Patrice-Anne Rutledge

Sams Teach Yourself Basecamp®

in 10 Minutes

SAMS

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About the Author

Patrice-Anne Rutledge is a business technology expert and author of 30 books who has been featured on MSN, AOL, CNN, Inc., CareerBuilder, Fox News, and other media outlets around the world. She specializes in teaching others to maximize the power of new technologies such as social media and online collaboration to manage and grow their businesses. Patrice has extensive project management experience, managing large, global projects for leading Silicon Valley technology firms. She can be reached through her website at www.patricerutledge.com.

Dedication

To my family, with thanks for their ongoing support and encouragement.

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We Want to Hear from You!

As the reader of this book, *you* are our most important critic and commentator. We value your opinion and want to know what we're doing right, what we could do better, what areas you'd like to see us publish in, and any other words of wisdom you're willing to pass our way.

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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.

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LESSON 1

Getting Started with Basecamp

In this lesson, you learn the basics of collaborative project management with Basecamp as well as how to set up your Basecamp account.

Introducing Online, Collaborative Project Management

Basecamp (http://basecamphq.com) is an online project management tool that emphasizes collaboration and communication over a reliance on traditional project charts, graphs, and statistics. With more than 3 million users around the world, Basecamp's many customers include Kellogg's, Sun Microsystems, the Mayo Clinic, National Geographic, and The World Bank, as well as many small businesses and nonprofits.

PLAIN ENGLISH: **Projects and Project Management**

According to the Project Management Institute, a **project** is a temporary endeavor undertaken to create a unique product, service, or result. **Project management** refers to the organized and coordinated effort to complete that project.

With Basecamp, you can do the following:

- Collaboratively manage multiple projects and people
- Create, edit, and reuse to-do lists
- Create, track, and manage project milestones

- Integrate with calendaring systems
- Post and share messages with project teams
- Upload and share project files, including documents, audio, and video
- Track and manage project time
- Collaborate using writeboards and online chat functionality
- Create and view RSS feeds
- Access project data on your mobile device
- Extend Basecamp functionality with dozens of third-party tools and applications

> NOTE: **Basecamp History**
>
> Basecamp was released in 2004 by 37signals (http://37signals.com), a Chicago-based web design firm founded in 1999. After the success of Basecamp, 37signals changed its business model from web design to software development, releasing other popular web-based applications such as Backpack, Campfire, and Highrise.

Basecamp follows the Software as a Service Model (SaaS), which offers access to software as a web-based service. With Basecamp, there is no software to download. Everything is hosted on Basecamp's own state-of-the-art servers.

> NOTE: **Is My Data Secure?**
>
> If you're new to the concept of hosted software and have some questions about data security, read Basecamp's security overview at http://37signals.com/security.

You access Basecamp via a browser such as the following:

- Internet Explorer 7 or later (for the PC)
- Firefox 2 or later (for the Mac, PC, or Linux)
- Safari 2 or later (for the Mac)

TIP: **Focus on Embracing a New Way to Manage Projects**

If you're used to traditional project management software such as Microsoft Project or have completed training in formal project management methodologies, Basecamp will be a new experience for you. Instead of trying to compare features or figure out how to create a baseline or calculate the critical path (not part of the Basecamp model), focus on embracing a new, streamlined way to manage projects.

Understanding Basecamp Account Plans

Basecamp offers numerous account options, including a free account and several types of paid accounts. Basecamp accounts vary by feature and monthly price. When choosing the right plan for you, consider carefully your project management requirements. You can always upgrade to another plan, but it's a good idea to start with a plan that will work for at least the next three to six months.

All plans include enhanced security and the ability to support unlimited users. The features that differentiate the available plans include the following:

- **Number of projects**. Depending on the plan you choose, Basecamp limits the number of active projects you can maintain. Archived projects don't count toward this limit.

PLAIN ENGLISH: **Active vs. Archived Projects**

In Basecamp, an **active project** is a project in progress. With an active project, you can add to-dos and milestones, share files, collaborate with others, and modify data. When you complete a project, you can archive it. You can view an **archived project**, but you can't modify its contents unless you reopen it as an active project. See Lesson 4, "Working with Projects," for more information about active and archived projects.

- **Amount of storage**. Most Basecamp plans enable you to upload and share files, with varying amounts of storage space available to you. In addition to documents, pictures, audio, and video that you upload, both active and archived projects count toward your storage limit.
- **Time tracking**. If you want to track the time your project team spends on tasks and create time-tracking reports, you need a plan that includes this feature.

Table 1.1 shows the differences between the available Basecamp account plans.

TABLE 1.1 Basecamp Account Plans

Plan	Projects	Storage	Time Tracking	Monthly Price
Max	Unlimited	75 GB	Yes	$149
Premium	100	30 GB	Yes	$99
Plus	35	15 GB	Yes	$49
Basic	15	5 GB	No	$24
Personal	3	1 GB	No	$12
Free	1	None	No	None

The Personal plan isn't available when you initially sign up, but you can upgrade or downgrade to it after you're a Basecamp customer. If you choose the Max plan, you receive a premium Campfire account at no charge, normally priced at $49 per month. Campfire (http://campfirenow.com) is 37signal's group chat tool for business. See Lesson 12, "Working with Chat Functionality," for more information.

Signing Up for a Basecamp Account

Signing up for a Basecamp account is a simple, straightforward task. If you choose a paid account, you receive your first 30 days free as a trial.

Figure 1.1 shows the screen that greets you the first time you visit Basecamp (http://basecamphq.com).

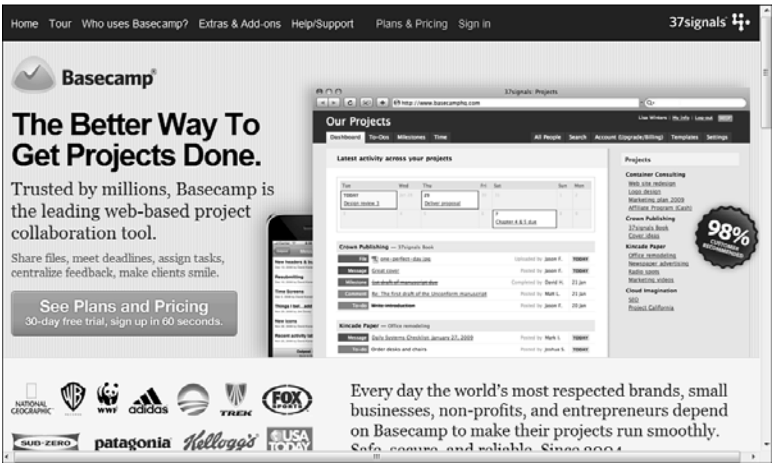

FIGURE 1.1 You can quickly sign up for a trial account from Basecamp's home page.

To sign up for a Basecamp account, follow these steps:

1. Click the Plans & Pricing link on the top navigation menu of Basecamp's home page.
2. Click the Sign Up button for the plan you prefer: Max, Premium, Plus, or Basic. The Sign Up page opens, shown in Figure 1.2.

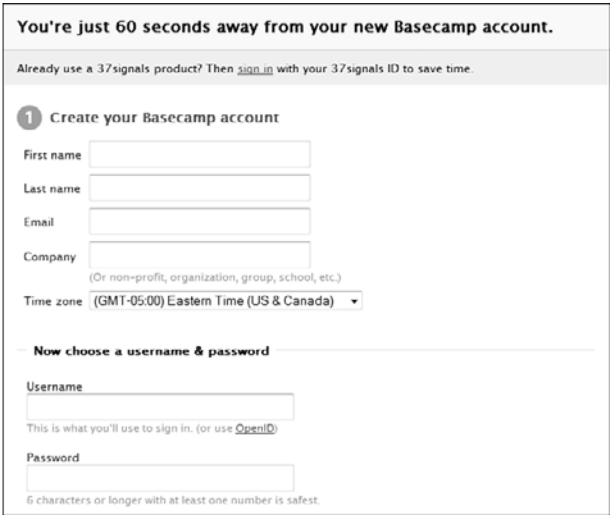

FIGURE 1.2 Enter your account and credit card information on the Sign Up page.

PLAIN ENGLISH: **37signals ID**

37signals ID is 37signals' single sign-in system that enables you to create and use one username and password for all 37signals applications, including multiple Basecamp accounts. See Lesson 16, "Integrating Basecamp with Add-ons and Other Applications," for more information about the Launchpad and Launchbar, which make accessing multiple accounts even easier.

NOTE: **Consider a Basecamp Free Account**

If you want to try out Basecamp without entering your credit card information, click the Free Plan link below the boxes describing Basecamp's paid plans.

3. If you already have a 37signals ID from another 37signals application or another Basecamp account, click the Sign In link. Otherwise, enter your first and last name, email address, company name, and time zone in the Create Your Basecamp Account section.

NOTE: **Signing Up for an Account Makes You the Account Owner**

The user you enter in this section becomes the account owner who manages your Basecamp account. This person should be the one responsible for authorizing credit card payments and choosing the appropriate Basecamp plan for your business. See Lesson 3, "Managing People, Companies, and Permissions," for more information about the account owner.

4. Enter a username and password. Be sure to choose a strong password, preferably one that contains both letters and numbers.

TIP: **Use an OpenID for Your Username**

If you have an OpenID, you can use this identifier as your Basecamp username. An OpenID is a username and password that lets you access multiple websites supporting OpenID, including AOL, Facebook, Google, Yahoo!, and Microsoft. Click the Use OpenID link to enter your ID or to learn more about OpenID.

5. Enter the URL of the Basecamp site address you want to use. For example, if your company name is Bon Appétit Catering, you might want to choose http://bonappetitcatering.basecamphq.com. Your site address can include only letters and numbers. Spaces aren't allowed. If you enter an address that's already taken, Basecamp prompts you to enter a new name.

TIP: **You Can Change Your Basecamp URL**

If your business needs change, you can change your Basecamp URL. See Lesson 15, "Managing Your Account," for more information.

6. Enter your credit card data in the Enter Your Billing Information section (if applicable). You can pay with a Visa, MasterCard, or American Express credit card. Remember that your card won't be billed until your 30-day trial ends. If you cancel your account before the 30 days, you won't be charged.

7. Enter any optional referrer or coupon/discount codes if you have one.

8. Review Basecamp's Terms of Service, Privacy Policy, and Refund Policy.

9. Click the Create My Account button to agree to these terms and create your account. Basecamp opens a dialog box that thanks you for signing up, shown in Figure 1.3. Basecamp also emails you a welcome greeting that includes your URL, username, and password.

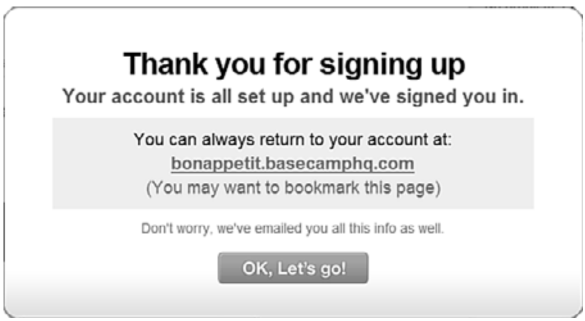

FIGURE 1.3 Log in to Basecamp from your own custom URL.

> TIP: **Bookmark Your Login Page**
>
> Remember to bookmark your login page and communicate it to all your project team members.

10. Click the OK, Let's Go! Button to log in to your Basecamp account, shown in Figure 1.4.

> TIP: **Take a Video Tour of Basecamp**
>
> For a quick video tour of Basecamp, click the Click Me to Start the Video link.

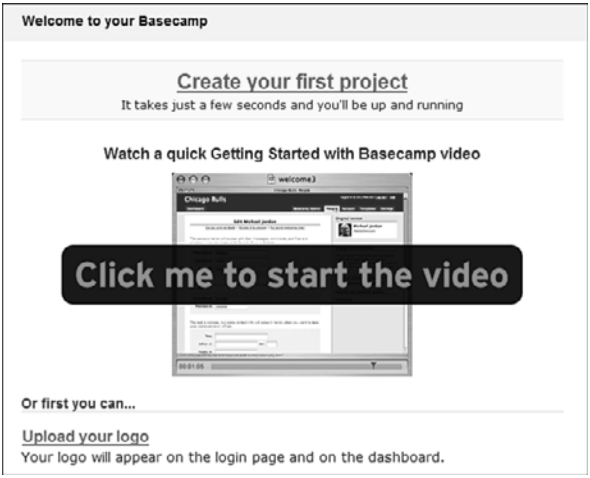

FIGURE 1.4 The Dashboard welcomes you to Basecamp.

The Basecamp Dashboard offers a welcome message and some suggestions for getting started. After you create your first project, this content is replaced with details about your project's to-do lists and milestones. Although the Dashboard includes a link to set up your first project, there are several other things you should do first, including customizing your workspace and entering your project team members.

Summary

In this first lesson, you learned about the many features Basecamp offers and how to sign up for an account. Next, it's time to customize your workspace.

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LESSON 2

Customizing Your Basecamp Workspace

In this lesson, you learn how to customize your Basecamp workspace by defining default settings and adding your own logo and color scheme.

> NOTE: **Not All Basecamp Users Can Customize the Workspace**
> Only the account owner and authorized administrators can make the customizations described in this lesson. The Settings tab isn't available to regular users.

Adding a Logo

To personalize your Basecamp workspace, consider adding an optional company logo. Your logo must be in GIF, JPG, or PNG format and no more than 300 pixels wide. Logos appear on the login screen, the Dashboard, and Overview pages.

To add a logo, follow these steps:

1. Click the Upload Your Logo link on the Basecamp Dashboard. The Settings page opens, shown in Figure 2.1.

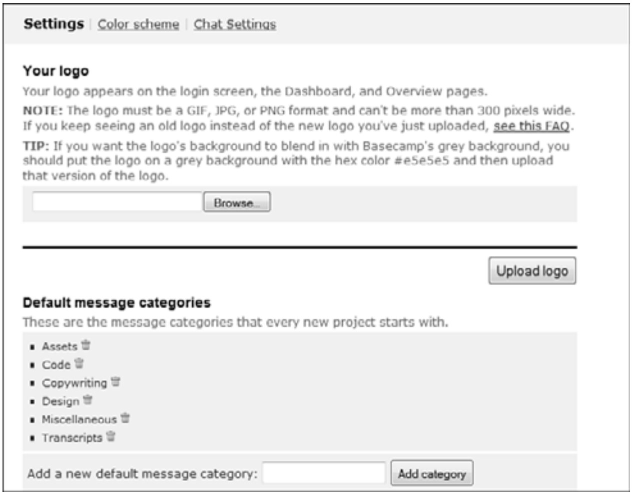


FIGURE 2.1 Upload your logo on the Settings page.

NOTE: **Where's the Upload Your Logo Link?**

The Upload Your Logo link appears on Basecamp's Dashboard only until you create your first project. If this link is no longer on your Dashboard, you can also click the Settings tab to open the Settings page where you can also upload a logo.

2. Click the Browse button and select the photo on your computer. Depending on your browser and operating system, this button could be named Choose File instead.
3. Click the Upload Logo button. The logo displays as a preview on the Settings page (see Figure 2.2).

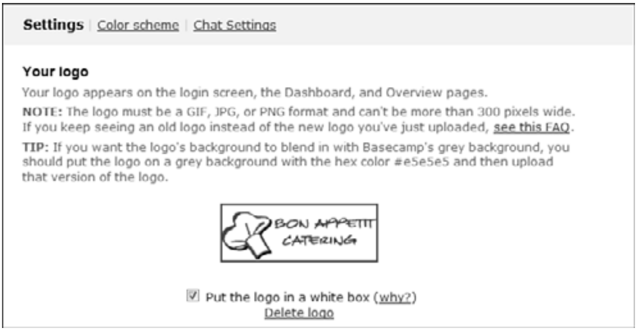


FIGURE 2.2 Displaying your company logo helps personalize your Basecamp workspace.

4. If you want to place your logo in a white box for better contrast against Basecamp's background, select the Put Logo in a White Box checkbox.

> TIP: **Blend Your Logo into Basecamp's Background**
>
> Instead of a white background, consider blending your logo into Basecamp's gray background. To do so, apply a gray background (with hex color #e5e5e5) to your logo in your graphics program, save as a GIF, and upload to Basecamp.

5. Click the Save Changes button at the bottom of the page. Your logo now appears on Basecamp.

To remove your logo from your Basecamp workspace, click the Delete Logo link. You can also replace your logo by uploading a new logo.

> TIP: **Resolving Logo Upload Problems**
>
> If you upload a new logo and your old logo still appears, force your browser to reload. On a PC, hold down the Alt key and click the Reload button. On a Mac, hold down the Option key and click the Reload button. If this doesn't work, clear your browser's cache.

Specifying Color Schemes

If Basecamp's default color scheme doesn't suit your needs, you can select another color scheme or create a custom color scheme. To do so, follow these steps:

1. Click the Change Colors link on Basecamp's Dashboard to open the Color Scheme page, shown in Figure 2.3.

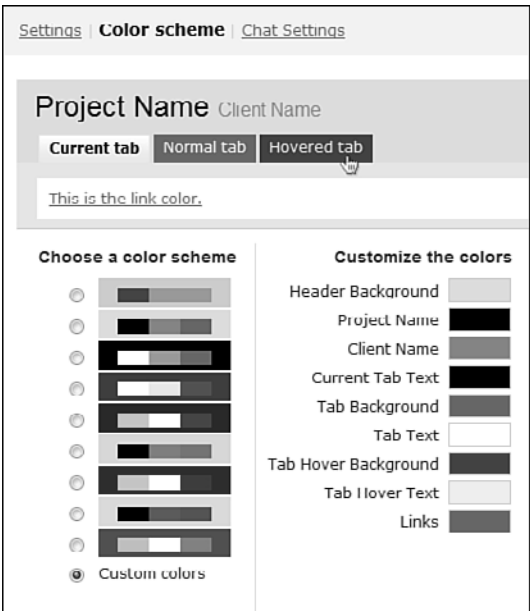


FIGURE 2.3 Customize the colors on your Basecamp workspace.

> NOTE: **Where's the Change Colors Link?**
>
> The Change Colors link appears on Basecamp's Dashboard only until you create your first project. If this link is no longer on your Dashboard, you can also click the Settings tab and then the Color Scheme link to open the Color Scheme page.

2. Select the option button next to the color scheme you prefer in the Choose a Color Scheme section. The page displays a preview of how the color scheme appears on the Basecamp workspace.
3. Click the Save These Colors button to apply the new color scheme.

If none of Basecamp's color schemes appeal to you or you want to apply a color scheme that matches your company's colors, you can create a custom color scheme. To do so, follow these steps:

1. Select the Custom Colors option button.
2. In the Customize the Colors section, click the box of the color you want to change. The color palette opens (see Figure 2.4).

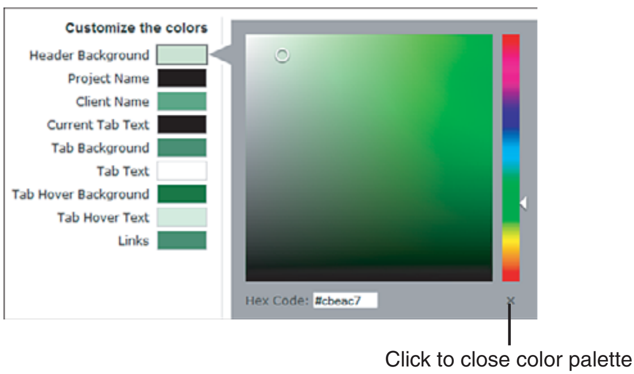


FIGURE 2.4 Use the color palette to create a custom Basecamp color scheme.

3. Select the color you prefer in the color palette or enter a specific color's hex code.

> PLAIN ENGLISH: **Hex Code**
>
> A **hex code** is a six-digit alphanumeric code used to identify a specific color on the web. It's prefaced by the # sign. In general, you would use this if you want your Basecamp color scheme to exactly match an existing color scheme, such as one you use on your company's website or logo.

4. Repeat steps 2 and 3 to modify the other colors you want to change.
5. Click the Close (x) button to close the palette.
6. Click the Save These Colors button to save your changes.

> TIP: **Create a Custom Color Scheme Quickly**
>
> If one of Basecamp's existing color schemes is close to what you want, select it and then begin modifying the colors you want to change. This is much faster than creating a color scheme totally from scratch.

Defining Default Settings

Before you start using Basecamp, you need to set up several default settings. You define these settings on the Settings page, below the Your Logo section. From the Basecamp Dashboard, click the Settings tab to open the Settings page.

On this page, you can define the following:

- Default message and file categories
- Your Basecamp site name
- Email notification preferences
- Encryption preferences

Defining Default Message Categories

Basecamp enables you to post and share messages with other project team members. Basecamp's default message categories might work well for some businesses, such as a web design business, but might not work at all for other businesses. Think carefully about the types of messages you plan to post and the best way to categorize them to suit the needs of your specific business. You can always modify these at any time, but it's a good idea to start with a plan that you feel is workable.

> TIP: **Create Message Subcategories**
>
> Basecamp doesn't officially support subcategories, but there's an easy workaround for creating your own subcategories. Simply include a colon or dash between your main category and subcategory. For example, instead of including all messages under Design, you could create the following categories: Design—Web, Design—Print, Design—Multimedia, and so forth.

