

Quick guide to Basecamp

Supercool's project management tool

Introduction	1
Project Overview	1
Inviting project members	3
Updating/discussing a task	4
Assigning tasks and deadlines	5
Viewing deadlines/events	6
Viewing Files	7
Emailing the project	8
Signing off tasks	10
Useful Resources	10

Introduction

Basecamp is a cloud based project management tool. We'll be using it do the following things:

- Communicate between project members
- Add, update and work on specific to-dos
- Store important files and documents
- Confirm sign-off for specific areas of the project

Your Supercool project manager will invite you and key members of your team to the Basecamp project.

It's a simple interface and easy to use, but in case you get stuck, here are a few pointers.

Project Overview

When you log in, you'll see a list of to-dos with checklists:

The screenshot shows the Basecamp interface for a project named "The Supercool Theatre". At the top right, there are links for "Invite more people" (2 people on this project) and "Catch up" (on recent changes). Below the project name, there are tabs for "46 To-dos" and "Events", and a section to "Add the first:" with options for "Discussion", "File", and "Text document".

The "Latest project updates" section shows three recent actions:

- 11:22am You added a to-do: [Add project brief docs to Basecamp](#)
- 11:22am You added a to-do: [Intro to Basecamp](#)
- 11:22am You added a to-do: [Invite relevant people to basecamp project](#)

A link "See all updates" is provided below the updates.

The "To-do lists" section has an "Add a to-do list" button and a link to "Watch a quick video about To-Do Lists".

Under "Project Kick Off", there is a checklist:

- Invite relevant people to basecamp project
- Book in project kick off meeting
- Intro to Basecamp
- Add project brief docs to Basecamp

An "Add a to-do" link is located below the checklist.

Under "Discovery", there is another checklist:

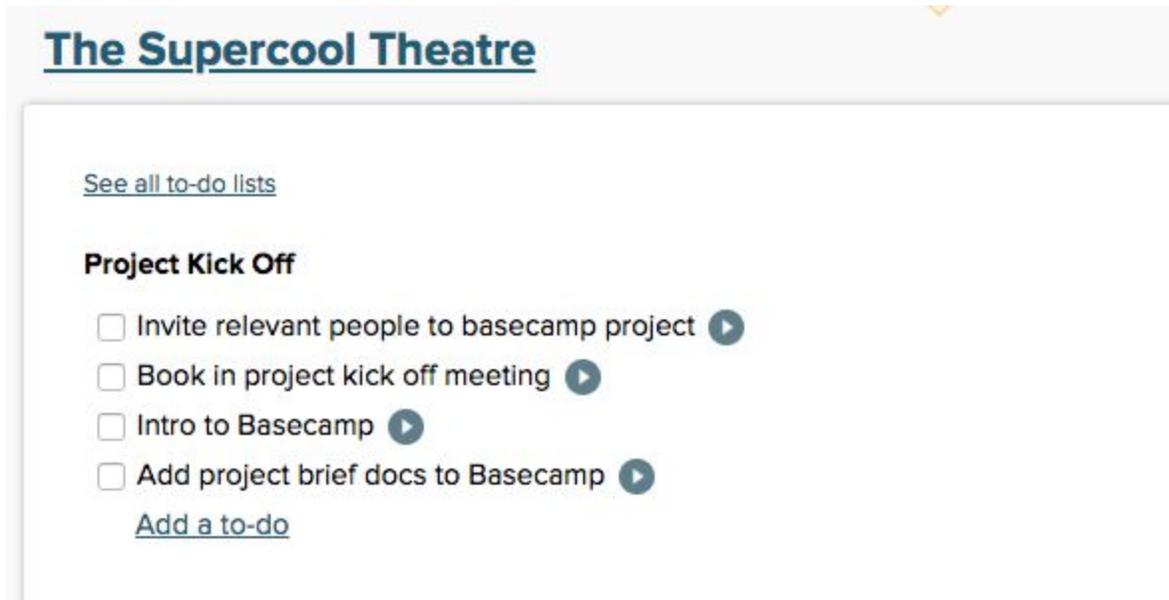
- Confirm dates for discovery
- Run workshops with relevant teams
- Review discovery and report back (Unassigned)
- Add discovery notes to Basecamp

An "Add a to-do" link is located below the checklist.

The "Design" section is partially visible at the bottom.

