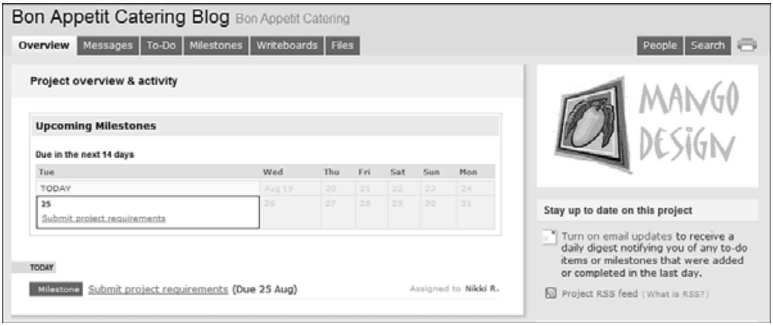

FIGURE 4.8 Project users have access only to the features you give them permission to view.

Managing Project Settings

The Project Settings page enables you to define project parameters when you first set up a project, as well as manage these settings throughout the project lifecycle.

From the Basecamp Dashboard, click the link of the project you want to edit from the Your Projects list. Next, click the Project Settings link on the upper-right corner of the screen.

The Project Settings page for that project opens, shown in Figure 4.9.

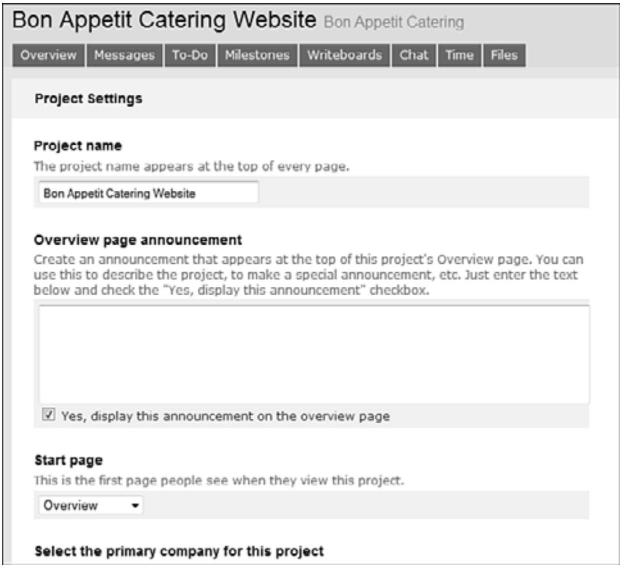

FIGURE 4.9 Update project settings before you start entering project data.

> NOTE: **Where's the Project Settings Link?**
>
> The Project Settings link enables you to manage settings for a specific project and is therefore available only when you're viewing a project. It doesn't appear on the Dashboard. In addition, you must be the owner or an administrator to change account settings.

The remainder of this section describes tasks you can perform on the Project Settings page. Be sure to click the Save Changes button at the bottom of the page to ensure that your changes take effect.

Renaming a Project

The name you entered when you created your project appears in the Project Name text box, but you can change this at any time.

Creating an Overview Page Announcement

If you want to communicate specific information to project team members, enter your message in the Overview Page Announcement section. Then, select the Yes, Display This Announcement on the Overview Page checkbox.

For example, you could post a project overview, project updates, an urgent message for team members, and so forth.

Defining Your Start Page

By default, Basecamp displays the Overview page when you first view a project. You can display another page, however, as your default initial view. To do so, select one of the following pages from the drop-down list in the Start Page section: All Messages, To-Dos, or Milestones.

Selecting the Primary Company for a Project

When you set up a project, you specified the primary company for it. To change this, select a new company in the Select the Primary Company for This Project section. A drop-down list displays all available companies.

The Basecamp Dashboard lists this project under the heading of the company you choose here. See Lesson 13, "Viewing Project Activity on the Dashboard," for more information.

Archiving a Project

When you archive a project, you essentially "freeze" it. You can still view project data, but no one can edit it or add any new data. An archived project doesn't count toward any project limits that your current account plan specifies. See Lesson 1, "Getting Started with Basecamp," for a reminder of how many active projects you can maintain.

To archive a project, select the Archived option button in the Project Status section of the Project Settings page, shown in Figure 4.10.