To specify the default categories for these messages, follow these steps:

1. In the Default Message Categories section of the Settings page, review Basecamp's suggested default categories (see Figure 2.5). These include: Assets, Code, Copywriting, Design, Miscellaneous, and Transcripts.

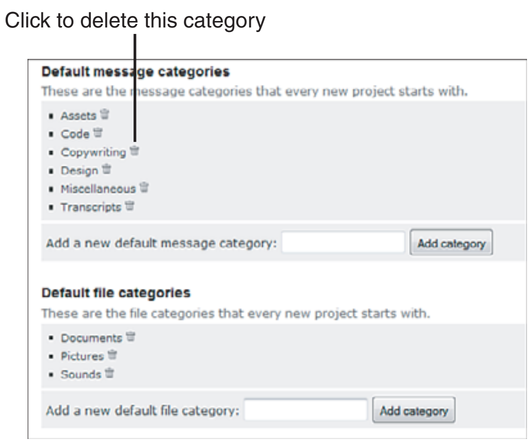


FIGURE 2.5 Review, delete, and add default categories to customize how you use Basecamp.

2. To delete a category, click the Trash icon to the right of its name and confirm that you want to delete.
3. To add a category, enter the new category's name in the Add a New Default Message Category text box and click the Add Category button. The category is added to the list.
4. Click the Save Changes button at the bottom of the Settings page.

You can also add a new message category on the Post a New Message page.

See Lesson 8, "Posting and Commenting on Messages," for more information about Basecamp's messaging features.

Defining Default File Categories

Basecamp provides three default categories for files that you upload to Basecamp: Documents, Pictures, and Sounds. To specify alternative default categories for your files, follow these steps:

1. In the Default File Categories section of the Settings page, review Basecamp's suggested default categories (see Figure 2.5).
2. To delete a category, click the Trash icon to the right of its name and confirm that you want to delete.
3. To add a category, enter the new category's name in the Add a New Default File Category text box and click the Add Category button. The category is added to the list. If you want to create subcategories, consider using colons or dashes as a way to further define your categories. For example, you could create subcategories for Picture such as Pictures—Logos and Pictures—Clip Art.
4. Click the Save Changes button at the bottom of the Settings page.

> NOTE: **Free Accounts Don't Include File Sharing**
>
> If you signed up for a free Basecamp account, your plan doesn't include file sharing.

See Lesson 9, "Sharing Files," for more information about Basecamp's file-sharing features.

Changing Your Basecamp Site Name

Basecamp displays your site name in the upper-left corner of every page. By default, this name is the company name you entered when you signed up. You can change this to another name, however.

To do so, enter your new site name in the text box in the Your Basecamp Site Name section on the Settings page. Click the Save Changes button at the bottom of the page for your new name to take effect.

Defining Email Notification Preferences

By default, you can send an email to the people you select as responsible for a particular to-do or milestone. You can also subscribe people on your project team to receive email notifications about messages, comments, or uploaded files (see Figure 2.6).

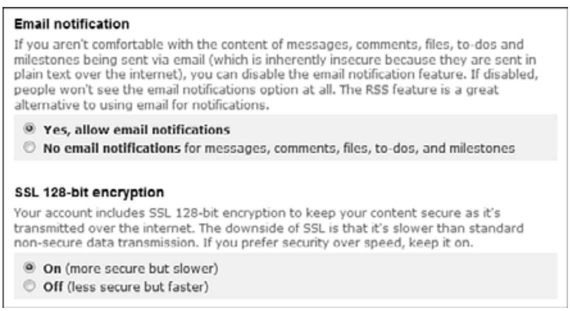


FIGURE 2.6 Send email notifications to your project team members.

If you prefer, you can disable the email notification feature and hide this functionality from Basecamp pages. For example, you might have concerns about sending confidential information over the Internet. An alternative to communicating via email is to use Basecamp's RSS feature. See Lesson 14, "Working with RSS Feeds," to learn more about this option.

You define your email notification preferences in the Email Notification section on the Settings page. The Yes, Allow Email Notifications option button is the default selection. To disable notifications, select the No Email Notifications option button and click the Save Changes button.

Defining Encryption Preferences

Basecamp offers advanced security through SSL 128-bit encryption. Encryption is turned on by default, but you can change this setting at any time in the SSL 128-bit Encryption section of the Settings page. Keeping it on increases security but slows your data transmission speed. Turning it off decreases security, but increases your transmission speed. Be sure to click the Save Changes button before leaving the Settings page.

Consider carefully the confidentiality and nature of your project data before making a decision about your encryption preferences.

> PLAIN ENGLISH: **SSL Encryption**
>
> **SSL** stands for Secure Socket Layer, a cryptographic protocol that offers security for data communications over the Internet. In other words, SSL encryption keeps your Basecamp data safe from security breaches. Ecommerce sites and banks also use SSL encryption to ensure the safety and privacy of their customers' credit cards and personal data.

Summary

In this lesson, you learned how to customize your Basecamp workspace and define default settings. Next, it's time to set up people and companies in your Basecamp system.

LESSON 3

Managing People, Companies, and Permissions

In this lesson, you learn how to manage people and companies in Basecamp, as well as assign permissions to your users.

Setting Up People and Companies in Basecamp

After signing up for Basecamp and customizing your workspace, you need to determine who on your project team needs access to Basecamp and what permissions you want to give to these people. Because Basecamp is based on collaboration and communication, it benefits you to include anyone who will do the following:

- Take responsibility for a to-do or milestone
- Have work hours to report on the project
- Manage or review project progress
- Handle administrative tasks associated with the project

In addition to adding people who work for your own company, you can also add other companies and their staff. For example, you should also add clients, vendors, partners, freelancers, and contractors.

A good approach for adding Basecamp users to your system is the following:

1. Update information about the account owner, such as title, phone numbers, and optional photo.
2. Add all Basecamp users who work for your company.
3. Specify any account administrators among your company users.
4. Add additional companies, such as clients and vendors.
5. Add Basecamp users who work for other companies.

In this lesson, you focus on adding people and companies on the All People tab. You can also manage these resources on the People & Permissions tab associated with a specific project. See Lesson 4, "Working with Projects," for more information.

Understanding Account Owner and Administrator Roles

Basecamp provides special permissions and access to two types of users: the account owner and account administrators.

The account owner is the person who signed up for Basecamp and is the only person who can do the following:

- Upgrade or downgrade your account
- View or change billing information such as credit card data or lump sum payments
- Cancel your account

Only one person can be the account owner; you can't share this role with multiple people.

> TIP: **Make Another User the Account Owner**
>
> You can transfer the role of account owner to another Basecamp user on the Settings page. See Lesson 15, "Managing Your Account," for more information about how to do this.

The account owner can designate one or more account administrators. These individuals can do the following:

- Create and modify projects
- Manage companies and people
- Edit the messages of other users
- Change project permissions and settings
- Change account settings

You can assign the account administrator role only to people associated with your primary company. You can't assign this role to someone who works for a company you add to your system, such as a client, vendor, or partner. See "Assigning Account Administrators" later in this lesson to learn how to assign account administrators.

Remember that only the account owner and account administrators can add, edit, and delete one or more companies and their associated people. Regular Basecamp users can edit only their own information by clicking the My Info link in the upper-right corner of the Basecamp page.

Managing People in Basecamp

Your success with Basecamp revolves around communicating and collaborating clearly with the people responsible for your project. To ensure this success, you need to add everyone involved in a project to your Basecamp system.

To start, from the Basecamp Dashboard, click the All People tab to view a list of every company and person in your system, shown in Figure 3.1.

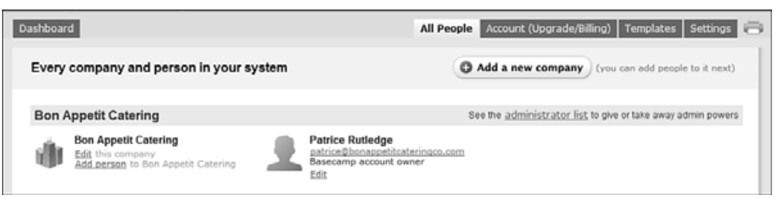


FIGURE 3.1 View the people and companies that comprise your Basecamp system.

If you're new to Basecamp, you should see only one company and one person, the account owner.

Adding a Person to Basecamp

In Basecamp, a person must be associated with a company. If the person you want to add doesn't work for the primary company you entered when you signed up, you must add that company first. See "Adding a Company to Basecamp" later in this lesson for more information.

To add a person to a company, follow these steps:

1. From the Basecamp Dashboard, click the All People tab.
2. Click the Add Person link below the company name. The Add a Person page opens, shown in Figure 3.2.

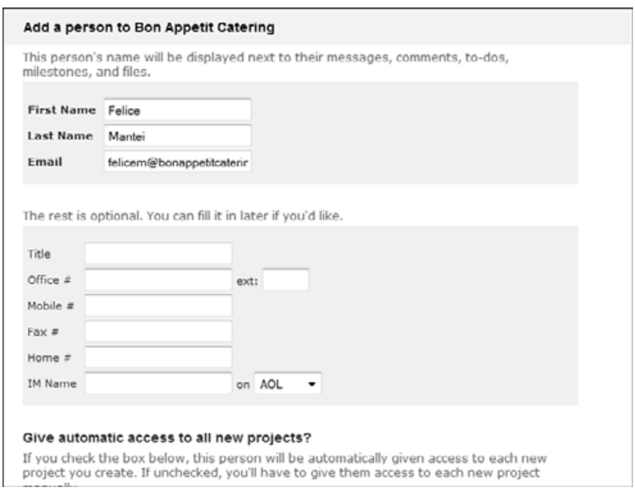


FIGURE 3.2 Add users to your Basecamp project team.

3. Enter the person's name and email address.
4. Optionally, add details about this person, including a title, phone numbers, and IM (instant message) username.

5. If you want to give this person access to all new projects you create, verify that the checkbox in the Give Automatic Access to All New Projects? section is selected (the default setting). This saves time over giving permission manually, but is worthwhile only if this person is going to be involved in more than one project. Keep in mind that this section is available only for people who work for your company, not for external companies.

> NOTE: **Defining Additional Permissions**
> You can specify the access rights of users from other companies in more detail on the People & Permissions tab associated with a specific project. See Lesson 4, "Working with Projects," for more information.

6. Optionally, add a personal note to add to the welcome email Basecamp sends to this person. You can preview this email on the right side of the screen.

7. Click the Add This Person button to add this person to Basecamp and return to the previous page.

Basecamp sends a welcome email to this person with a link to a web page where new users can complete their Basecamp account. Options including signing in using an existing 37signals ID (if they already use another 37signal application or have another Basecamp account), creating a new 37signals ID, or using an OpenID.

Editing Personal Information

As an account owner or administrator, you can easily update the information you store about your Basecamp users. For example, you can enter a new email address or phone number or transfer a person from one company to another (perhaps you hired a freelancer to work full-time for your company). You can't, however, change your users' usernames or passwords, or upload their photo. For privacy, they must perform these tasks on their own.

> NOTE: **Editing Your Own Personal Data**
>
> If you don't have account owner or account administrator rights, you won't have access to the All People tab. Instead, click the My Info link in the upper-right corner of the Basecamp page to open the Edit Your Personal Information page. On this page, you can edit your own personal data and upload a photo.

To edit the personal information of an existing Basecamp user, follow these steps:

1. From the Basecamp Dashboard, click the All People tab to list all people and companies in your system.
2. Click the Edit link below the name of the person whose information you want to edit. Basecamp opens the Edit [Person's Name] page. This page is nearly identical to the Add a Person page.

> TIP: **Resend a Welcome Email**
>
> If one of your Basecamp users never received a welcome email or needs a new one, click the Re-send the Email Invitation link to resend this message. This is particularly important if you change information required to log in.

3. Update the data you want to change, such as email address, company name, or phone number.
4. Click the Save Changes button.

Adding User Photos

Optionally, all users can upload a photo to personalize your Basecamp system. Photos appear next to a user's Basecamp activity, such as comments. Account owners and administrators can't add photos; users must upload and manage their own photos. Photos must be in a GIF, JPG, or PNG format and will be resized to 48 pixels square. If you use a 37signals ID to access more than one application or account, this photo appears with those accounts as well.

To add a user photo, follow these steps:

1. From the Basecamp Dashboard, click the My Info link.
2. Click the Edit Your Personal Information link. Basecamp opens the Update Your 37signals ID page.
3. Click the Browse button and select the photo on your computer. Depending on your browser and operating system, this button could be named Choose File instead.
4. Click the Save Changes button. The photo displays as a preview on the page (see Figure 3.3) and appears next to your name on Basecamp.

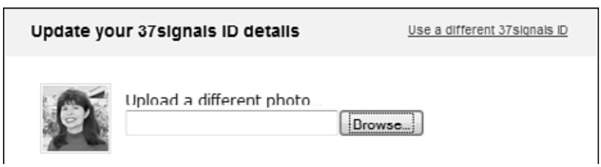


FIGURE 3.3 Preview the way a user's photo will appear on Basecamp.

To replace an existing photo, upload a new one.

> TIP: **Resolving Photo Upload Problems**
>
> If you upload a new photo and your old photo still appears, force your browser to reload. On a PC, hold down the Alt key and click the Reload button. On a Mac, hold down the Option key and click the Reload button. If this doesn't work, clear your browser's cache.

Deleting a Person

When you delete people from Basecamp, you remove them permanently from your Basecamp system. They can no longer view, enter, or modify any data, nor can they log in to your Basecamp account. Their prior activity on your projects, however, remains in Basecamp for you to view.

> NOTE: **Removing a Person from a Project**
>
> Instead of deleting people, you should also consider simply removing them from a project. In this case, they can no longer access the project you removed them from, but they can access other projects now or in the future. They can also participate in future projects you manage on Basecamp without setting them up again in your system. See Lesson 4, “Working with Projects,” for more information about removing people from projects.

To delete a person from your Basecamp system, follow these steps:

1. From the Basecamp Dashboard, click the All People tab to list all people and companies in your system.
2. Click the Edit link below the name of the person you want to delete.
3. Click the Delete [First Name] Now link. Basecamp displays a warning message confirming that you want to delete this person.
4. Click the Yes button. Depending on your browser and operating system, this button could be called OK. Basecamp permanently removes the person.

Managing Companies in Basecamp

Your Basecamp system needs at least one company (the primary company you entered when you signed up), but you can add other companies such as clients, partners, vendors, or agencies.

Adding a Company to Basecamp

To add a new company, follow these steps:

1. From the Basecamp Dashboard, click the All People tab. Basecamp displays all companies and people currently in your system.
2. Click the Add a New Company button. The page expands to display the Add a New Company section, shown in Figure 3.4.

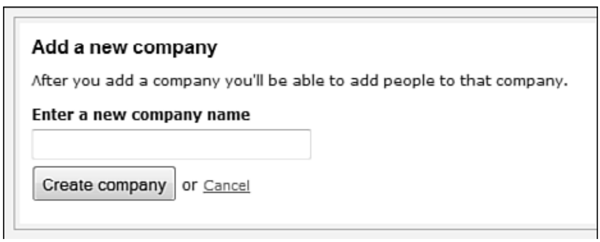


FIGURE 3.4 Add all the companies that are involved in your project.

3. Enter the company name in the text box.
4. Click the Create Company button. Basecamp now displays this company in its list of all companies and people.

Next, you can do the following:

- Add more details about this company
- Upload an optional company logo
- Add people to this company

Editing Company Information

You can enter additional information about the companies you add to Basecamp and modify this data whenever necessary. To do so, follow these steps:

1. From the Basecamp Dashboard, click the All People tab.
2. Click the Edit link below the name of the company whose information you want to edit. Basecamp opens the Edit [Company Name] page, shown in Figure 3.5.

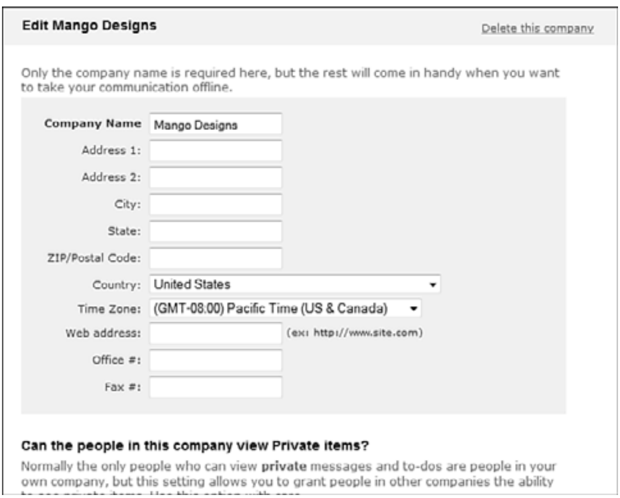


FIGURE 3.5 Specify a company's basic information and permissions.

3. Enter or modify any company data, such as the company's address, phone numbers, or website. Company Name is the only required field in this section, but completing the remaining fields provides a more detailed record of the companies that are participating in this project.
4. If you want to give users at the company the right to view private messages, select the checkbox in the Can the People in This Company View Private Items? section. This section doesn't appear if you're editing your primary company's data.

> CAUTION: **Consider Carefully Who Can View Private Messages**
>
> In general, you'll want to allow only people in your own company to view private messages. But if there's a specific reason you want to open this up to external companies, you can do so in this section. See Lesson 8, "Posting and Commenting on Messages," for more information about private messages.

5. Click the Save Changes button.

Adding a Company Logo

Optionally, you can upload a company's logo to personalize your Basecamp workspace. Logos must be in GIF, JPG, or PNG format and no more than 300 pixels wide. Logos appear on the login screen, the Dashboard, and Overview pages.

> NOTE: **Adding a Logo for Your Primary Company**
>
> To add or modify the logo for your primary company (the one you set up when you signed up for Basecamp), click the Settings tab from the Basecamp Dashboard. See Lesson 2, "Customizing Your Basecamp Workspace," for more information about your primary company's logo.

To add a company logo, follow these steps:

1. From the Basecamp Dashboard, click the All People tab.
2. Click the Edit link below the name of the company whose photo you want to upload. Basecamp opens the Edit [Company Name] page.
3. Scroll down to the Company Logo section at the bottom of the page.
4. Click the Browse button and select the photo on your computer. Depending on your browser and operating system, this button could be named Choose File instead.

5. Click the Upload Logo button. The logo displays as a preview on the page, shown in Figure 3.6.

FIGURE 3.6 Preview the way a company's logo will appear on Basecamp.

6. If you want to place the logo in a white box for better contrast against Basecamp's background, select the Put the Logo in a White Box checkbox.

7. Click the Save Changes button near the bottom of the page.

To remove the logo from your Basecamp workspace, click the Delete Logo link. You can also replace the logo by uploading a new logo.

> TIP: **Resolving Logo Upload Problems**
>
> If you upload a new logo and your old logo still appears, force your browser to reload. On a PC, hold down the Alt key and click the Reload button. On a Mac, hold down the Option key and click the Reload button. If this doesn't work, clear your browser's cache.

Deleting a Company

You can delete any company you add to Basecamp, but you can't delete the company of the account holder. In other words, you need at least one company in your Basecamp system.

> CAUTION: **Consider Carefully Whether to Delete a Company**
>
> Although it's easy to delete a company in Basecamp, you should first consider whether this is a wise move. You can't undo a company deletion. Deleting is best for situations where you added a company whose people never actually performed any work on the project.

To delete a company from your Basecamp system, follow these steps:

1. From the Basecamp Dashboard, click the All People tab.
2. Click the Edit link below the name of the company you want to delete.
3. Click the Delete This Company link. Basecamp displays a warning message confirming that you want to delete the company and its associated people.

> NOTE: **Where's the Delete This Company Link?**
>
> If a company is still associated with a project, you can't delete it and the Delete This Company link isn't available. You must remove a company from all projects before deleting it. See Lesson 4, "Working with Projects," for more information about how to do this.

4. Click the Yes, Delete This Company link. Depending on your browser and operating system, the text on this button could differ. Basecamp permanently removes the company.

> TIP: **Consider Editing Rather than Deleting a Company**
>
> If you made a mistake in setting up a company, you don't have to delete it and start over. Just click the Edit link and change any company data, including the company name.

Assigning Account Administrators

To assign administrator rights to one or more people, follow these steps:

1. From the Basecamp Dashboard, click the All People tab.
2. Click the Administrator List link to open the Set Administrators page, shown in Figure 3.7.

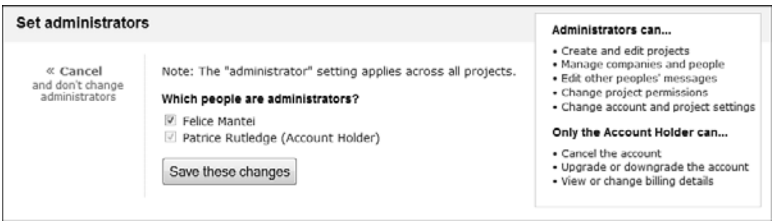


FIGURE 3.7 Give other users at your company the right to manage and edit your Basecamp data.

3. Place a checkmark before the names of anyone you want to assign the role of account administrator.

> NOTE: **Why Are People Missing from the List?**
>
> Remember, you can assign this role only to people who work for your company. The names of other people in your Basecamp system won't appear in this list. Also, you can't remove this role from the account owner. This person holds account administrator rights by default.