At the very top of the page you'll see the most recent events - these are things users have done within the project recently e.g. added a comment or completed a task

You can navigate to any specific to-do list or task by clicking on the title. E.g. clicking on 'Project Kick Off' will display just that to-do list:



The screenshot shows a web interface for 'The Supercool Theatre'. At the top, the title 'The Supercool Theatre' is displayed in a blue, underlined font. Below the title, there is a link 'See all to-do lists'. The main section is titled 'Project Kick Off' and contains a list of four tasks, each with an unchecked checkbox and a right-pointing arrow icon:

- Invite relevant people to basecamp project
- Book in project kick off meeting
- Intro to Basecamp
- Add project brief docs to Basecamp

At the bottom of the list is a link 'Add a to-do'.

You can drag/drop to-dos to re-order them.

As items are marked as done (by ticking in the little box next to each task) they will disappear from the main to-do list and appear underneath the main list:

The Supercool Theatre

[See all to-do lists](#)

Project Kick Off

- Book in project kick off meeting ▶
- Intro to Basecamp ▶
- Add project brief docs to Basecamp ▶

[Add a to-do](#)

- Invite relevant people to basecamp project ▶ (Completed by Kate Mroczkowski on 10 Sep)

Discuss this to-do list



Add a comment or upload a file...

[By-the-minute history for this to-do list..](#)

Inviting project members

We'll be inviting key people, but you might need to invite extra people as the project progresses. Note that only people who are actively working on the project, or people who would like to see progress on the project should be invited.

To invite people select 'Invite more people' from the top right hand corner:

Basecamp 2 **New stuff!** | Projects | Calendar | Everything | Progress | Everyone | Me | [Sign out](#)

Jump to a project, person, label, or search...

The Supercool Theatre ☆

[Invite more people](#) [Catch up](#)
3 people on this project on recent changes

1 Discussion 46 To-dos 2 Files 1 Forwarded email Events | Add the first: [Text document](#)

Latest project updates

- 11:46am** Kate M. forwarded an email: [Training Session](#)
- 11:39am** Kate M. commented on [Intro to Basecamp](#)
- 11:36am** Kate M. gave katedfindlay@gmail.com access to the project: The Supercool Theatre

Once selected, you can invite people by email:

The Supercool Theatre

Here's who's on this project

Invite people to this project and start working together in seconds. Everyone you invite will receive a welcome email.

To add more people, type names or email addresses:

[Watch a quick video about inviting your team](#)





Add a personal welcome message:

Hi there. We'll be using Basecamp to share ideas, gather feedback, and track progress during this project. Simply log in or create an account and you'll be up and running in no time.

[Send Invitation](#)



James Coleman

james@supercooldesign.co.uk

The account owner has access to all projects.



Kate

katedfindlay@gmail.com



Kate Mroczkowski

kate@supercooldesign.co.uk

Updating/discussing a task

To update a task, find the relevant task and click on the task title. From here, you can add comments, files or complete a task.

When adding comments to the task, be sure to select the relevant people to notify. You might not need to notify everyone of the update:

Intro to Basecamp ▶ Unassigned

Discuss this to-do



Bold *Italic* Bullets Numbers **Quote**

Hello,

Just sending you the Basecamp intro doc, let me know if you have any questions.

Kate

To attach files drag & drop here or [select files from your computer...](#) or [Google Docs...](#)

Basecamp intro.docx

Who should receive updates?
Since this project isn't published yet, we won't email anyone about this comment now. People you check below will be notified when new comments are added after the project is published.

[Select all](#) | [Select none](#)

James Coleman

Add this comment

Regardless of who you notify, all project members will be able to view the task and comments.

Assigning tasks and deadlines

For each task, you can add an assignee and deadline. To do this from the project overview, hover over the relevant task, you'll see an 'Unassigned' button appear to the right of the task title, select this to add an assignee (only people who have joined the project) and a deadline:

Project Kick Off

- Book in project kick off meeting  **Kate · Wed, Oct 17**
- Intro to Basecamp  1 comment
- Add project brief docs to Basecamp 
- Invite relevant people to basecamp project 

[Add a to-do](#)

Discovery

- Confirm dates for discovery 
- Run workshops with relevant teams 
- Review discovery and report back 
- Add discovery notes to Basecamp 

[Add a to-do](#)

Assign this to-do to:

Kate

The person you select will be notified by email

Set the due date:

← October 2018 →

S	M	T	W	T	F	S
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

[No due date](#)

You can also update this from within the task.

Viewing deadlines/events

In Basecamp an event is something that takes place, or needs to take place, on a certain day. Most tasks will have deadlines assigned to them. You can see an overview of these in the calendar. Select Events from the top menu:

The Supercool Theatre ☆

[Invite more people](#)
3 people on this project

[Catch up](#)
on recent changes

[1 Discussion](#) [46 To-dos](#) [2 Files](#) [1 Forwarded email](#) [Events](#) Add the first: [Text document](#)

Once done, you'll see an overview of the tasks in a calendar format (note, only tasks with a date attached will appear here):

[Learn more about Events](#)

Project calendar

Agenda view < Next 6 weeks > [Calendar settings...](#)

Sun	Mon	Tue	Wed	Thu	Fri	Sat
9	Today 10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	October 1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20

1 To-do

- Book in project kick off...