FIGURE 4.10 Basecamp gives you three choices of project status.

> TIP: **Provide New Users Access to Archived Projects**
>
> At times, you might want to give a person the ability to view an archived project who wasn't involved in the original project. To enable a new person to view an archived project, you must temporarily reactivate the project and then give this person access on the Edit page. You can access this page by clicking the Edit link below that person's name on either the All People page or the People & Permissions page.

Reactivating an Archived Project

If you want to edit or add content to an archived project, you must reactivate it. To do so, select the Active option button on the Project Settings page.

Remember, reactivating an archived project means that it now counts toward the total number of projects allowed for your account plan. If you've already reached your maximum, you won't be able to reactivate a project until you archive or delete another.

Placing a Project on Hold

If you don't want project data such as milestones, messages, comments, and to-dos to appear on the Basecamp Dashboard, you can place a project on hold. To do so, select the On Hold option button on the Project Settings page.

An on-hold project still counts toward the project limit for your account plan. You can also still actively add and enter project data. In essence, placing a project on hold is a way to continue working on it while "hiding" its data from the Dashboard.

Deleting a Project

To delete a project, click the Yes, I Understand—Delete This Project link on the right side of the Project Settings page. A dialog box opens, where you can confirm that you really want to delete the project.

> CAUTION: **There Is No Way to Undo a Project Deletion**
>
> When you click this link, Basecamp permanently deletes your project. Consider carefully whether archiving your project better suits your needs.

Searching Project Data

On large projects, it's sometimes difficult to find the exact information you need. For example, if you have hundreds of messages and comments, it could take you a while to find the specific one where someone mentioned something about logo colors. To find information faster, use Basecamp's search feature to search for words or phrases mentioned in messages, comments, milestones, to-dos, and files.

To perform a search, follow these steps:

1. On any page in the project you want to search, click the Search tab.
2. On the Search page, enter the topic you want to search for in the text box. Search terms aren't case-sensitive, so searching for "Flash" and "flash" return the same results, for example.

> TIP: **Search All Basecamp Projects at the Same Time**
>
> If you want to search all Basecamp projects, click the All Projects link before entering your search term.

3. Click the Search button. Basecamp searches the project data and displays a list of matches, shown in Figure 4.11.

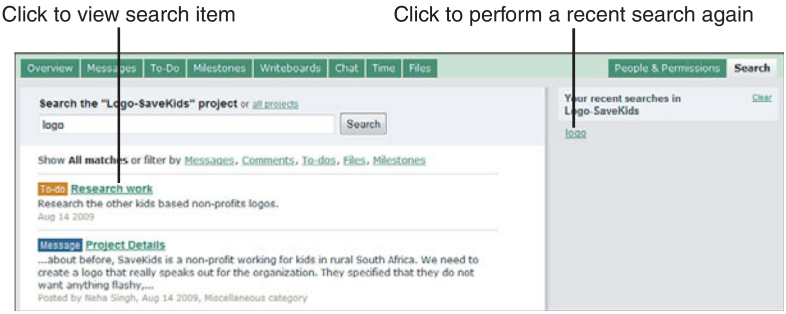

FIGURE 4.11 Search large projects for the exact information you need.

4. If your search returns a long list, you can filter Messages, Comments, To-Dos, Files, or Milestones.

5. Click the title of the item you want to view.

Basecamp displays a list of your recent searches on the right side of the screen. You can click the link for any of these previous searches to perform the search again on the latest project data. If you no longer want to view your previous searches, click the Clear link.

Creating Subprojects

Although Basecamp doesn't officially support subprojects, there's an easy way to create them. Use companies as categories, and the projects assigned to these companies become subprojects for that category.

For example, let's say that your company, Mango Design, works on both web design and print design projects. You also want to use Basecamp to manage several internal projects. You could create companies called "Web Design Projects" and "Print Design Projects" to act as categories for your subprojects and use your main company to house your internal projects.

Summary

In this lesson, you learned how to create and manage projects, as well as how to provide your users with project-specific permissions. Now it's time to start entering milestones.

Index

A

B

C

D

E

F

G

H

I

J-K

L

M

N

O

P-Q

T

U

V

W

X

Y-Z