4. Click the Save These Changes button.

Summary

In this lesson, you learned how to manage people, companies, and permissions in Basecamp. Now it's time to create your first project.

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.

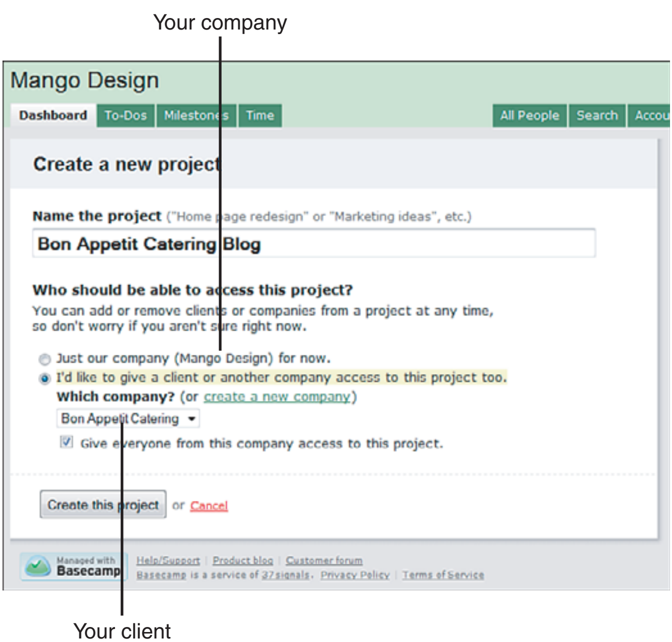


FIGURE 4.1 Create your first Basecamp project in minutes.

> 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.

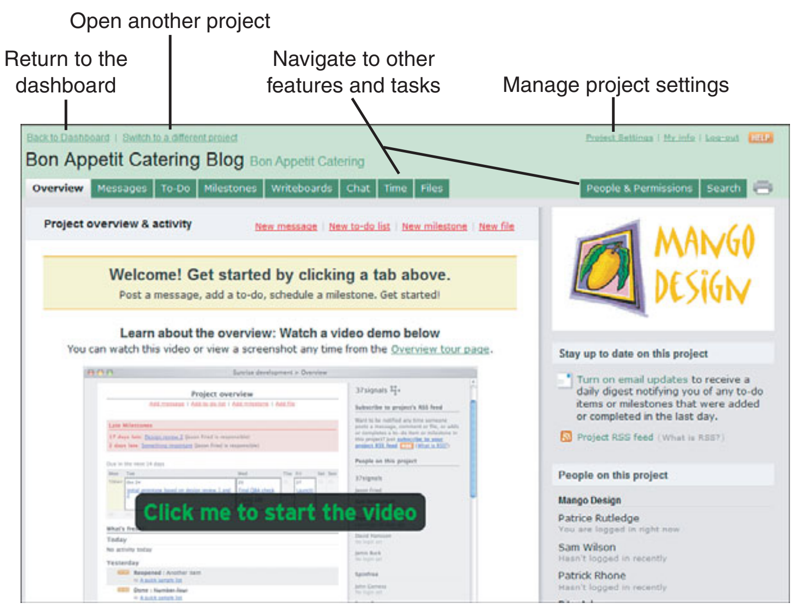


FIGURE 4.2 The Overview page is “command central” for each Basecamp project.

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.

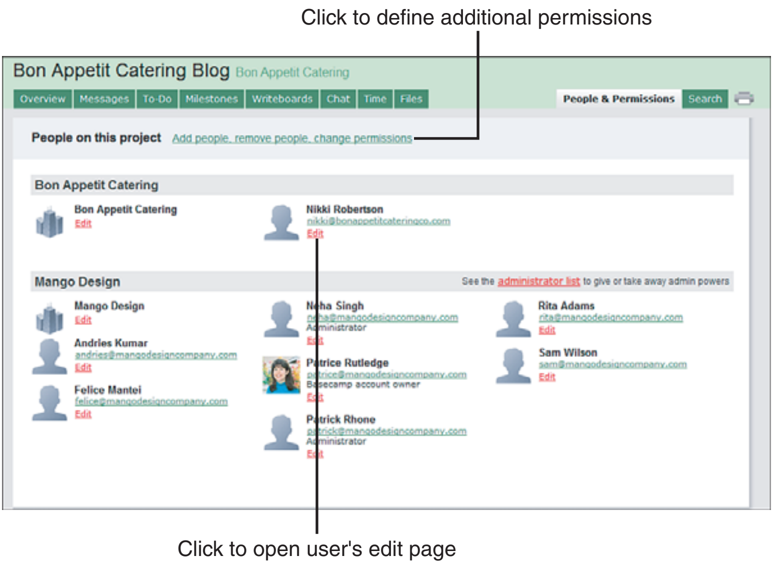


FIGURE 4.3 The People & Permissions page is very similar to the All People page you explored in Lesson 3.

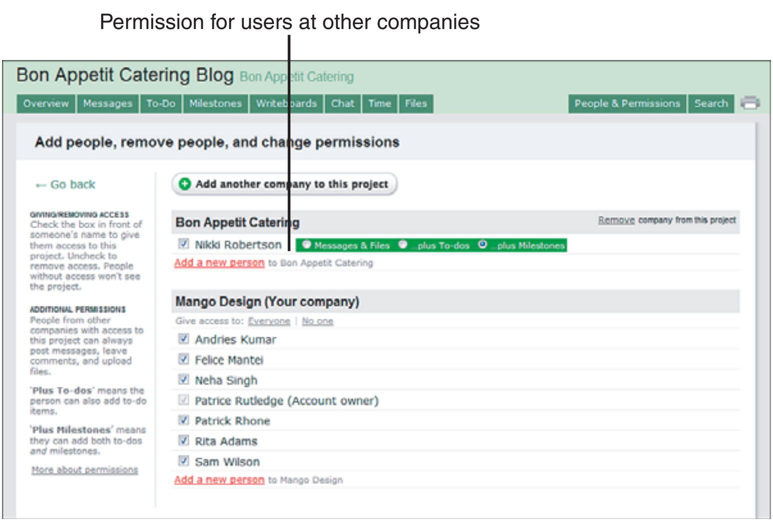


FIGURE 4.4 Specify project-specific permissions on this page.

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.

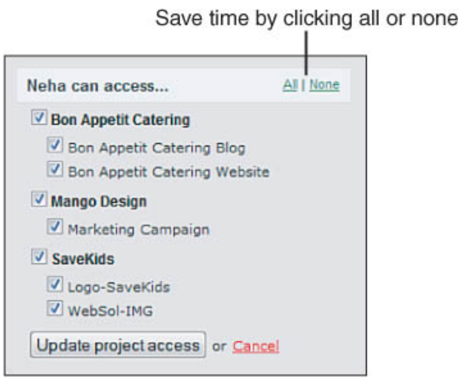


FIGURE 4.6 Give an individual user access to specific projects.

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.

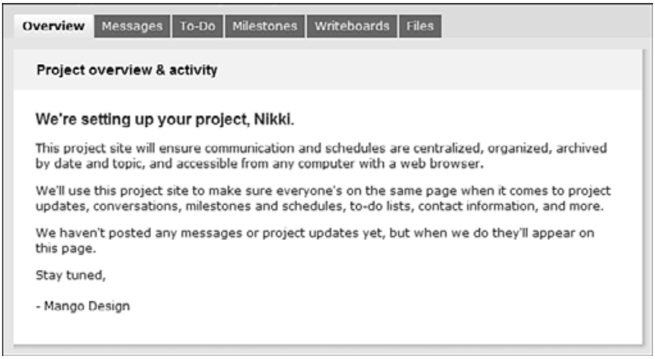


FIGURE 4.7 The initial Overview page for a regular user differs from what the account owner or administrator sees.

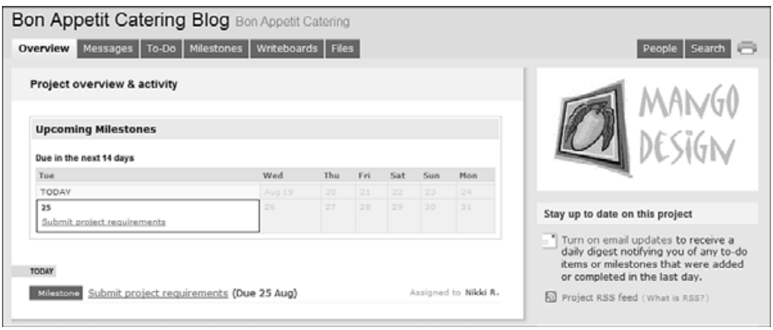


FIGURE 4.8 Project users have access only to the features you give them permission to view.

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.

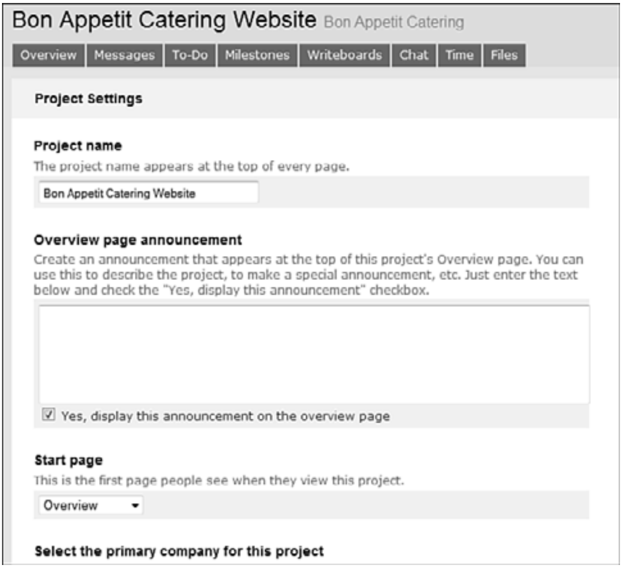


FIGURE 4.9 Update project settings before you start entering project data.

> 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.

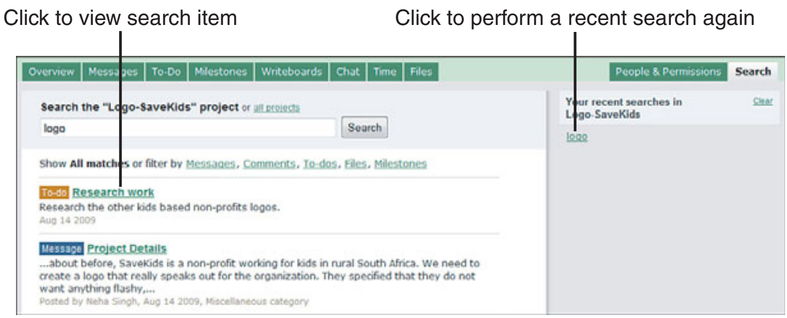


FIGURE 4.11 Search large projects for the exact information you need.

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.

LESSON 5

Entering and Tracking Milestones

In this lesson, you learn how to enter and track project milestones in Basecamp.

Setting Realistic Milestones

Establishing realistic project milestones is one of the key components of successful project management. In Basecamp, you can add, modify, comment on, and track milestones, as well as create to-do lists that you associate with these milestones.

PLAIN ENGLISH: **Milestone**

A **milestone** marks a significant event in your project, targeted for a specific date. Sample milestones include the end of a phase, the completion of a project deliverable, or an important meeting.

Although Basecamp makes adding milestones a simple task, you have a better chance of successfully completing these milestones on time with a little upfront analysis.

TIP: **Integrate Milestones and To-Do Lists**

Creating milestones and to-do lists for your projects are part of your overall planning process, not two separate steps. It's recommended that you review both Lessons 5 and 6, create your plan, and then enter milestones and to-do lists in Basecamp.

If you've used other project management systems in the past, it's not difficult to map your milestones to Basecamp. But if formal project management is new to you, you need to think carefully about the critical milestones that you need to track. There is no one right or wrong way to set milestones in Basecamp. That said, here are a few tips to help you establish realistic and achievable milestones:

- Consider any concrete dates or deadlines that you must meet. For example, if you're planning an event, you absolutely must finish by the date of that event. If you're managing a design project, there might be a little more leeway about the final deadline, but you could have design reviews with your client on specific dates.
- Consider creating milestones for other important events, phases, tasks, or deliverables in your project. Alternatively, you could create milestones by date if you plan to manage tasks on a week-by-week basis. In this scenario, your milestone could be the end of a specific week, and the to-do list you associate with it could list all tasks scheduled for that week.
- Allow yourself enough time for worst-case scenarios. Don't make your milestone dates so close that the only way to achieve them is under perfect conditions.
- Think about how your to-do lists will map to the milestones you create. Planning milestones and to-do lists together creates a more realistic project schedule.
- List your milestones and to-dos, analyze them, and make any revisions before entering into Basecamp. If you plan to collaborate with others on this, consider using the Basecamp writeboard for your initial analysis. See Lesson 11, "Collaborating with Writeboards," for more information.

TIP: **Expand on Basecamp's Milestone Functionality with Add-ons**

The numerous third-party add-ons that integrate with Basecamp enable you to create complex charts and graphs based on your milestones and much more. See Lesson 16, "Integrating Basecamp with Add-ons and Other Applications," for more information.

Understanding Milestone Permissions

Access to Basecamp's milestone features vary depending on the user's role in the system (account owner, administrator, internal user, or external user).

Basecamp users from external companies who are assigned to a project can do the following:

- View milestones on the Basecamp Dashboard and the project Overview and Milestones pages.
- Mark as complete milestones assigned to them.
- Comment on milestones. They can edit their own comments within 15 minutes of posting, but they can't delete comments.
- Add milestones, if the account owner or an administrator assigns permission on the Add People, Remove People, and Change Permissions page. They can also edit and delete the milestones they add. See Lesson 3, "Managing People, Companies, and Permissions," for more information.

Basecamp users at your company have full access to milestone functionality, except for the ability to delete comments or assign permissions.

Account owners and administrators have full access to all milestone features.

Adding Milestones

To add your first milestone for a project, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the Milestones tab to open the Milestones page, shown in Figure 5.1.

FIGURE 5.1 Basecamp offers assistance when you create your first milestone.

3. Optionally, view the video demo to take a visual tour of Basecamp's milestone feature.
4. Click the Create the First Milestone for This Project link. The Add a New Milestone page opens, shown in Figure 5.2.

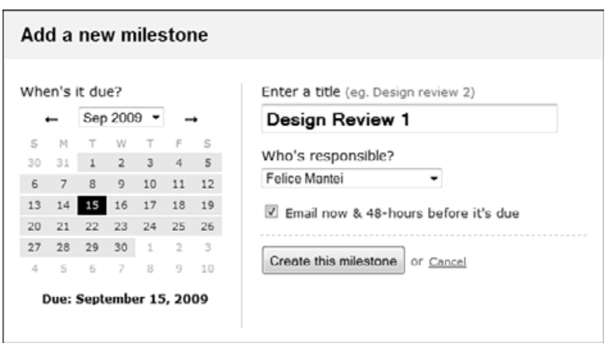


FIGURE 5.2 Select a target date for your milestone.

NOTE: **Where's the Create the First Milestone for This Project Link?**

The Create the First Milestone for This Project link appears on the Milestones page only until you create your first milestone. After that, the initial content that appears on the page is replaced with details about actual milestones. Alternatively, you can also create a milestone by clicking the Add a New Milestone button on the Milestones page or the New Milestone link on the Overview page.

5. Enter a milestone title in the Enter a Title text box.
6. Select the person responsible from the drop-down list. Your name appears by default, but you can also choose another user from your company or from an external company that you've given permission to view this project.
7. The Email Now & 48 Hours Before It's Due checkbox is selected by default, which sends the party responsible an email notification 48 hours before the milestone due date. If you don't want to send this email, remove the checkmark.
8. Select the date the milestone is due from the calendar. You can select a month in the future from the drop-down list or use the left and right arrows to navigate the calendar.
9. Click the Create This Milestone button to create the milestone.

Basecamp returns to the Milestones page, which now displays a calendar with the milestone you just created. See "Viewing Milestones" later in this lesson for more information.

TIP: **Track Milestone Activity with the iCalendar Feed**

If you want to track your milestones on an external calendar, click the Subscribe to iCalendar link on the Milestones page to integrate your project's iCalendar feed with your own calendar system. See Lesson 7, "Working with iCalendar," for more information.

Adding Multiple Milestones

If you have a lot of milestones to create, you can save time by entering ten milestones on the same page. To do so, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the Milestones tab to open the Milestones page.
3. Click the Add Ten at a Time link on the right side of the page. Figure 5.3 shows the Add Up to 10 New Milestones page, which opens.

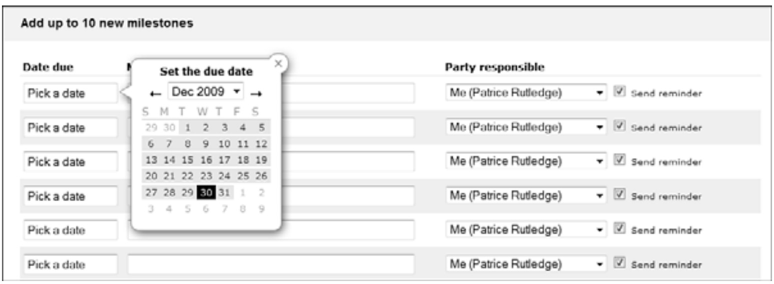


FIGURE 5.3 Save time by adding multiple milestones on the same page.

4. Click in the Due Date field and select a date from the calendar that appears.
5. Enter an appropriate Milestone Title. If you don't enter a title, Basecamp won't save your milestone.
6. Select the Party Responsible from the drop-down list. Your name appears by default, but you can also choose another user from your company or from an external company that you've given permission to view this project.
7. The Send Reminder checkbox is selected by default, which sends the party responsible an email notification 48 hours before the milestone due date. If you don't want to send this email, remove the checkmark.

8. Repeat steps 4 through 7 for any additional milestones you want to create.

9. Click the Create These Milestones button to create the milestones and return to the Milestones page.

Editing Milestones

After you add a milestone, you might need to change it. For example, you could change the due date, reassign the milestone to another person, or modify email notification settings. You can edit upcoming, late, and completed milestones.

To do so, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.

> TIP: **Edit a Milestone from the Dashboard**
>
> You can also edit a milestone from the Basecamp Dashboard if it appears in the Late & Upcoming Milestones section. Click the milestone link, mouse over the milestone title in the box that appears, and click the Edit link.

2. Click the Milestones tab to open the Milestones page.

3. Mouse over the milestone you want to edit. The Edit link appears to the left of the milestone title (see Figure 5.4).

FIGURE 5.4 Mouse over a milestone to display the Edit link.

4. Click the Edit link to expand the page (see Figure 5.5).

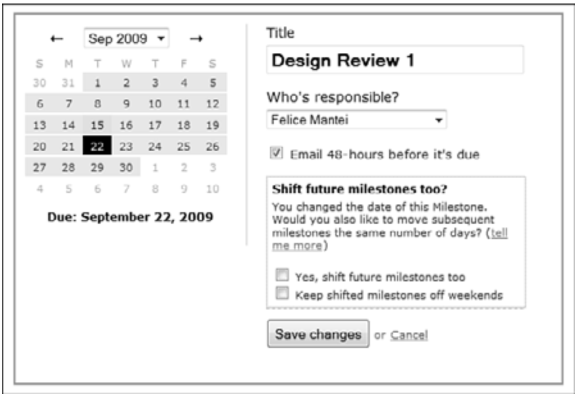


FIGURE 5.5 Quickly make changes to your milestones.

5. In the box that appears, make any desired changes. For example, you can change the milestone title, select another person to be responsible for the milestone, change the date, or change the email notification status.

6. If you change the milestone date, the Shift Future Milestones Too? box appears. You can choose to shift future milestones as well as keep shifted milestones off weekends, if desired.

> NOTE: **Deciding Whether to Shift Milestones**
>
> If your project has numerous milestones, the ability to shift future milestones can be a big time saver. This feature is most useful if your milestones have dependencies. In other words, completing milestone B is dependent on completing milestone A. If your milestones are self-contained and independent of each other, shifting future milestones might not be necessary.

7. Click the Save Changes button.

Basecamp updates the Milestones page with your changes.

Commenting on Milestones

If you want to communicate with other team members about a particular milestone, you can leave a comment. For example, you might want to remind others about important information relating to this milestone, post an alert about milestone roadblocks, and so forth. You can format comment text and attach files, similar to message comments.

To comment on a milestone, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the Milestones tab to open the Milestones page.
3. Mouse over the milestone you want to comment on. The Comment icon appears to the right of the milestone title (refer to Figure 5.4).
4. Click the Comment icon to open the Comments on This Milestone page, shown in Figure 5.6.

FIGURE 5.6 Add comments and attach related files.

5. Enter your comments in the Leave a Comment text box.

> NOTE: **Comment Formatting Options**
>
> You can enter comments as plain text or format your text using HTML or textile codes. See the section "Formatting Message and Comment Text" in Lesson 8, "Posting and Commenting on Messages," for more information.

6. To attach one or more files, click the Attach Files to This Comment link. Click the Browse button and select the files on your computer. Depending on your operating system, you might see the Choose Files button instead. Attaching a file is particularly useful if you want project team members to comment on it. Each file must be less than 100MB and counts toward the file storage limit of your Basecamp account plan.