List: Project Kick Off

- Book in project kick off meeting Kate

Viewing Files

To view files, select Files from the top menu:

The Supercool Theatre ☆

46 To-dos **1 File** Events Add the first: Discussion Text document

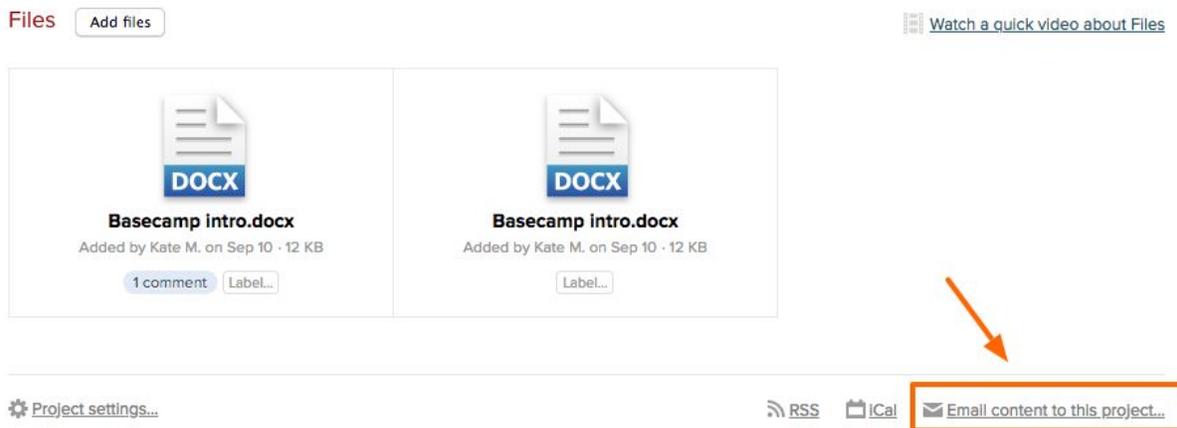
You can also add additional files to the project and attach them to comments on tasks.

Emailing the project

When someone is notified of an update to a task, they will receive an email.

Project members can log into Basecamp to view and reply to the task, or they can reply straight from their inbox to add their comment to the project.

Occasionally, you might want to forward an email to the project (this usually happens when someone's forgotten to use Basecamp to send information). To do this, first you need to get a unique email address from Basecamp. Navigate to the very bottom of the project and select 'Email content to this project':



There are full instructions in Basecamp on what to do next as well as a unique email address for the project:

How to add content to this Basecamp project via email



Starting discussions
via email



Making to-do lists
via email



Creating documents
via email



Uploading files
via email



Forwarding emails
to Basecamp



How to start a discussion in this project via email

- 1 Write a new email to:
project-15807659-65ac0581dcc80e314cae0e66@basecamp.com
Note: This address is personalized for you so don't share it with anyone else. Each user will see their own unique email address on this page. (If someone else got a hold of it, you can [reset it](#)).
- 2 Start the subject line with **Discussion:** followed by the title of your message.
For example... **Discussion: Q3 Sales Figures**
- 3 Write the text of your message in the body of the email.
- 4 Send the email.

Once the email is sent to the project, you will find it as a stand alone task. You can view this at the bottom of the project (or if it's a recent update, you'll spot it at the very top):

The screenshot shows a Basecamp project interface. At the top, there is a 'Files' section with an 'Add files' button and a link to 'Watch a quick video about Files'. Below this, two document cards are displayed, each titled 'Basecamp intro.docx' and added by 'Kate M.' on 'Sep 10' with a size of '12 KB'. The first card has '1 comment' and a 'Label...' button. Below the files, a section titled 'Forwarded emails' is highlighted with an orange border. It contains two entries, each titled 'Training Session' and forwarded '13 seconds ago' by 'Kate Mroczkowski'. At the bottom of the page, there are links for 'Project settings...', 'RSS', 'iCal', and 'Email content to this project...'.

Once in the project, you can reply from within the project.

Signing off tasks

Throughout the project there are some things we'll need you to sign off (for example, the designs or the dev site before go live). There are tasks set up in the project that you will need to complete, we'll take this as confirmation you're happy and signing off this part of the project.

Useful Resources

If you want some help with using Basecamp, here are a few useful resources:

- Intro to [Basecamp video](#)
- [Basecamp help pages](#)