> TIP: **Try the Basic Uploader if You Have Trouble Uploading Files**
>
> Basecamp uses the Advanced Uploader by default, which enables you to upload multiple files. The Advanced Uploader requires that you have Flash 9 or greater installed on your computer and that you haven't installed an ad-blocking plug-in on your browser. If you're having trouble uploading, click the Basic Uploader link, which enables you to upload files one at a time. See Lesson 9, "Sharing Files," for more information about file sharing and storage.

7. Select the team members you want to send email notifications to in the Subscribe People to Receive Email Notifications section. You can notify individuals assigned to this project, both at your company as well as any external company. To save time, you can also choose to notify all people at a company. The people you select will receive email notification when you post your comment and when any related comments are posted.

8. Click the Preview button to preview your comment.

9. If you need to make changes to your comment, click the Edit button to return to the previous page.

10. Click the Add This Comment button to post your comment.

The Milestones page indicates that this milestone has a comment and lists the number of comments. See “Viewing Milestones” later in this lesson for more information.

Editing Milestone Comments

If you discover a mistake in your comment text or decide to change your comment, you can edit it.

> CAUTION: **There Is a Time Limit for Editing Comments**
>
> You can only edit comments for up to 15 minutes after posting. After that, your only option is for an account owner or administrator to delete the comment. See “Deleting Milestone Comments,” later in this section.

To edit a comment, click the Comment icon on the Milestones page and click the Edit link next to the comment. Basecamp lets you know how many minutes are left. Figure 5.7 shows a sample comment that can still be edited.

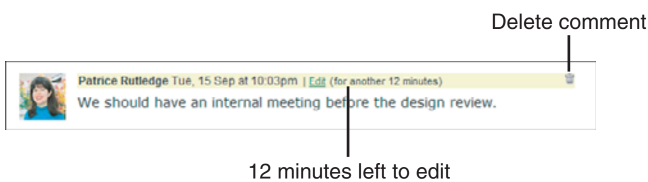


FIGURE 5.7 Basecamp tells you how much longer you can edit a comment.

If time has elapsed on your comment, the Edit link is no longer available.

Deleting Milestone Comments

The account owner and administrators can delete comments posted by all members of their project teams, including themselves. Basecamp users can’t delete comments.

To delete a comment, click the Comment icon on the Milestones page and then click the Trash icon next to the comment you want to delete (refer to Figure 5.7). Basecamp asks you to confirm the deletion.

Completing Milestones

When you complete the work required to meet a milestone, you need to mark the milestone as complete in your Basecamp system. To do so, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the Milestones tab to open the Milestones page (see Figure 5.8).

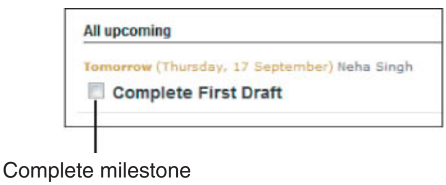


FIGURE 5.8 A good project management system requires the accurate reporting of completed milestones.

3. Select the checkbox before the milestone you've completed.

Basecamp marks the milestone complete as of the current date and moves it to the Completed section. The Overview page and the Basecamp Dashboard also show the milestone as completed, with a strikethrough over the milestone title.

> TIP: **Mark Milestones as Complete on the Dashboard**
>
> You can also complete a milestone if it appears on the Basecamp Dashboard in the Late & Upcoming Milestones section. Click a milestone link in this section, select the checkbox, and click the OK button. See "Viewing Milestones" later in this lesson for more information.

Viewing Milestones

Basecamp lets you view and update milestone progress in several places. The milestone data you can view and the tasks you can perform depend on where you are in the Basecamp system. In this section, you learn about the options for viewing milestones in Basecamp.

Viewing Milestones on a Project's Milestones Page

A project's Milestones page is the primary location for viewing and managing milestone activity. Figure 5.9 shows a sample Milestones page of an in-progress project.

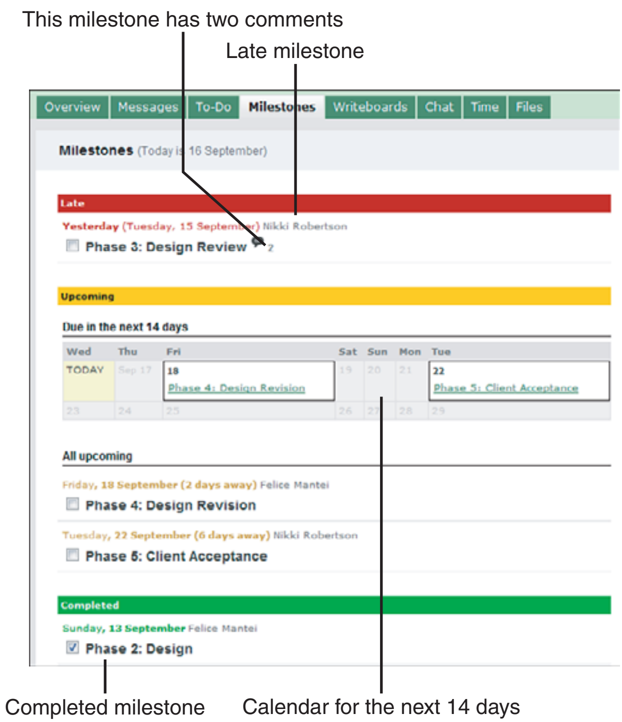


FIGURE 5.9 The Milestones page for a specific project offers detailed data on upcoming, late, and completed milestones.

The Milestones page lists milestones by status and date. Late projects are highlighted in red, upcoming projects in yellow, and completed projects in green. If a project has existing comments, the Comment icon appears to the right of the milestone title with the number of comments. The Completion checkbox, to the left of the milestone title, is unchecked if the milestone hasn't been completed yet. If it's been completed, there is a checkmark in this box.

Mouse over the milestone title to display the Trash icon, Edit button, and Comment icon.

Viewing Milestones on a Project's Overview Page

The Overview page for a specific project lists late milestones as well as other milestones by date. Figure 5.10 shows an example of this page.

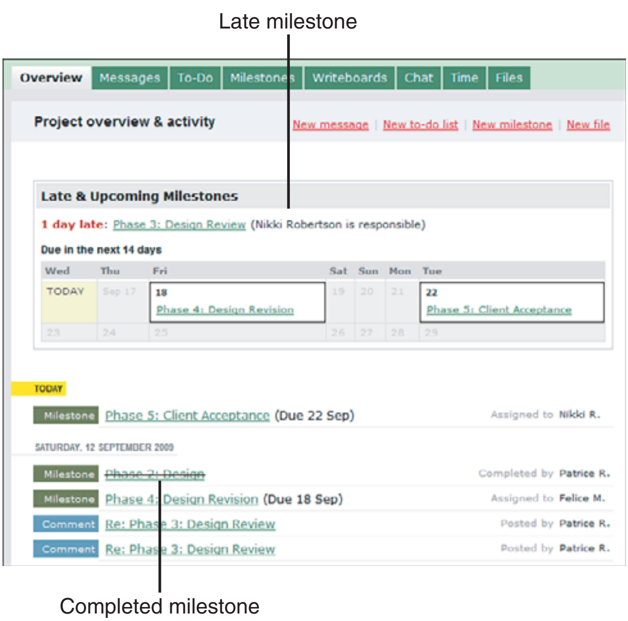


FIGURE 5.10 Get a quick overview of your project, including milestone data.

Click the milestone link to open a specific milestone. A strikethrough over the milestone title indicates a completed milestone.

Viewing Milestones on the Basecamp Dashboard

The Basecamp Dashboard provides an overview of Late & Upcoming Milestones across all projects as well as recent milestones by project, as shown in Figure 5.11.

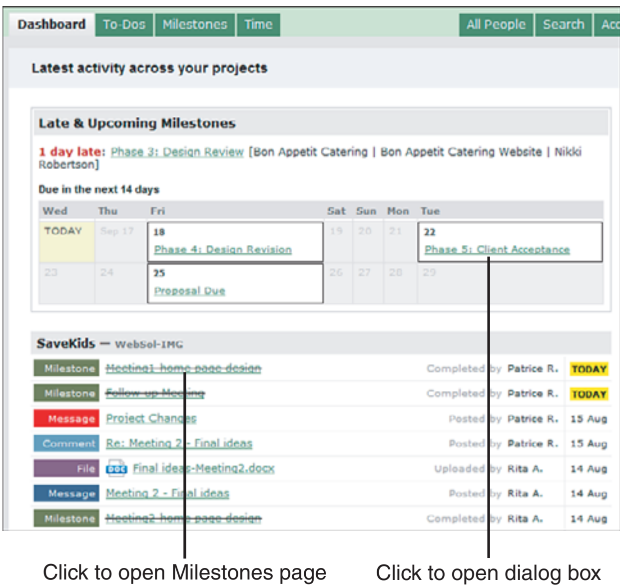


FIGURE 5.11 You can also update milestones from the Dashboard.

In the Late & Upcoming Milestones section, you can click a milestone link to open a dialog box that displays milestones details (see Figure 5.12)

FIGURE 5.12 Update milestones in this dialog box.

Mouse over the milestone title to display the Trash icon, Edit button, and Comment icon.

Clicking the milestone links in the area below the Late & Upcoming Milestones section takes you to the Milestones page. You must click a link in the Late & Upcoming Milestones section to open the box where you can update milestone data.

See Lesson 13, “Viewing Project Activity on the Dashboard,” for more information.

Viewing Milestones on the Dashboard Milestones Page

From the Dashboard, you can click the Milestones tab to view a calendar that shows the milestones for all your Basecamp projects for the next three months. Note that people at external companies can’t view this page, only people at your company.

Figure 5.13 shows this calendar view.

Late milestones appear at the top of the page in red. You can also view milestones assigned to a specific person by selecting a name from the Show Milestones Assigned To drop-down list.

Click a milestone link on this page to move to the associated project’s Milestones page.

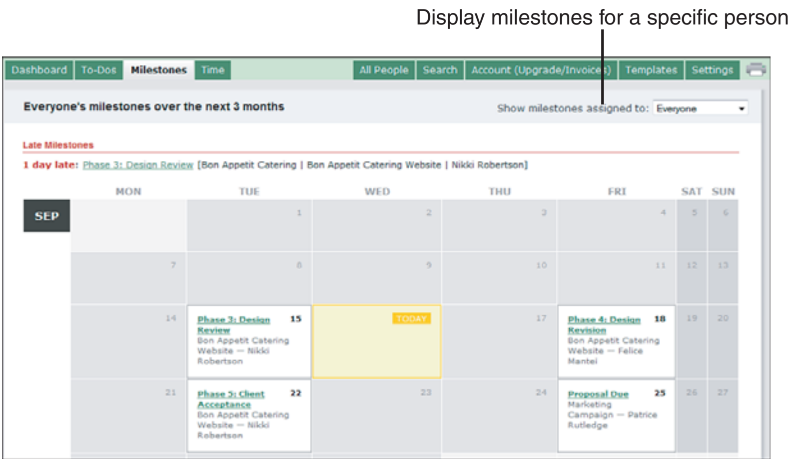


FIGURE 5.13 View a calendar of your milestones for the next three months.

> NOTE: **There Are Two Milestones Pages in Basecamp**
>
> Even though their names are identical, the Milestones page you reach from the Dashboard and the Milestones page associated with each project serve a different purpose. The Dashboard Milestones page provides a calendar view of everyone's milestones across projects, whereas the Milestones page for a specific project focuses on milestone details for that project only.

Deleting Milestones

If you make a mistake when entering milestones or decide that you don't need a milestone for any reason, you can delete it. You can delete upcoming, late, and completed milestones.

To do so, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.

TIP: **Delete a Milestone from the Dashboard**

You can also delete a milestone from the Basecamp Dashboard if it appears in the Late & Upcoming Milestones section. Click the milestone link, mouse over the milestone title in the box that appears, and click the Trash icon.

2. Click the Milestones tab to open the Milestones page.
3. Mouse over the milestone you want to edit. The Trash icon appears to the left of the milestone title (see Figure 5.14).

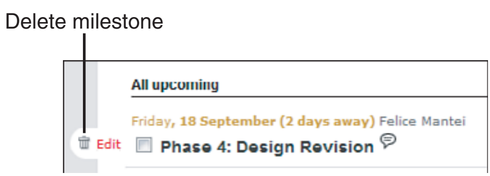


FIGURE 5.14 Click the Trash icon to delete a milestone.

4. Click the Trash icon to delete the milestone. Basecamp opens a dialog box, asking you to confirm this permanent deletion. You can't undo a deletion.
5. Click the OK button to confirm.

Basecamp removes the milestone from the Milestones page and your Basecamp system.

CAUTION: **You Can't Undo a Deletion**

Be sure that you really want to delete a milestone before doing so. Basecamp deletions are permanent, and there is no undo.

Summary

In this lesson, you learned how to add, modify, and track project milestones. Next, learn how to add to-do lists for your project tasks.

LESSON 6

Entering and Tracking To-Dos

In this lesson, you learn how to enter and track project to-do lists and to-do items in Basecamp.

Understanding To-Do Lists

In addition to creating realistic and achievable milestones, you need to define clear and specific to-dos for your project to succeed.

> PLAIN ENGLISH: **To-Do**
>
> A **to-do** is the Basecamp term for work to be performed. In other project management systems, this is often called a task. Basecamp to-do lists are similar to summary tasks, which include multiple related subtasks, referred to as to-do items in Basecamp.

Before you start entering to-dos in Basecamp, you should create a draft of your master to-do list somewhere you can easily edit its content. The Basecamp writeboard is a great place to do this because you can collaborate with other team members on your list. See Lesson 11, "Collaborating with Writeboards," for more information.

> TIP: **Integrate Milestones and To-Do Lists**
>
> Creating milestones and to-do lists for your projects are part of your overall planning process, not two separate steps. It's recommended that you review both Lessons 5 and 6, create your plan, and then enter milestones and to-do lists in Basecamp.

Defining Clear and Specific To-Dos

Here are several things to consider when creating your to-do lists:

- Review your estimated milestones for fixed dates and events.
- Define all the tasks that need to be performed, grouping them into to-do lists and related to-do items.
- Determine the sequence in which tasks need to be performed and modify your list if necessary.
- List the person responsible for each to-do list item.
- Estimate the time it should take to complete specific to-do items, if relevant.
- Group your to-do lists under each associated milestone.
- Review your list for missing or redundant to-dos.
- Analyze whether your list is feasible considering your project scope, available resources, and milestone dates.
- Adjust your list until you have a realistic plan.

Estimating To-Do Durations

Not every to-do item requires a time estimate, but in some cases, it's important to give the person responsible an idea of how much time a task should take. This can also help your project from slipping past a deadline.

Here are three techniques for estimating the duration of to-do items:

- **Expert judgment.** This technique emphasizes the professional expertise of both the project manager and team members. In essence, it's a judgment call based on past experience to determine how long a task should take.
- **Analogous estimating.** If you've completed similar projects in the past, use your prior project documentation to determine how long a task should take. This works well if your current project is very similar to a previous project.

- **Three-point estimates.** With this technique, you determine three possible duration scenarios (most likely, optimistic, and pessimistic) and average the three.

> TIP: **Expand on Basecamp's To-Do Functionality with Add-ons**
> The numerous third-party add-ons that integrate with Basecamp enable you to create complex charts and graphs based on your milestones and to-do lists, create to-do estimates, and much more. See Lesson 16, "Integrating Basecamp with Add-ons and Other Applications," for more information.

Understanding To-Do List Permissions

Access to Basecamp's to-do features vary depending on the user's role in the system (account owner, administrator, internal user, or external user).

Basecamp users from external companies who are assigned to a project can do the following:

- View to-dos on the Basecamp Dashboard and the project Overview and To-Do pages. The account owner or an administrator can block this access, however, by specifying that a to-do list is private. See "Creating To-Do Lists" later in this lesson for more information.
- Mark to-do items as complete.
- Comment on to-dos. They can edit their own comments within 15 minutes of posting, but they can't delete comments.
- Add, edit, and delete to-dos, if the account owner or an administrator assigns permission on the Add People, Remove People, and Change Permissions page. See Lesson 3, "Managing People, Companies, and Permissions," for more information.

Users at your company have full access to Basecamp's to-do functionality, except for the ability to delete comments and assign permissions.

Account owners and administrators have full access to all to-do features, including the ability to delete comments and assign permissions.

Creating To-Do List Templates

Before you create a to-do list in Basecamp, consider whether you'll need to create similar lists in the future for other projects. For example, if you design websites, develop software, plan weddings, cater events, or perform any type of regular service, your to-do lists might be very similar for numerous projects. Rather than type this same data over and over again, using a template can save you a lot of time.

Creating a to-do list from a template is an optional Basecamp feature. You can also create your to-do list from scratch if you prefer.

> CAUTION: **Create Templates Before You Create To-Do Lists**
>
> If you want to use to-do list templates, you must create them before creating a new to-do list. You can't create a template from an existing to-do list.

Only the account owner or administrators can create to-do list templates. To do so, follow these steps:

1. From the Basecamp Dashboard, click the Templates tab to open the Templates page, shown in Figure 6.1.

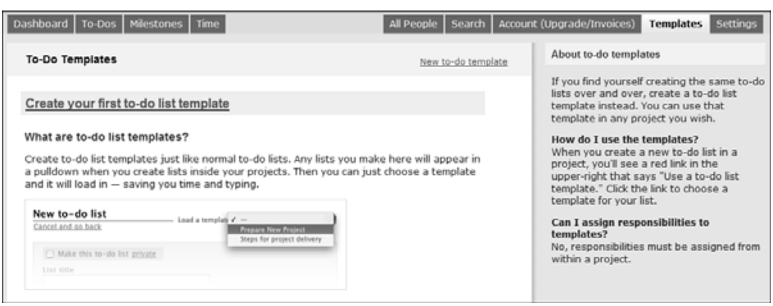


FIGURE 6.1 Save time and maintain consistency with to-do list templates.

2. Click the Create Your First To-Do List Template link. If you've already created a to-do list template, click the New To-Do Template link instead.
3. Enter a title and optional description for your template (see Figure 6.2).

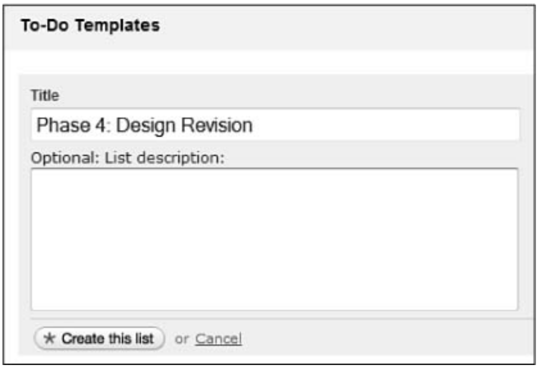


FIGURE 6.2 Enter a template title and description.

4. Click the Create This List button.
5. Enter the first to-do item for your list in the text box (see Figure 6.3).

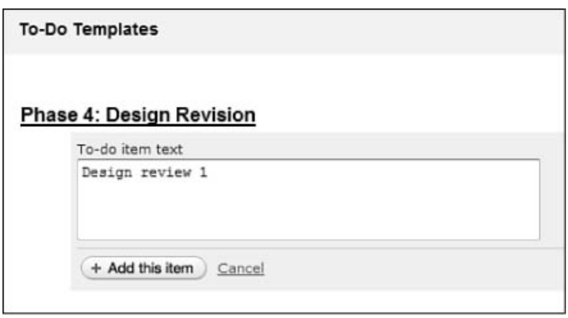


FIGURE 6.3 Start entering to-do items.

6. Click the Add This Item button. Basecamp adds the to-do item.
7. Repeat steps 5 and 6 until you're finished adding to-do items.

> TIP: **Add More To-Do Items Later**
>
> You can add more to-do items to your template at any time by clicking the Add an Item link on the Templates page.

The Templates page displays your to-do list template and its to-do items. Any time you create a to-do list, you can use this template to help you get a fast start on setting up your project. Because the same people might not work on all projects based on a specific template, you can't specify an assigned person on a template. You also can't assign a due date. Instead, you assign to-do items when you create your list.

Editing Templates

You can edit your template and its to-do items at any time. To do so, follow these steps:

1. On the Templates page, mouse over the template or to-do item you want to edit. The Edit link appears to its left, shown in Figure 6.4.

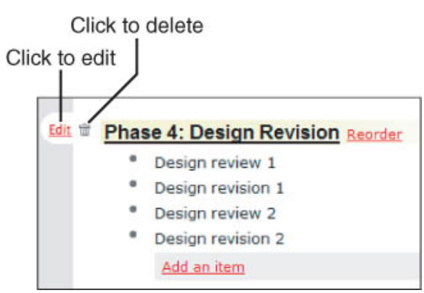


FIGURE 6.4 Edit your templates as your needs change.

2. Click the Edit link.

3. If you're editing a template, you can modify its title and description.

4. If you're editing a to-do item, Basecamp enables you to modify the to-do list text (refer to Figure 6.3).
5. When you're done editing, click the Save Changes button.

Basecamp updates the Templates page with your changes.

Reordering Templates and To-Do Items

Basecamp displays templates and their associated to-do items in the order you create them, but you can reorder these if you like.

To reorder the to-do items on a template, follow these steps:

1. On the Templates page, click the Reorder link next to the template whose items you want to reorder.
2. Drag the to-do items to the order you prefer using the Drag icons, shown in Figure 6.5.

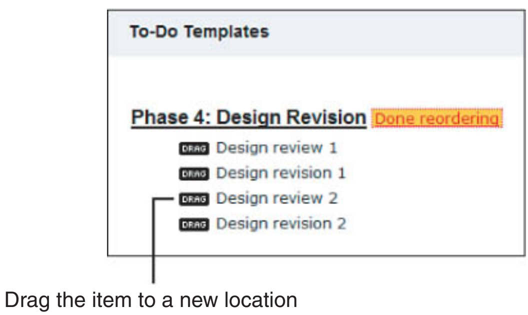


Figure 6.5 Reorder to-do items if they aren't in the right sequence.

3. When you're finished, click the Done Reordering link.

> TIP: **Reorder Templates on the Templates Page**
>
> To change the order of the templates on the Templates page, click the Reorder Lists link in the upper-right corner of the page. Drag the templates to the order you prefer and click the I'm Done Reordering Templates link when you finish.

Deleting Templates

To delete a template or to-do item, follow these steps:

1. On the Templates page, mouse over the template or item you want to delete. The Trash icon appears to the left of its title (refer to Figure 6.4).
2. Click the Trash icon to delete. Basecamp opens a dialog box asking you to confirm this permanent deletion.
3. Click the OK button to confirm.

Basecamp removes the template or to-do item from the Templates page and your Basecamp system.

Creating To-Do Lists

To create your first to-do list for a project, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the To-Do tab to open the To-Do page, shown in Figure 6.6.

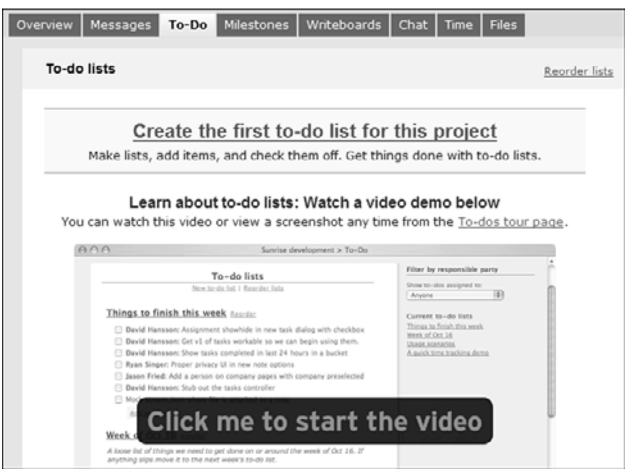


FIGURE 6.6 Basecamp offers assistance when you create your first to-do list.

3. Optionally, view the video demo to take a visual tour of Basecamp's to-do list feature.

4. Click the Create the First To-Do List for This Project link. The New To-Do List page opens, shown in Figure 6.7.

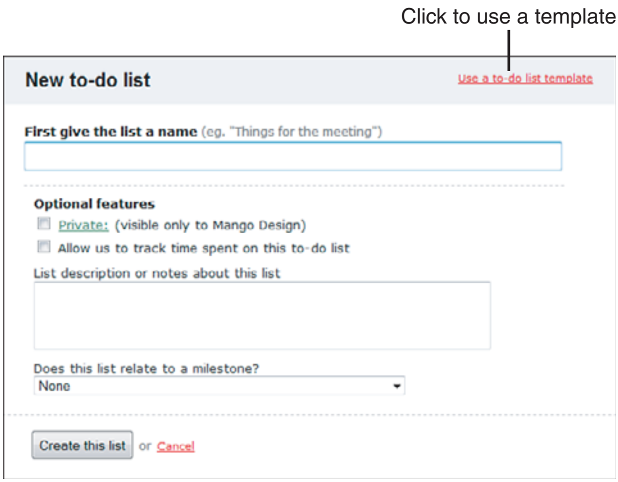


FIGURE 6.7 Create a to-do list for your Basecamp project tasks.

> NOTE: **Where's the Create the First To-Do List for This Project Link?**
>
> The Create the First To-Do List for This Project link appears on the To-Do page only until you create your first to-do list. After that, the initial content that appears on the page is replaced with details about actual to-do lists. Alternatively, you can also create a to-do list by clicking the New To-Do List button on the To-Do page or the New To-Do List link on the Overview page.

5. If you want to create your to-do list based on a template you've already created, click the Use a To-Do List Template link and select a template from the drop-down list. See "Creating To-Do List Templates" earlier in this lesson for more information.

6. If you want to create your to-do list from scratch, enter a title in the First Give the List a Name text box.

7. If you want to share this to-do list only with team members in your own company, select the Private checkbox. People at external companies that you've given permission to access this project won't be able to view this to-do list. If you haven't given any external company project access, this option isn't available.
8. If you want to track time for this to-do list, select the Allow Us to Track Time Spent on This To-Do List checkbox. See Lesson 10, "Tracking and Managing Time," for more information. If your Basecamp plan doesn't support time tracking, this option isn't available.
9. Enter an optional description of the to-do list.
10. If you want to associate this to-do list with a milestone, select the milestone from the drop-down list. Associating your to-do lists with milestones can help keep your project on track by defining to-dos by date. If you haven't set up milestones yet, this option isn't available.
11. Click the Create This List button. Basecamp creates the to-do list and enables you to start adding to-do items to the list. Figure 6.8 shows a to-do list created from a template, which includes all the to-do items from the template you selected.

FIGURE 6.8 A to-do list created from a template.

12. If you created your to-do list from a template and want to assign your to-dos to specific people or make any other changes, you need to edit them. See "Editing To-Do Lists" later in this lesson for more information. If you want to add more to-do items, follow steps 13 through 16. Otherwise, skip to step 17.

13. If you created your to-do list from scratch or you want to enter more to-do items, enter a to-do item in the text box.

14. Select the person responsible for this to-do item from the drop-down list. You can select anyone from your company or any external company that you've given permission to access this project. If there isn't a specific person responsible, select Anyone.

TIP: **Notify Team Members of Their Assigned To-Dos**

If you select anyone other than yourself as the person responsible, the Notify by Email? checkbox appears. To avoid surprises, select this checkbox to notify team members of the to-dos you assign to them.

15. If you want to specify a due date for this to-do, click the When Is It Due? box. A pop-up calendar appears where you can select a due date. If there is no due date, click the No Due Date link. Due dates appear to the right of a to-do item on both the To-Do page and the To-Dos page.

16. Click the Add This Item button. Basecamp adds the to-do item to the page.

17. Repeat steps 13 through 16 until you finish adding to-do items to the list.

TIP: **Add More To-Do Items Later**

You can add more to-do items to your list at any time by clicking the Add an Item link on the To-Do page.

18. Click the I'm Done Adding Items link to close the box.

Editing To-Do Lists

After you create a to-do list and its related to-do items, you might need to change them. For example, you could change the wording of a to-do item, assign or reassign an item to a project team member, or modify email notification settings.

To do so, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.

2. Click the To-Do tab to open the To-Do page.

3. Mouse over the to-do list or to-do item you want to edit. The Edit link appears to its left, shown in Figure 6.9.

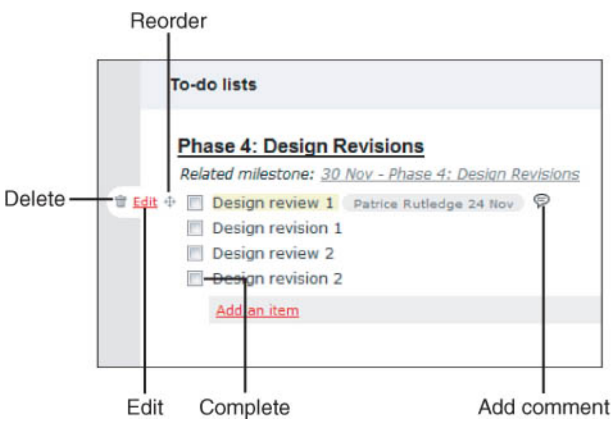


FIGURE 6.9 Easily make changes to your to-dos on the To-Do page.

4. Click the Edit link.

5. If you're editing a to-do list, you can modify the to-do list title and its description, as well as change whether or not you want to enable time tracking or associate with a milestone.

6. If you're editing a to-do item, Basecamp enables you to modify the to-do list text, person responsible, due date, and email notification status. Figure 6.10 shows an example of editing a to-do item.

FIGURE 6.10 The To-Do page expands for you to edit your to-do item.

7. When you're done editing, click the Save Changes button or the Save This Item button. The button name varies depending on whether you're editing a to-do list or to-do item.

Basecamp updates the To-Do page with your changes.

Commenting on To-Do Items

If you want to communicate with other team members about a particular to-do item, you can leave a comment. For example, you might want to remind others about important information relating to this to-do, post a status, and so forth.

To comment on a to-do item, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the To-Do tab to open the To-Do page.
3. Mouse over the to-do item you want to comment on. The Comment icon appears to the right of the to-do title (refer to Figure 6.9).

4. Click the Comment icon to open the Comments on This To-Do page, shown in Figure 6.11.

FIGURE 6.11 Add comments and attach related files.

5. Enter your comments in the Leave a Comment text box.

> NOTE: **Comment Formatting Options**
> You can enter comments as plain text or format your text using HTML or textile codes. See the section "Formatting Message and Comment Text" in Lesson 8, "Posting and Commenting on Messages," for more information.

6. To attach one or more files, click the Attach Files to This Comment link. Click the Browse button (called the Choose Files button on some browsers) and select the files on your computer. Attaching a file is particularly useful if you want project team members to comment on it. Each file must be less than 100MB and counts toward the file storage limit of your Basecamp account plan.

> TIP: **Try the Basic Uploader if You Have Trouble Uploading Files**
>
> Basecamp uses the Advanced Uploader by default, which enables you to upload multiple files. The Advanced Uploader requires that you have Flash 9 or greater installed on your computer and that you haven't installed an ad-blocking plug-in on your browser. If you're having trouble uploading, click the Basic Uploader link, which enables you to upload files one at a time. See Lesson 9, "Sharing Files," for more information about file sharing and storage.

7. Select the team members you want to send email notifications to in the Subscribe People to Receive Email Notifications section. You can notify individuals assigned to this project, both at your company as well as any external company. To save time, you can also choose to notify all people at a company. The people you select will receive email notification when you post your comment and when any related comments are posted.
8. Click the Preview button to preview your comment.
9. If you need to make changes to your comment, click the Edit button to return to the previous page.
10. Click the Add This Comment button to post your comment.

The To-Do page indicates that this to-do item has a comment and lists the number of comments. See "Viewing To-Do Lists" later in this lesson for more information.

Editing To-Do Item Comments

If you discover a mistake in your comment text or decide to change your comment, you can edit it only within 15 minutes of initial posting.

To do so, click the Comment icon on the To-Do page and click the Edit link next to the comment you want to edit. Basecamp lets you know how many minutes are left. Figure 6.12 shows a sample comment that can still be edited.

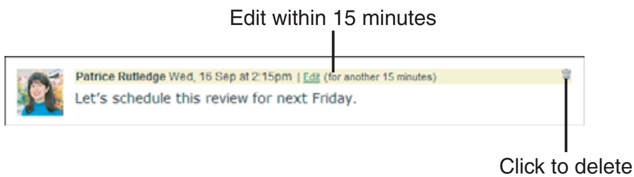


FIGURE 6.12 Basecamp tells you how much longer you can edit a comment.

If time has elapsed on your comment, the Edit link is no longer available.

Deleting To-Do Item Comments

The account owner and administrators can delete comments posted by all members of their project teams, including themselves. Basecamp users can't delete their comments.

To delete a comment, click the Comment icon on the To-Do page and then click the Trash icon next to the comment you want to delete (refer to Figure 6.12).

Again, Basecamp asks you to confirm the deletion.

Completing To-Do Items

When you complete the work required for a specific to-do item, you should mark the item as complete in your Basecamp system. To do so, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the To-Do tab to open the To-Do page (refer to Figure 6.9).
3. Select the checkbox before the to-do item you've completed. Basecamp marks the to-do item complete as of the current date and moves it below the other to-do items for that list.

The Overview page and the Basecamp Dashboard also show the to-do item as completed, with a strikethrough over the to-do title. See "Viewing To-Do Lists" later in this lesson for more information.

> TIP: **You Can Undo a Completed To-Do Item**
>
> If you make a mistake or discover that there is more work to be done on a completed to-do, you can undo the completion by removing the checkbox. Basecamp moves the to-do item back up to the active list.

Reordering To-Do Lists

Basecamp displays to-do lists and their associated to-do items in the order you create them, but you can reorder these if you like.

To reorder a to-do list, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the To-Do tab to open the To-Do page.
3. Click the Reorder Lists link.
4. Drag the lists to the order you prefer using the Move icon, shown in Figure 6.13.

FIGURE 6.13 Reorder to-do lists however you prefer.

5. When you're finished, click the Done Reordering Lists link.

To reorder to-do items on the To-Do page, mouse over the item you want to move and drag the Move icon to the location you prefer.

> TIP: **Move an Item from One To-Do List to Another**
> To move an item between to-do lists, drag it using the Move icon.

Viewing To-Do Lists

You can view your project to-do lists and to-do items in several places on Basecamp. The data you can view and the tasks you can perform depend on where you are at in the Basecamp system.

Viewing To-Dos on a Project's To-Do Page

A project's To-Do page is the primary location for viewing and managing to-do lists. Figure 6.14 shows a sample To-Do page of an in-progress project.

The To-Do page displays to-do lists and their associated to-do items, as well as any related milestones. If a project has existing comments, the Comment icon appears to the right of the milestone title with the number of comments. The Completion checkbox, to the left of the to-do item, is unchecked if the to-do item hasn't been completed yet. If it's been completed, there is a checkmark in this box.

> NOTE: **Entering and Viewing Times for a To-Do Item**
> The Clock icon also appears to the left of a to-do item if you enabled time tracking and your Basecamp account plan supports this feature. Click this icon to enter and view times. See Lesson 10, "Tracking and Managing Time," for more information.

Mouse over the to-do title to display the Trash icon, Edit link, Comment icon, and Reorder icon. Note that the Comment and Reorder icons are available only for to-do items and not to-do lists.

In the right column, you can select the name of a specific project team member from the drop-down list to display only the to-dos for that person.

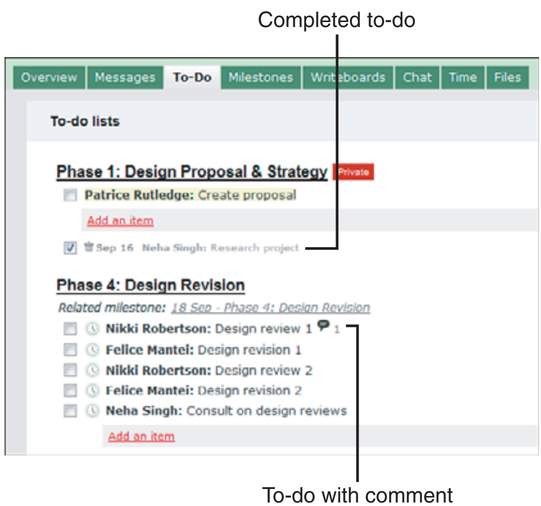


FIGURE 6.14 The To-Do page for a specific project offers detailed information about your to-do lists and items.

Viewing To-Dos on a Project's Overview Page

The Overview page for a specific project displays the latest project information, including to-dos. Figure 6.15 shows an example of this page.

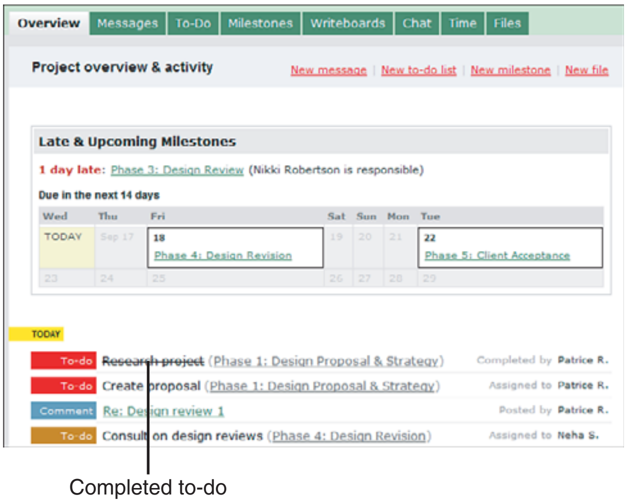


FIGURE 6.15 Get a quick overview of your project, including project to-dos.

Click the to-do link to open a specific to-do list. A strikethrough over the to-do title indicates a completed to-do item.

Viewing To-Dos on the Basecamp Dashboard

The Basecamp Dashboard displays recent activity across all projects, including project to-dos, as shown in Figure 6.16.

Click the to-do link to open a specific to-do list. A strikethrough over the to-do title indicates a completed to-do item. See Lesson 13, “Viewing Project Activity on the Dashboard,” for more information.

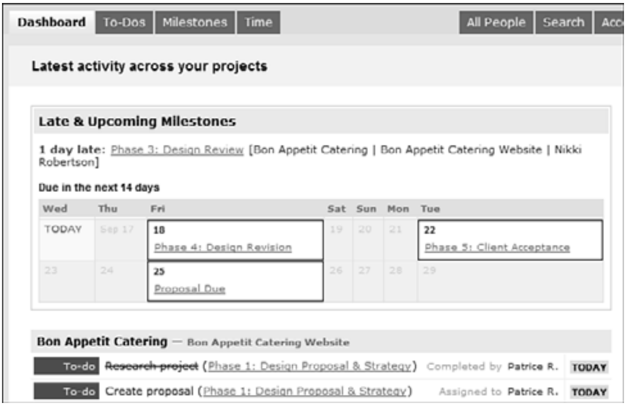


FIGURE 6.16 The Dashboard gives you an overview of your project activity such as to-do items.

Viewing To-Dos on the Dashboard To-Dos Page

From the Dashboard, you can click the To-Dos tab to view your assigned to-do items across all projects. To display to-dos for another user, select that person from the Show Items Assigned To drop-down list. Note that people at external companies can't view this page—only people at your company can.

Figure 6.17 shows a sample of the To-Dos page.

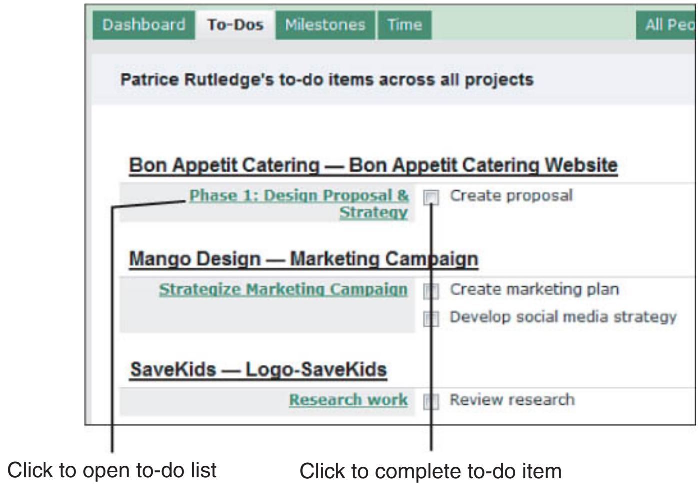


FIGURE 6.17 View a specific users to-dos across projects.

Click a to-do link to open the project To-Do page for that specific to-do list.

You can also mark to-do items as complete on this page by selecting the checkbox to the left of the completed to-do item. The item disappears from the To-Dos page, but remains on the To-Do page as a completed item.

NOTE: **The To-Dos Page and the To-Do Page Are Not the Same Page**

Even though their names are similar, the To-Dos page you reach from the Dashboard and the To-Do page associated with each project serve a different purpose. The To-Dos page focuses on to-dos for all projects, whereas the To-Do page is specific to a particular project.

Deleting To-Do Lists

If you make a mistake when creating a to-do list or decide that you don't need the list, you can delete it. When you delete a to-do list, you also delete any associated to-do items. You can also delete individual to-do items—both open and completed—without deleting the to-do list they belong to.

To delete a to-do list or to-do item, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the To-Do tab to open the To-Do page.
3. Mouse over the list or item you want to delete. The Trash icon appears to the left of its title (see Figure 6.18).

FIGURE 6.18 Click the Trash icon to delete a to-do list or item.

4. Click the Trash icon to delete. Basecamp opens a dialog box asking you to confirm this permanent deletion.
5. Click the OK button to confirm.

Basecamp removes the to-do list or item from the To-Do page and your Basecamp system.

Summary

In this lesson, you learned how to enter and track to-do lists and associated to-do items in your Basecamp system. Next, learn how to view milestones and to-dos on external calendars using the iCalendar feed.

LESSON 7

Working with iCalendar

In this lesson, you learn how to integrate your Basecamp milestones with external calendars.

Understanding iCalendar

Although you can easily view your project milestones in Basecamp, there are times you might want to view this data on an external calendar. To support this need, Basecamp generates an iCalendar feed for each of your projects, as well as a global iCalendar feed that includes all your projects. You can subscribe to one or more feeds from any calendar that supports the iCalendar format to stay updated on your Basecamp milestone and to-do activity.

PLAIN ENGLISH: **iCalendar**

iCalendar is a computer file format for sharing and integrating calendar data. Numerous calendars support the iCalendar format, including Apple iCal, Backpack, Google Calendar, Microsoft Outlook 2007, Mozilla Calendar (Lightning or Sunbird), Windows Calendar, and many more.

PLAIN ENGLISH: **Feed**

A **feed** is a data format that provides regularly updated content that users view in another application. Feeds are most commonly associated with blogs, but you can create a feed from other content as well, such as your Basecamp milestones. In this case, Basecamp syndicates your project data, enabling you to subscribe to it in your favorite calendar application. See Lesson 14, “Working with RSS Feeds,” to learn how to subscribe to other Basecamp feeds.

Subscribing to an iCalendar Feed

The way you subscribe to a Basecamp iCalendar feed varies based on the browser and calendar system you use. As you recall, you can subscribe to an iCalendar feed for a specific project or to a global feed that includes all your projects.

To subscribe to a feed for a specific project, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the Milestones tab to open the Milestones page.

> NOTE: **Consider the Global iCalendar Feed**
>
> To subscribe to the global iCalendar feed that includes all projects, click the Global iCalendar link at the bottom of the Basecamp Dashboard. The subscription process works exactly as it does with a project-specific feed. Although subscribing to your global iCalendar might save time initially, many calendars highlight individual project calendar feeds in a different color, which can be a useful project management tool.

3. Click the Subscribe to iCalendar link that appears on the right side of the Milestones page (see Figure 7.1). Basecamp opens a dialog box prompting you to take action on subscribing to your iCalendar feed. The format and content of this dialog box varies depending on your browser and available calendars on your computer.

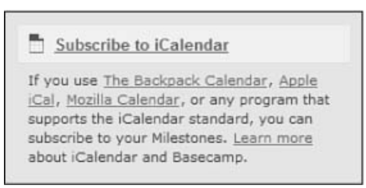


FIGURE 7.1 Subscribe to the iCalendar feed for any project in Basecamp.

TIP: **Subscribe to Your iCalendar Feed Manually**

Optionally, you can also right-click the Subscribe to iCalendar link, select Copy Link Location or Copy Shortcut (depending on your browser), and paste this link manually in your calendar system to subscribe.

The rest of this section provides step-by-step instructions for several calendar systems. Even if these instructions don't describe the specific calendar you use, they should give you an idea of how the subscription process works.

Subscribing to Your iCalendar Feed with Mozilla Calendar

If you use Mozilla Thunderbird with the Lightning Calendar add-in, follow these steps to subscribe to your iCalendar feed:

1. In Basecamp, right-click the Subscribe to iCalendar link or the Global iCalendar link. See "Subscribing to an iCalendar Feed" earlier in this lesson for more information about where to locate these links.

2. Select Copy Link Location or Copy Shortcut from the menu that appears. The exact wording of this text depends on the browser you use.

3. Log in to Thunderbird and click the Calendar button in the lower-left corner of the screen. Your calendar opens.

4. From the menu, select Calendar, New Calendar.

5. In the Create New Calendar dialog box, select the On the Network option button and click Next to continue to the next screen.

6. Select iCalendar (ICS) as your format (see Figure 7.2).

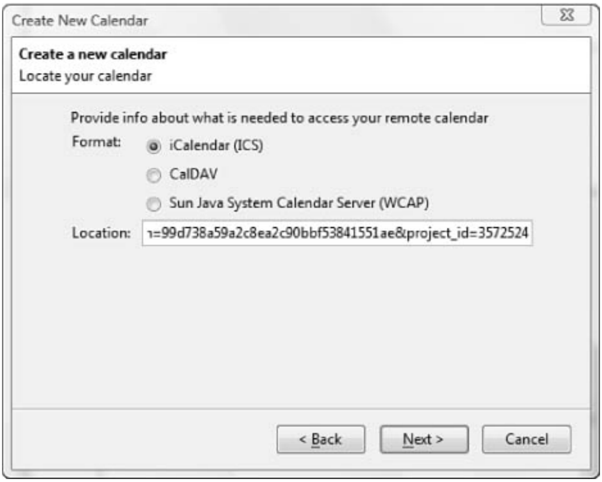


FIGURE 7.2 Select the iCalendar format in Mozilla Thunderbird.

7. Paste the link you copied from Basecamp in the Location text box by pressing Ctrl + V. Click Next to continue.

8. On the Customize Your Calendar screen (see Figure 7.3), enter a name for this calendar and select a color to apply to it.

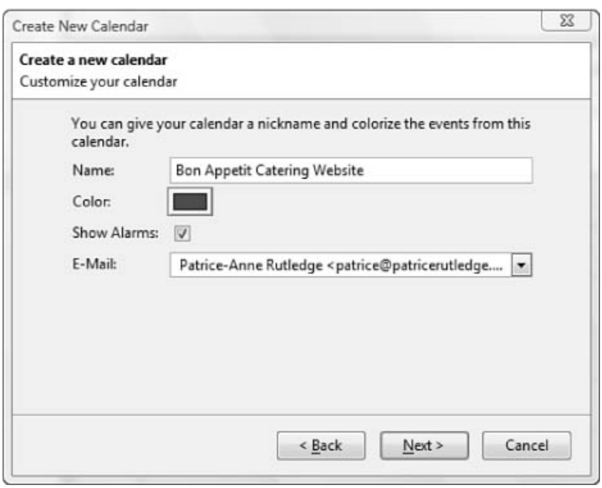


FIGURE 7.3 Color code your Mozilla calendar for easier identification.

9. Optionally, specify whether you want to Show Alarms. Click Next to continue.

10. Click Finish to add milestones to your calendar. Figure 7.4 shows a sample calendar.

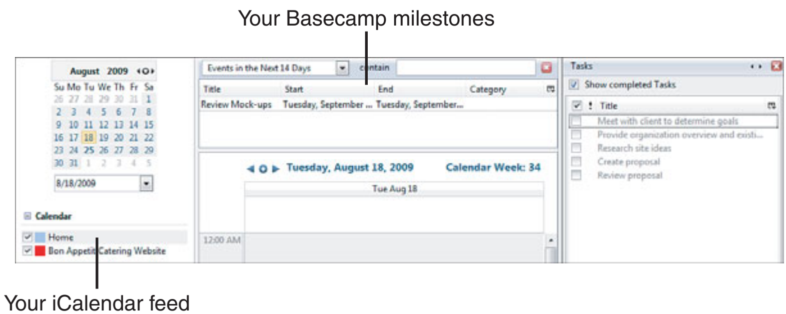


FIGURE 7.4 View your Basecamp milestones in your Mozilla calendar.

> TIP: **Unsubscribe to an iCalendar Feed**
>
> To unsubscribe to an iCalendar feed, select the calendar on the left side of the screen by highlighting it (not with a checkmark). From the menu, select Calendar, Delete Calendar.

Subscribing to Your iCalendar Feed with Windows Calendar

If you use Windows Calendar with Windows Vista, follow these steps to subscribe to your iCalendar feed:

1. Log in to Basecamp using Internet Explorer.

2. Click the Subscribe to iCalendar link or the Global iCalendar link. See "Subscribing to an iCalendar Feed" earlier in this lesson for more information about where to locate these links.

3. If a warning dialog box opens, click the Allow button to continue.

4. In the Subscribe to a Calendar dialog box, click the Next button. Your Basecamp feed loads to Windows Calendar and the Calendar Subscription Settings dialog box opens (see Figure 7.5).

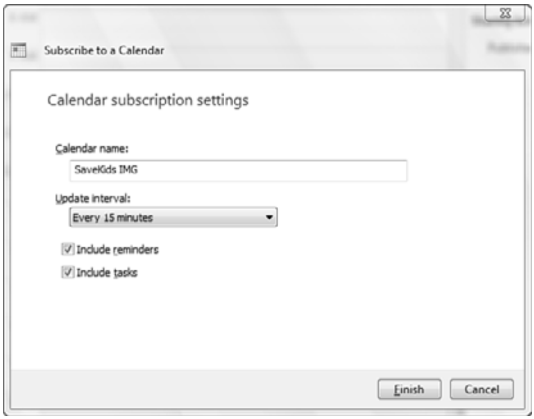


FIGURE 7.5 Determine how often you want to update your calendar.

5. In the Calendar Name field, replace the URL string with a name that's easier to understand, such as the name of your Basecamp project.

6. Select an Update Interval that best matches the frequency of your Basecamp activity. Options include: no update, every 15 minutes, every hour, every day, or every week.

7. If you want to include reminders and tasks on your calendar, select the appropriate checkboxes.

8. Click the Finish button.

Windows Calendar displays data from your Basecamp iCalendar feed, shown in Figure 7.6.

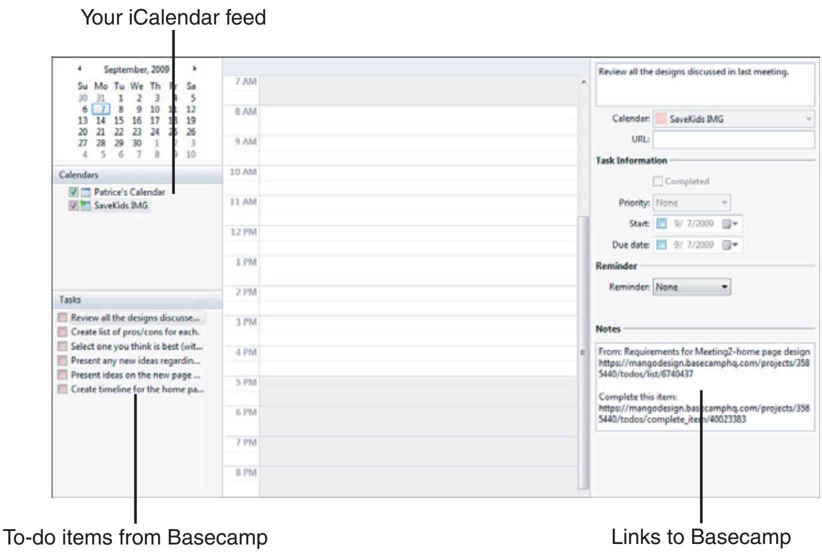


FIGURE 7.6 View your Basecamp milestones and related to-do items in Windows Calendar.

Subscribing to Your iCalendar Feed with Backpack

If you use 37signals' collaborative organizational tool Backpack (www.backpackit.com), follow these steps to subscribe to your iCalendar feed:

> CAUTION: **Backpack Isn't Included with Basecamp**
>
> Backpack is an individual 37signals application with a separate monthly pricing structure. You need to sign up for a Max, Premium, Plus, or Basic plan to receive the group calendar feature and integrate with Basecamp.

1. In Basecamp, right-click the Subscribe to iCalendar link or the Global iCalendar link. See "Subscribing to an iCalendar Feed" earlier in this lesson for more information about where to locate these links.

2. Select Copy Link Location or Copy Shortcut from the menu that appears. The exact wording of this text depends on the browser you use.
3. Go to your Backpack URL and log in to your Backpack account.

> TIP: **Use the Open Bar to Access Backpack**
>
> Alternatively, click the Backpack link on the Open Bar if you've integrated Basecamp and Backpack using OpenID. See Lesson 16, "Integrating Basecamp with Add-ons and Other Applications," for more information.

4. Click the Calendar tab to open your calendar.
5. Click the Add a Calendar link on the right side of the screen (see Figure 7.7).

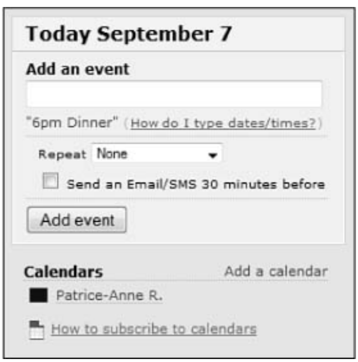


FIGURE 7.7 In Backpack, you can add your Basecamp iCalendar feed as a calendar.

6. Paste the iCalendar link in the Name the New Calendar text box.
7. Choose a color for your calendar data.
8. Click the Add Calendar button. Your Backpack calendar displays your milestone and to-do items from Basecamp (see Figure 7.8).

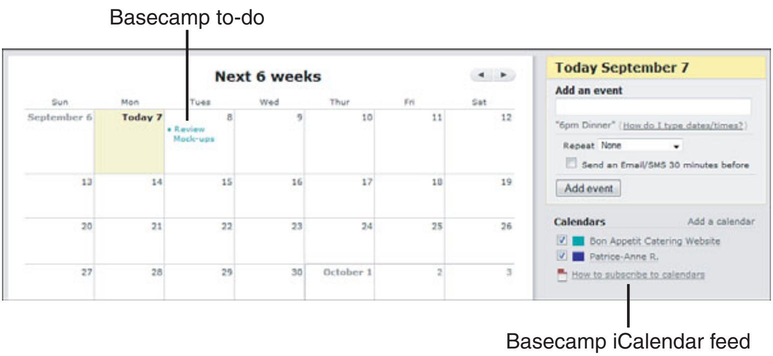


FIGURE 7.8 Basecamp data now appears in Backpack.

Subscribing to Your iCalendar Feed with Apple iCal

If you use iCal on a Macintosh, follow these steps to subscribe to your iCalendar feed:

1. In Basecamp, right-click (or control-click if you have a single button mouse) the Subscribe to iCalendar link or the Global iCalendar link. See "Subscribing to an iCalendar Feed" earlier in this lesson for more information about where to locate these links.
2. Select Copy Link Location from the menu that appears. The exact wording of this text depends on the browser you use.
3. Launch iCal (located in your Applications folder).
4. From the Calendar menu, select Subscribe…
5. Paste the link you copied from Basecamp in the Location text box by pressing Command + V. Click Next to continue.
6. On the Customize Your Calendar screen, enter a name for this calendar and select a color to apply to it. Optionally, specify whether you want to Remove Alarms, Attachments, or To-Do items. You may also choose to have it auto refresh here.
7. Click OK to Continue.

Your new calendar displays according to the criteria you entered.

Troubleshooting Problems with iCalendar

Although the iCalendar feed is a great way to integrate Basecamp data into your calendar, the complexity of dealing with different applications and browsers might cause some confusion. Here are some tips if you're having trouble subscribing to an iCalendar feed:

- Try subscribing manually. To do so, right-click the iCalendar subscription link, copy, and paste the link in your calendar. See "Subscribing to an iCalendar Feed" earlier in this lesson for more information. Also, read the documentation or online help for your calendar for details on subscribing to iCalendar feeds or adding new calendars.
- Try replacing the webcal:// prefix in your feed with http://. Not every calendar recognizes webcal://.
- Verify that your calendar supports iCalendar. Many, but not all, calendar systems support this format.
- Check to see if you have the right software version. For example, Basecamp integrates with Microsoft Outlook 2007, but not previous versions.
- Verify that you haven't changed your Basecamp password recently. Changing a password resets your iCalendar feeds, so you'll need to subscribe to your feeds again.

Summary

In this lesson, you learned how to view your Basecamp milestones in other calendars using the iCalendar feed. Next, learn how to master Basecamp's messaging and commenting features.

LESSON 8

Posting and Commenting on Messages

In this lesson, you learn how to collaborate on Basecamp using messages.

Posting a Message

Messages are a key collaboration tool in Basecamp. You can use them to communicate informally with project team members, or you can use them as a project approval tool. All users assigned to a project can post messages, leave comments, and upload files.

To create your first message for a project, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.

2. Click the Messages tab to open the Messages page, shown in Figure 8.1.

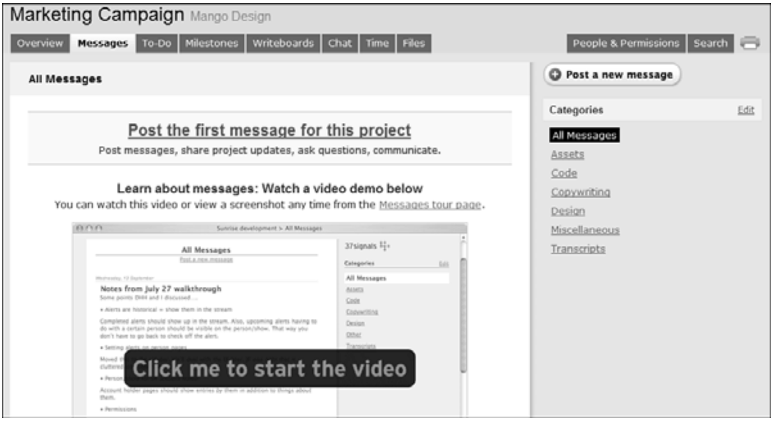


FIGURE 8.1 The Messages page helps you get started on entering your first project message.

3. Optionally, view the video demo to take a visual tour of Basecamp's message feature.

4. Click the Post the First Message for This Project link. The Post a New Message page opens, shown in Figure 8.2.

FIGURE 8.2 Create a message and attach any related files.

> NOTE: **Where's the Post the First Message for This Project Link?**
>
> The Post the First Message for This Project link appears on the Messages page only until you create your first message. After that, the initial content that appears on the page is replaced with details about actual message activity. Alternatively, you can also create a message by clicking the New Message link on the Overview page or the Post a New Message button on the Messages page.

5. Enter a message Title in the text box. This field is required.
6. Select a message Category from the drop-down list.
7. If the category you want doesn't appear in the list, select Add a New Category and enter the category name in the dialog box that opens. Click OK to add this new category to the drop-down list.

> NOTE: **Understanding Default Message Categories**
>
> The categories in this list come from the default message categories you set up on the Settings page. You can add another category specific to this project, but any default message categories you add or delete will only apply to future projects, not existing projects. See Lesson 2, "Customizing Your Basecamp Workspace," for more information about setting up default message categories.

8. Enter your message in the Message Body text box. See "Formatting Message and Comment Text," later in this lesson, for more information about how to format the content in this field.
9. To enter extended text, click the Show Extended Message Body link and enter additional text in the Extended Message text box. When you select Expanded View on the Messages page, you must click the Continued link to view the text you enter in this field.

10. If you want to share this message only with users in your own company, click the Private Message checkbox. Users at external companies such as clients or vendors won't be able to see your message. If you haven't given any external companies permission to access your project, this checkbox isn't available.

> NOTE: **Not All Plans Allow You to Attach Files**
>
> If you have a free Basecamp account, you receive an error message if you try to attach any files. See Lesson 1, "Getting Started with Basecamp," for more information about which account plans include file sharing and your file storage limits.

11. To attach one or more files, click the Browse button and select the files on your computer. Depending on your browser and operating system, this button could be named Choose File instead. Attaching a file is particularly useful if you want project team members to comment on it. Each file must be no larger than 100MB and counts toward the file storage limit of your Basecamp account plan.

> TIP: **Try the Basic Uploader if You Have Trouble Uploading Files**
>
> Basecamp uses the Advanced Uploader by default, which enables you to upload multiple files. The Advanced Uploader requires that you have Flash 9 or greater enabled on your computer and that you haven't installed an ad-blocking plug-in on your browser. If you're having trouble uploading, click the Basic Uploader link, which enables you to upload files one at a time. See Lesson 9, "Sharing Files," for more information about file sharing and storage.

12. If this message relates to a milestone, select the milestone from the Does This Message Relate to a Milestone drop-down list. A link to this message will appear below the related milestone on the Milestones page.

> NOTE: **Why Can't I Relate My Message to a Milestone?**
>
> This field doesn't appear if you haven't entered any milestones yet. See Lesson 5, "Entering and Tracking Milestones," for more information.

13. If this message signifies the completion of the milestone, select the Complete the Milestone checkbox. The milestone will be marked as completed on the Milestones and Overview pages for the project and on the Basecamp Dashboard.

14. Select the team members you want to send email notifications to in the Subscribe People to Receive Email Notifications section. You can notify individuals assigned to this project, both at your company as well as any external company. To save time, you can also choose to notify all people at a company. The people you select will receive email notification when you post your initial message and when any related comments are posted.

> TIP: **Unsubscribe to Message Activity**
>
> Basecamp users can unsubscribe to any message by clicking the Unsubscribe link on that message's detail page.

15. Click the Preview button to preview what your message looks like.

16. If you want to make additional changes, click the Edit button.

17. When you're finished with your message, click the Post This Message button to post to Basecamp and send any email notifications.

Your message appears on the Messages and Overview pages, as well as the Basecamp Dashboard. See "Viewing Messages and Comments" later in this lesson.

Leaving Message Comments

To comment on an existing message, follow these steps:

1. Open the message on which you want to comment. You can find messages on the Basecamp Dashboard or on the Overview or Messages page for a specific project.

2. Enter your comments in the Leave a Comment text box, shown in Figure 8.3. See "Formatting Message and Comment Text" later in this lesson for more information about text formatting options.

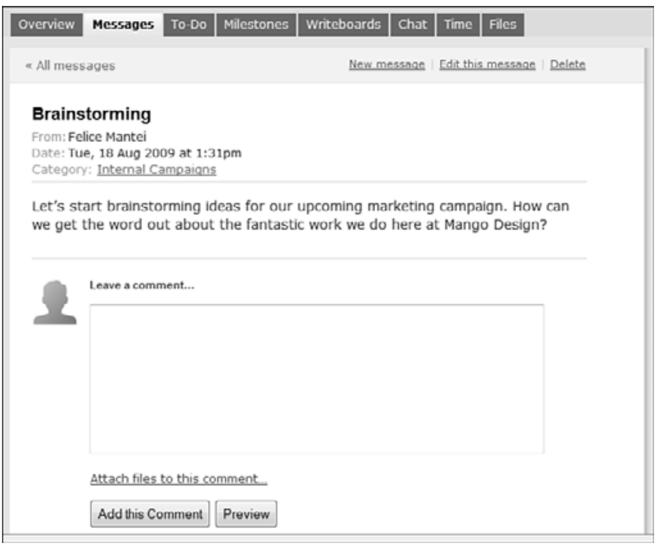


FIGURE 8.3 Enter a comment if you have something to add to the discussion.

> TIP: **View Attached Files**
>
> If you want to review a file attached to messages or other comments, click the file link to open it in another window. Image files appear as thumbnails. If more than one image is attached, you can click the View All These Images at Once link to preview them in another window.

3. If you want to attach a file related to your comment, click the Attach Files to This Comment link. The page expands to include a Browse button, which functions the same way as the Browse button on the Post a New Message page.

4. Click the Preview button to preview your comment.

5. If you need to make changes to your comment, click the Edit button to return to the previous page.

6. Click the Add This Comment button to post your comment. Comments appear on the Messages and Overview pages, as well as on the Basecamp Dashboard.

CAUTION: **You Can Only Edit Comments for 15 Minutes**

If you want to edit your comment, you can do so, but only for up to 15 minutes after posting. After 15 minutes, your only option is for an account owner or administrator to delete the comment. See "Editing Messages and Comments," and "Deleting Messages and Comments," later in this lesson.

Formatting Message and Comment Text

Basecamp provides several options for formatting your message and comment text. You can use the following:

- Plain text
- Textile formatting
- HTML, JavaScript, or PHP

PLAIN ENGLISH: **Textile**

Textile is a simple text markup language that can be converted to HTML for web viewing. Visit http://textile.thresholdstate.com for more information about using Textile.

Plain text is obviously the easiest way to create a message. Just type what you want to say and post. Of course, there will be times when you want to use common formatting, such as bolding or italics. Using textile formatting, you can bold text by surrounding it with asterisks, such as *Basecamp*. To italicize, surround the text with underscores (_Basecamp_).

If you're familiar with HTML, you could also use HTML tags to accomplish the same thing:

```
<b>Basecamp</b>
<i>Basecamp</i>
```

> TIP: **Keep Formatting Simple**
>
> Although Basecamp provides a lot of flexibility in formatting your messages, it's a good idea to communicate anything complex in an attached file. For example, rather than trying to format a table in a message, attach a Word or Excel file instead. Another option is to use the writeboard feature to collaborate on a document. See Lesson 11, "Collaborating with Writeboards," for more information.

If you plan to enter code for project team members to review, you need to be sure that it displays correctly. For example, let's say that you enter the following in a message:

```
<b>This text is bolded.</b>
```

When it's posted, it appears as bolded text, without the HTML tags. This is fine if you want bolded text, but what if you want your team members to comment on the actual HTML code? In that case, you can use the HTML tags <code> or <pre> to prevent the code from being rendered in the browser.

For example, you could enter the following:

```
<pre>
<b>This text is bolded.</b>
</pre>
```

For multiline code blocks, use <pre>. For inline code, use <code>.

> TIP: **Use Third-Party Add-Ons for Complex Code**
>
> If you plan to review a lot of code using Basecamp messages, you might want to consider third-party add-ons to simplify the process. Two options to try include Pastie (http://pastie.org), a code-pasting service, or Orbeon's Markup to Basecamp tool (http://wiki.orbeon.com/forms/contributions/escaping-markup-for-basecamp-textile).

Sending a Comment by Email

If you're subscribed to receive email notifications of message and comment activity on your Basecamp project, you can submit comments by replying to those emails.

To do so, open the email you want to comment on and send your comments in a reply. Be sure to enter your comments above the line that says: Reply ABOVE THIS LINE to post a comment to the project.

Figure 8.4 shows a sample email reply.

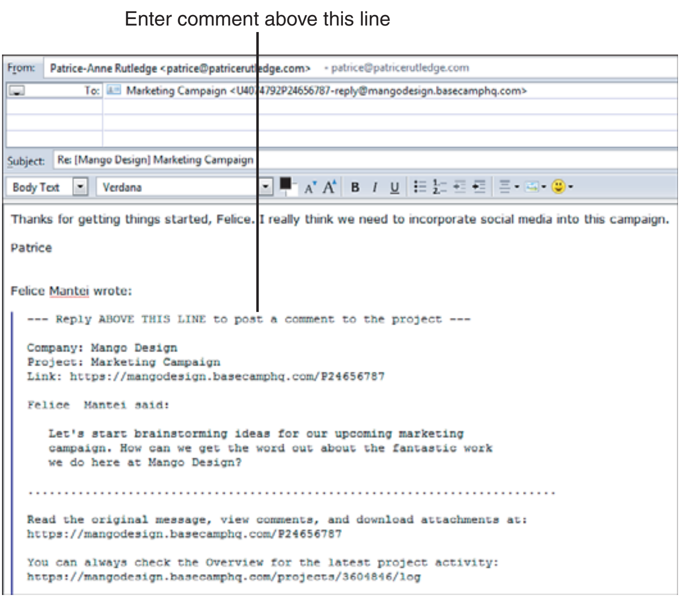


FIGURE 8.4 Submit comments to Basecamp by email.

Comment replies must be in plain text format only. You can, however, attach a file to your email that will be uploaded as an attachment to your comment.

When Basecamp receives your comment by email, it's posted just like a comment you entered on the web.

> NOTE: **You Can't Submit an Original Message by Email**
>
> Email submissions works only for comments. You can't submit a message by email.

Viewing Messages and Comments

To view your project messages and comments, click the Messages tab.

On the Messages page, you can sort messages by category. To do so, click the category you want to view in the Categories list on the right side of the screen. The account owner and administrator can also rename, delete, or add another category by clicking the Edit link. See Lesson 2, "Customizing Your Basecamp Workspace," for more information about setting up message categories.

> NOTE: **Other Ways to View Message Activity**
>
> You can also view message and comments activity on the Basecamp Dashboard and the Overview page for each project. See Lesson 13, "Viewing Project Activity on the Dashboard," for more information.

Using Expanded View

Expanded View is the default view for the Messages page, shown in Figure 8.5.

Expanded View displays the text entered in the Message Body text on the Post a New Message page. You can view text entered in the Extended Message text box by clicking the Continued link to open the complete message. This view also provides additional details on any attachments and links to edit the message or post comments.

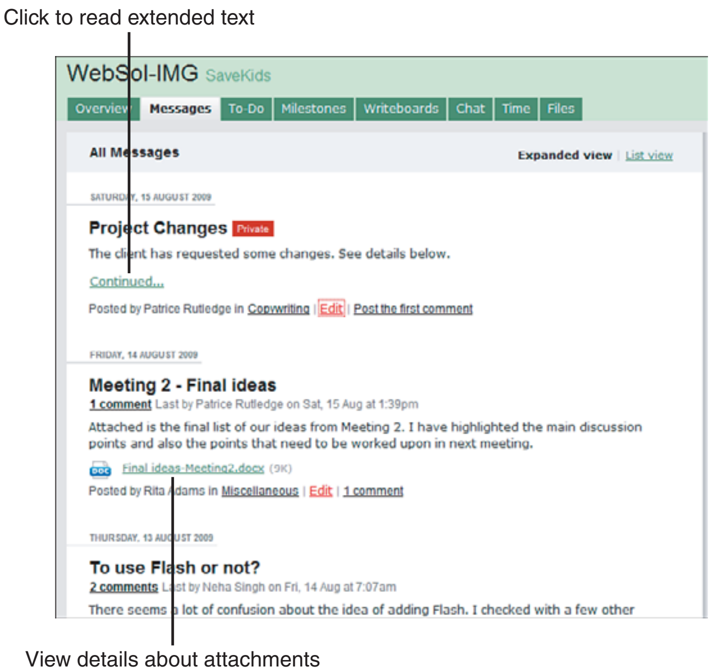


FIGURE 8.5 You can view details about attachments with the Expanded View.

Using List View

Click the List View link on the Messages page to view a list of your messages (see Figure 8.6).

With List View, you can see:

- A list of all project messages in chronological order (the most recent messages appear at the top of the list).
- Which messages are new or have new comments, identified with the green icon.
- Which messages you've already read, identified with the gray icon.
- Who posted each message and when.

- Who posted the last comment and when.
- How many comments each message has received, identified by a number to the left of the message title. If no number appears, the message has no comments.
- Which messages are private, marked by the red Private icon.
- Which messages have attached files, identified with the Paperclip icon.

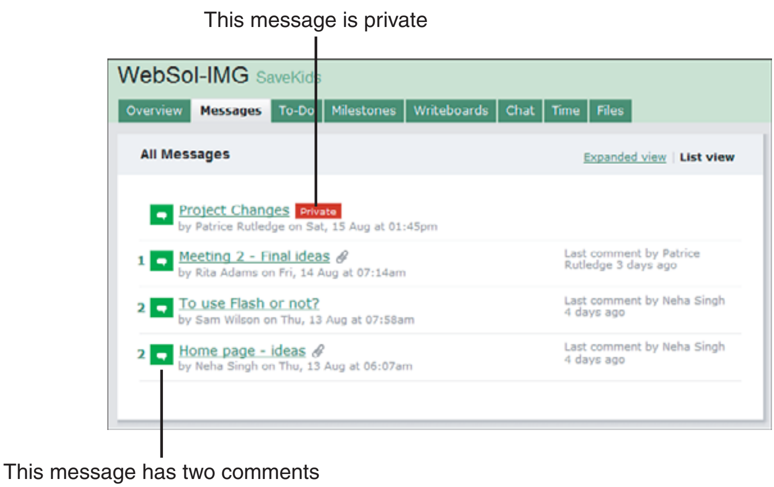


FIGURE 8.6 View a simple list of all message activity on your project.

Click a message link to open the individual message and read its contents and related comments. Figure 8.7 shows a sample message with comments.

If you log out of Basecamp with List View selected on the Messages page, this view becomes your default the next time you log in. You can change your default back to Expanded View by selecting it before you log out of Basecamp again.

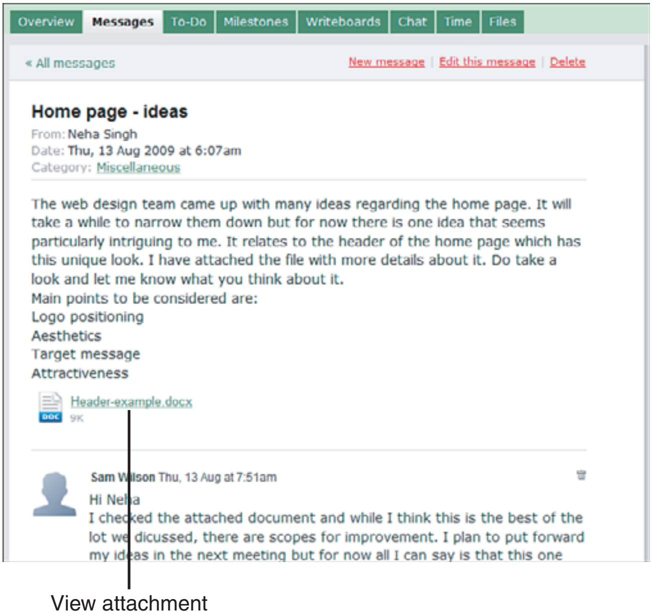


FIGURE 8.7 View individual messages and reply to them.

Editing Messages and Comments

To edit a message, follow these steps:

1. Open the message you want to edit and click the Edit This Message link. Alternatively, click the Edit link next to the message you want to edit on the Messages page with Expanded View selected. The Edit This Message page opens, where you can modify your message. This page is almost identical to the Post a New Message page, described in the "Posting a Message" section earlier in this lesson.

2. Make any desired changes to your message.
3. If you want to notify the people who are subscribed to the message that you've modified it, select the Yes, Notify the Subscribers Above of These Changes via Email checkbox.
4. Click the Save Changes button.

You can also edit message comments, but only for up to 15 minutes after making them. To do so, open the message and click the Edit link next to the comment you want to edit. Basecamp lets you know how many minutes are left. Figure 8.8 shows a sample comment that can still be edited.

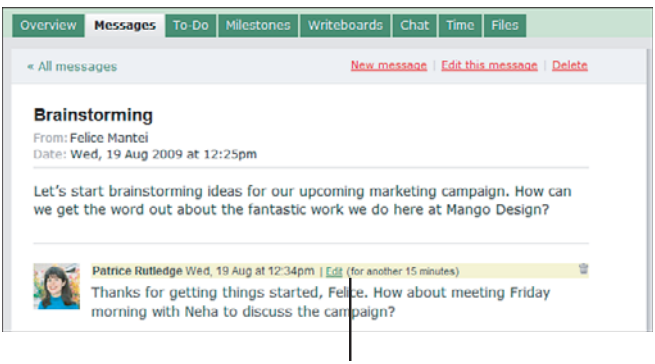


FIGURE 8.8 Basecamp tells you how much longer you can edit a message comment.

If time has elapsed on your comment, the Edit link is no longer available.

> NOTE: **Basecamp Editing Permissions**
>
> Basecamp users can edit only messages and comments that they posted. The account owner and administrators can edit their own messages and comments, as well as messages of project team members. Remember that the 15-minute time limit for editing comments applies to everyone.

Deleting Messages and Comments

The account owner and administrators can delete messages and comments posted by all members of their project teams, including themselves. Basecamp users can delete their own messages, but not comments.

Open the message you want to delete or whose comments you want to delete, shown in Figure 8.9.

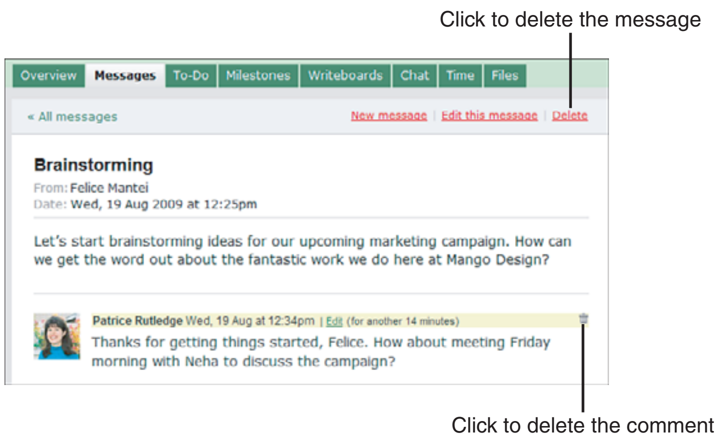


FIGURE 8.9 You can quickly delete messages and comments, but remember that your deletion is permanent.

On this message detail page, you can click the Delete link to delete the entire message and all related comments. Click OK on the warning dialog box that opens to confirm that you want to delete the message.

To delete an individual comment, click the Trash icon to the right of that comment. Again, Basecamp asks you to confirm the deletion.

CAUTION: **You Can't Undo a Deletion**

Be sure that you really want to delete a message or comment before doing so. Basecamp deletions are permanent, and there is no undo.

Summary

In this lesson, you learned how to collaborate on Basecamp using messages and comments. Next, learn more about sharing files on Basecamp.

LESSON 9

Sharing Files

In this lesson, you learn how to collaborate with Basecamp's file sharing functionality.

Uploading Files

The ability to share and collaborate on files is critical to managing many types of projects. With the exception of the free account plan, all Basecamp plans offer hosted file storage.

> NOTE: **Can I Host Files on My Own FTP Server?**
>
> Basecamp no longer offers the option of FTP File Storage, which was a temporary solution before the introduction of Basecamp File Storage. Customers who originally used FTP storage can continue to do so, but new customers must use Basecamp's file storage solution.

To upload your first file for a project, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.

2. Click the Files tab to open the Files page, shown in Figure 9.1.

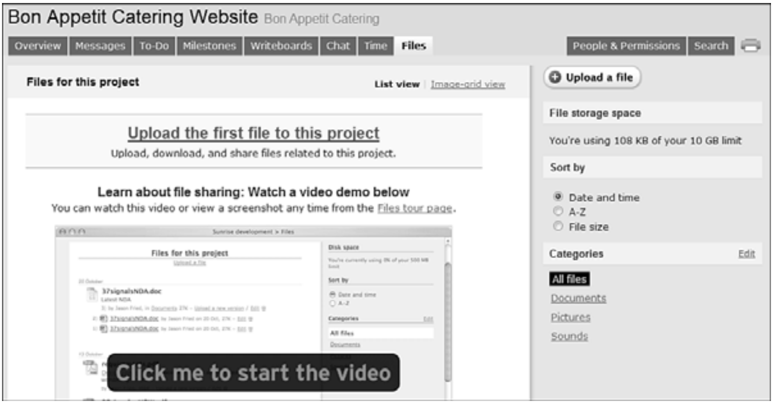


FIGURE 9.1 The Files page helps you get started on uploading your first project file.

3. Optionally, view the video demo to take a visual tour of Basecamp's file sharing feature.
4. Click the Upload the First File to This Project link. The Upload a File page opens, shown in Figure 9.2.

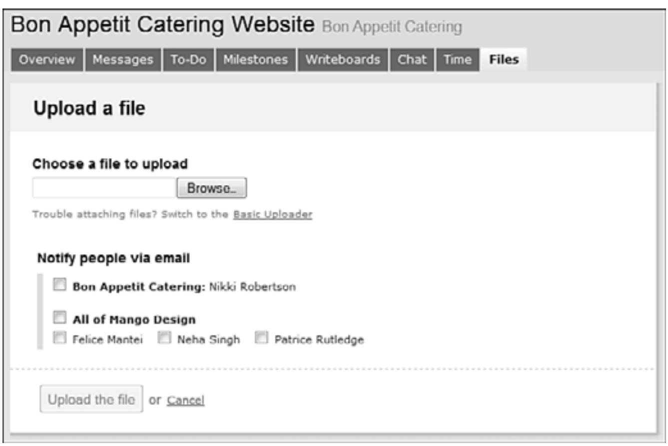


FIGURE 9.2 Upload files of up to 100MB in size.

NOTE: Where's the Upload the First File to This Project Link?

The Upload the First File to This Project link appears on the Files page only until you upload your first file. After that, the initial content that appears on the page is replaced with details about actual files. Alternatively, you can also upload a file by clicking the New File link on the Overview page or the Upload a File button on the Files page.

5. Click the Browse button to select one or more files from your computer. Depending on your browser and operating system, this button could be named Choose File instead. Each file must be no larger than 100MB and counts toward the file storage limit of your Basecamp account plan. A box appears on the page for each file you selected to upload, shown in Figure 9.3.

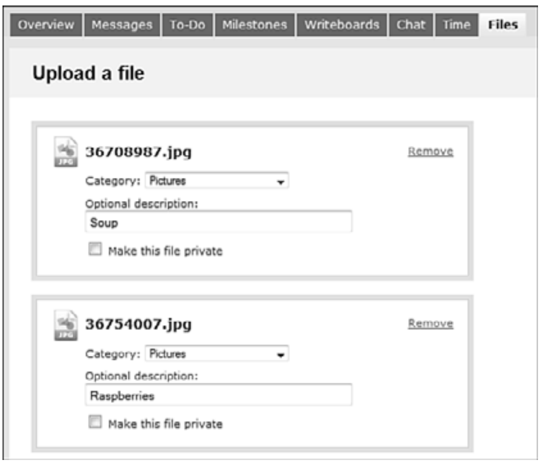


FIGURE 9.3 Enter details about each file you upload.

TIP: Try the Basic Uploader if You Have Trouble Uploading Files

Basecamp uses the Advanced Uploader by default, which enables you to upload multiple files. The Advanced Uploader requires that you have Flash 9 or greater installed on your computer and that you haven't installed an ad-blocking plug-in on your browser. If you're having trouble uploading, click the Basic Uploader link, which enables you to upload files one at a time.

6. Select an optional file Category from the drop-down list for each file you uploaded.

7. If the category you want doesn't appear in the list, select Add a New Category and enter the category name in the dialog box that opens. Click OK to add this new category to the drop-down list.

> NOTE: **Understanding Default File Categories**
>
> The categories in this list come from the default file categories you set up on the Settings page. You can add another category specific to this project, but any default file categories you add or delete will only apply to future projects, not existing projects. See Lesson 2, "Customizing Your Basecamp Workspace," for more information about setting up default file categories.

8. Enter an Optional Description for each file.

9. For each file that you want to share only with users in your own company, click the Make This File Private checkbox. Users at external companies such as clients or vendors won't be able to view your file. If you haven't given any external company permission to access your project, this checkbox isn't available.

10. If you decide to upload additional files, click the Browse button, which appears at the end of the list of files to upload. Again, this is the Choose File button when using certain browsers.

11. Select the team members you want to notify of this file upload in the Notify People via Email section. You can notify individuals assigned to this project, both at your company as well as any external company. To save time, you can also choose to notify all people at a company.

12. When you're finished uploading files, click the Upload the File button to post to Basecamp and send any email notifications.

Your file appears on the Files and Overview pages, as well as the Basecamp Dashboard. See "Viewing Project Files" later in this lesson.

> TIP: **You Can Attach Files While Performing Other Basecamp Tasks**
>
> You can also attach files to messages and comments, including comments associated with to-dos and milestones. See the lessons that cover these tasks for more information.

Viewing Project Files

To view a list of all files related to your project, click the Files tab. Figure 9.4 shows the Files page.

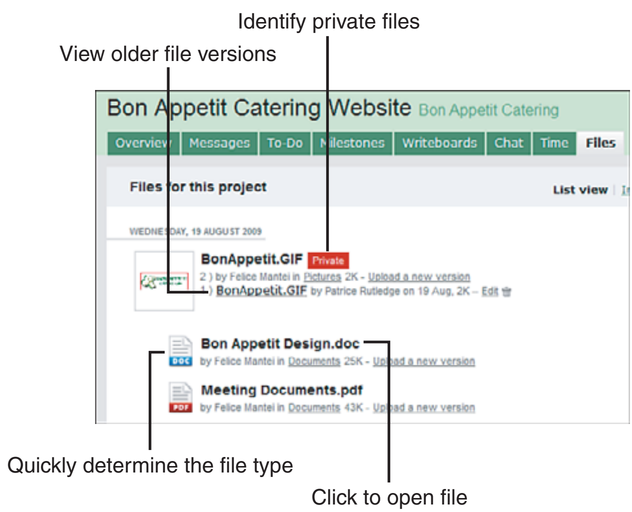


FIGURE 9.4 Get a quick overview of all your Basecamp project files.

On the Files page, you can do the following:

- View the amount of file storage you've used and the file storage limit for your account plan.

- Sort files by date and time, in alphabetical order, or by file size.
- View files by category. To do so, click the category you want to view in the Categories list on the right side of the screen. The account owner and administrator can also rename, delete, or add another category by clicking the Edit link. See Lesson 2, “Customizing Your Basecamp Workspace,” for more information about setting up file categories.
- Edit, delete, and upload new versions of files. The rest of this lesson covers how to handle these tasks.

> TIP: **Other Ways to View File Activity**
>
> You can also view file activity on the Basecamp Dashboard and the Overview page for each project. See Lesson 13, “Viewing Project Activity on the Dashboard,” for more information.

Using List View

List View (refer to Figure 9.4) is the default view on the Files page, which lists all your files in chronological order with a link to access each file.

With List View, you can see the following:

- Thumbnail previews of image files
- For all files other than image files, an icon depicting the type of file (DOC, PDF, and so forth) so that you immediately know what kind of file it is
- Who uploaded the file and when
- Previous versions of the file
- Which files are private, marked by the red Private icon
- Links to any related messages

When you click a file link, one of the following actions occurs depending on your operating system, your browser, and the applications installed on your computer:

- The file opens automatically in another window. This is most common with images or PDFs, if you have Adobe Reader or another PDF-viewing application installed.
- The file downloads automatically to your computer.
- A dialog box asks you whether you want to open the file or save it (see Figure 9.5). If you choose to open the file, the dialog box offers a suggestion for the appropriate application to use. You can also click the drop-down arrow and choose another application if the suggestion isn't what you want.

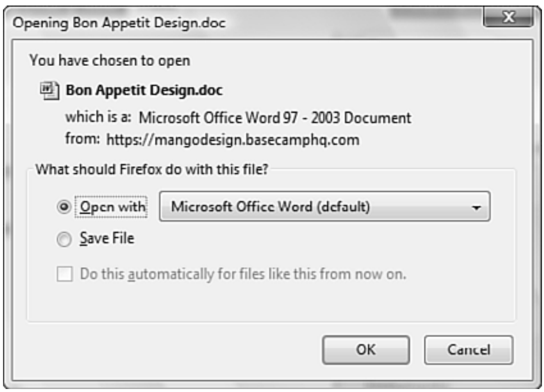


FIGURE 9.5 You can view or download Basecamp project files.

If you make any changes to an open or downloaded file, you must upload the new version again to share your changes with other project team members. See "Uploading New File Versions" later in this lesson for more information.

Using Image-Grid View

If you upload many images in GIF, JPG, or PNG format, you can view them on one page by clicking the Image-Grid View link. Figure 9.6 shows an example of this view.

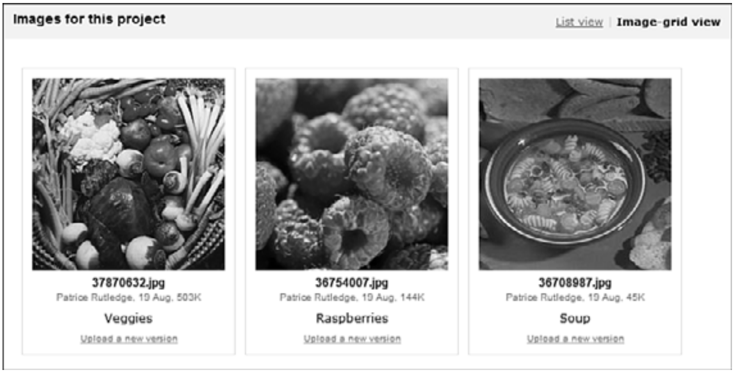


FIGURE 9.6 Preview your images all in one place.

With Image-Grid View, you can view thumbnail images in a visual grid, sized at 200×200. Mouse over a file to view the Edit link and Trash icon.

NOTE: **Where Are My Files?**

Remember, the Image-Grid View displays only images in GIF, JPG, or PNG format. If you have images in another format, such as TIF, they won't appear. Other files, such as Microsoft Word or Excel documents, PDFs, and so forth, also don't appear in this view. Additionally, Basecamp didn't start creating thumbnails until May 2007. Images that you uploaded prior to this date won't appear in Image-Grid View either. If it's important to view all your images with this view, you can upload older images again.

Editing File Details

To edit information about a file you've uploaded, click the Edit link below the file name on the Files page. The page expands (see Figure 9.7), enabling you to do the following:

- Change the file name.
- Enter a new description.
- Select a new category.

- Select the Private checkbox to make the file visible only to project team members in your company. If this checkbox is already selected, removing the checkmark makes the file public.

Click the Save Changes button to save your edits.

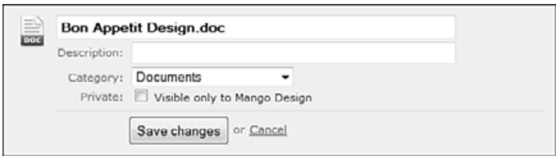


FIGURE 9.7 Change the name or category of your existing file.

If you uploaded the file as part of a message or comment, the Description and Private fields aren't available.

Uploading New File Versions

Keeping your Basecamp system updated with the latest project information is critical. Fortunately, you can easily update Basecamp with the latest version when you make changes to project files. You can't edit a file online, however. You must download the file to your computer, update it, and upload a new version to Basecamp.

To upload a new version of a file already posted to Basecamp, click the Upload a New Version link below the file name on the Files page. The Upload a New Version page opens, which is nearly identical to the Upload a File page described in the "Uploading Files" section earlier in this lesson.

After you upload a new version, the Files page opens again, shown in Figure 9.8.

FIGURE 9.8 View previous versions of your files on the Files page.

The new file becomes the active file, replacing the old file that now appears in a list below the file name. You can retain previous files for your reference, or delete them if you need additional file storage space.

Deleting Files

If you no longer need a file that you uploaded to Basecamp, you can delete it. This also helps free up more file storage space. On the Files page (see Figure 9.4), click the Trash icon next to the file you want to delete. Basecamp displays a warning message, asking you to confirm that you want to delete the file. Click OK to permanently delete the file.

Summary

In this lesson, you learned how to upload, share, and manage files on Basecamp. Next, learn more about tracking time.

LESSON 10

Tracking and Managing Time

In this lesson, you learn how to track and manage time in Basecamp.

Understanding Time Tracking in Basecamp

Tracking and managing the amount of time spent on a project is a key component of successful project management. If your company bills by the hour, it's critical to track project time. Even if you don't need to track time for billing purposes, knowing the amount of time your team is spending on a project is invaluable information.

Basecamp's Max, Premium, and Plus plans all offer the ability to track time. See Lesson 1, "Getting Started with Basecamp," for more information about Basecamp's account plans.

It's important to note that only people who work for your company can view or enter time in your Basecamp system. The time-tracking feature is hidden from people who work at other companies, such as clients and vendors, even if your account plan includes time tracking. People at *your* company, however, can enter time for anyone involved in a project, even at external companies.

> TIP: **Define a Strategy for Tracking Time**
>
> Before you start entering project time, you need to determine whose time you want to track. For example, if you're a service provider and charge by the hour, you might not want to enter the time clients, partners, or vendors spend on your project, even if they have to-dos assigned to them.

Basecamp offers two ways to enter time. You can do the following:

- Enable time tracking for to-do lists and associate time entries with a to-do list item.
- Enter time independently on the Time page for a specific project.

In general, it's a good idea to track the time your project team spends on each to-do list item and reserve independent time entries only for tasks that don't correspond to a particular to-do.

> NOTE: **Enabling Time Tracking for To-Do Lists**
>
> In Lesson 6, "Entering and Tracking To-Dos," you learned how to enable time tracking when you set up your to-do lists. As a reminder, on the New To-Do List page, select the Allow Us to Track Time Spent on This To-Do List checkbox. If you didn't enable time tracking when you first created your to-do list, you can edit it and select the Enable Time Tracking for This List checkbox.

> TIP: **Basecamp Add-ons Offer Additional Time-Tracking Features**
>
> If you're looking for more sophisticated time-tracking tools, consider one of the many add-on applications that integrate with Basecamp. See Lesson 16, "Integrating Basecamp with Add-ons and Other Applications," for more information.

Entering Time Associated with a To-Do List Item

To enter time for a to-do list item, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the To-Do tab to open the To-Do page, shown in Figure 10.1.

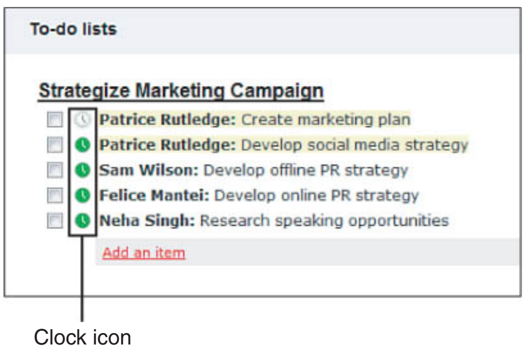


FIGURE 10.1 Click the Clock icon to enter time for a to-do list item.

3. Click the clock icon to the left of the to-do list item for which you want to enter time. The page expands to display time fields (see Figure 10.2).

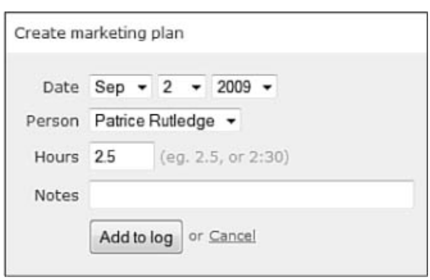


FIGURE 10.2 Enter the time and any related data.

> NOTE: **Basecamp Time Clocks Are Color-Coded**
>
> You can easily tell which to-dos have time associated with them based on the color of their time clock. A white clock indicates that no one has entered time yet. A green clock indicates that time entries already exist.

4. Select the date the work was performed. Today's date appears by default.
5. Select the person who performed the work. Your name appears by default, but you can select the name of another project team member.
6. Enter the Hours worked. You can record partial hours by using numbers or actual time. For example, if someone worked two and a half hours, you could enter 2.5 or 2:30 in the Hours field.
7. Enter any Notes regarding this time.
8. If you've already entered time for this to-do, the total hours appear in a small green box (see Figure 10.3). To view the time log for this to-do item, click the See the Time Log link. This link appears only if you have existing time. Figure 10.4 shows a sample time log.

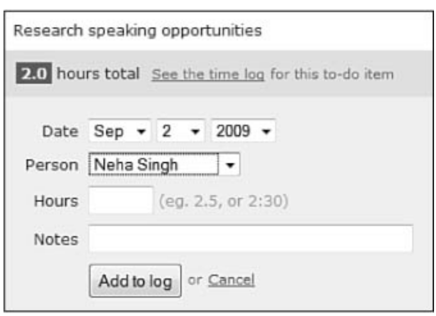


FIGURE 10.3 You can quickly see how much time has already been logged for this to-do.

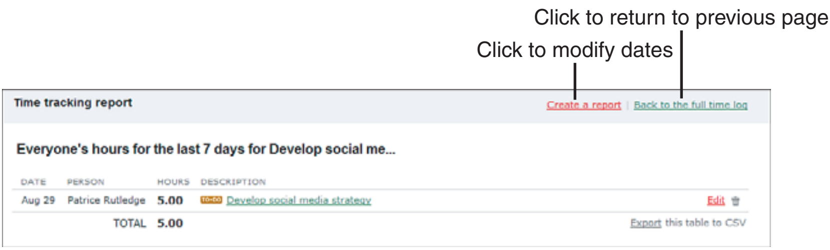


FIGURE 10.4 Viewing a sample time log.

> CAUTION: **Help! My Hours Don't Match**
>
> By default, the time log shows only time entered for the last seven days. If you've entered time beyond a one-week period for this to-do, the hours in the green box won't match the hours on the time log report. To fix this, click the Create a Report link to select new dates for your report. See "Creating a Time Report," later in this lesson, for more information.

9. Click the Add to Log button.

Basecamp tracks the time entry, which you can view on the Time page.

Entering Time on the Time Page

You can enter time that's not associated with a to-do list item on the Time page. To do so, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the Time tab to open the Time page, shown in Figure 10.5.

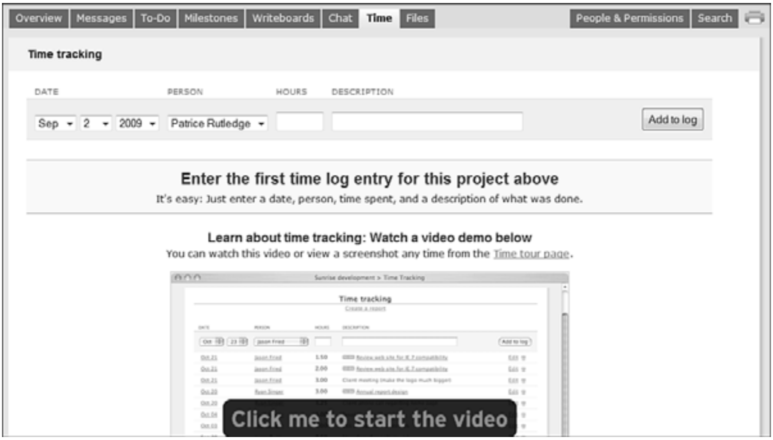


FIGURE 10.5 The Time page as it appears before making any time entries.

3. If this is the first time you're entering times for this project, you can view the optional video demo of Basecamp's time-tracking feature.

4. Select the date the work was performed. Today's date appears by default.

5. Select the person who performed the work. Your name appears by default, but you can select the name of another project team member.

6. Enter the Hours worked. You can record partial hours by using numbers or actual time. For example, if someone worked two and a half hours, you could enter 2.5 or 2:30 in the Hours field.

7. Enter any Description of the work performed.

8. Click the Add to Log button.

Basecamp tracks the time entry, which you can view on this page.

Viewing Time Entries

You can view time entries for a specific project or for all projects.

To view time entries for a specific project, click the Time tab for that project. The Time page opens, shown in Figure 10.6.

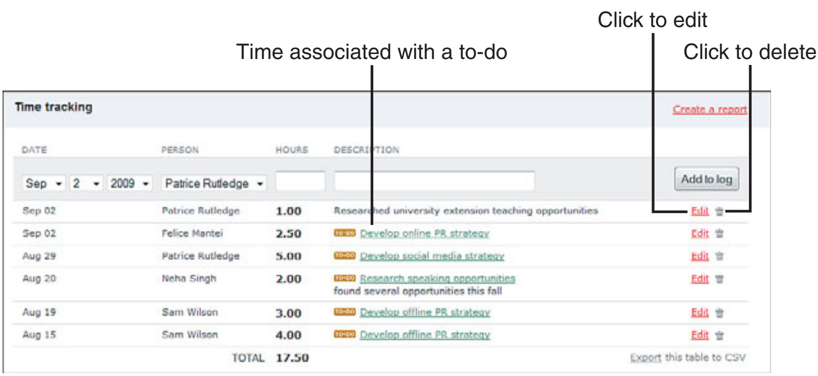


FIGURE 10.6 View time entries for your project in one place.

This page lists all time entries by date. The To-Do icon appears before any time entries associated with a to-do item.

> TIP: **Analyze Your Data for Greater Insight**
>
> To sort and analyze the data on this page, you can create a report or download to Excel. See "Creating a Time Report" and "Exporting Time Entries" later in this lesson for more information.

To view time entries for all your projects, click the Time tab on the Dashboard. This version of the Time page (see Figure 10.7) displays hours by project for the last seven days.

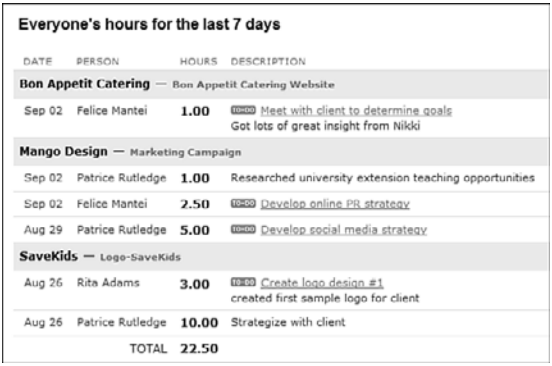


FIGURE 10.7 The Time page as it appears from the Dashboard.

You can't enter time on this page. You must open a specific project to enter associated times.

Editing Time Entries

If you make a mistake when entering times, it's easy to adjust your entries.

To edit a time entry, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the Time tab to open the Time page.
3. Click the Edit link to the right of the entry you want to change (refer to Figure 10.6). The page expands to reopen the time entry fields, shown in Figure 10.8.

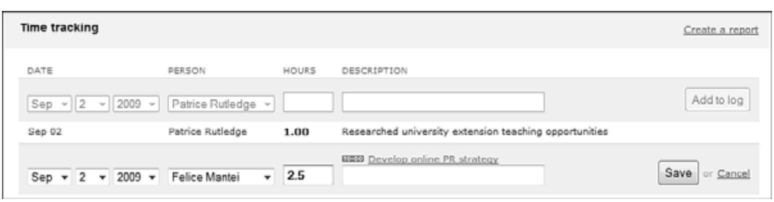


FIGURE 10.8 If you make a mistake, you can revise your time entries.

4. Make any changes to the date, person responsible, hours, or description.

5. Click the Save button.

Your changes appear on the Time page.

Deleting Time Entries

To delete a time entry, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.

2. Click the Time tab to open the Time page.

3. Click the Trash icon to the right of the entry you want to delete (refer to Figure 10.6).

4. Click the OK button in the pop-up box that opens to confirm your deletion.

Basecamp deletes your time entry and removes it from the Time page.

Creating a Time Report

You can create time-tracking reports for a specific project or for all your projects.

To create a report for a specific project, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.

2. Click the Time tab to open the Time page.

3. Click the Create a Report link. The Time page expands to display the Create a Time Report section (see Figure 10.9).

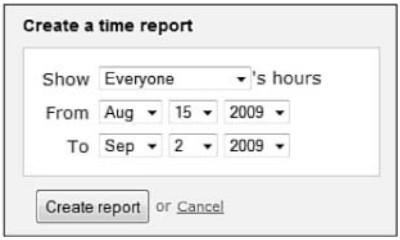
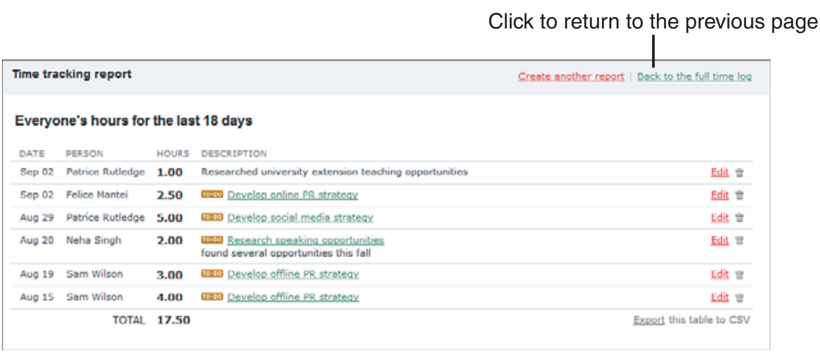


FIGURE 10.9 Create time reports filtering by date and person.

4. Select the person whose time you want to view from the Show drop-down list. Everyone's time appears by default.

5. Select the dates for the report.

6. Click the Create Report button. Figure 10.10 shows the report that appears based on the sample criteria in Figure 10.9.



DATE	PERSON	HOURS	DESCRIPTION	
Sep 02	Patrice Rutledge	1.00	Researched university extension teaching opportunities	Edit
Sep 02	Felice Mantei	2.50	TO-DO Develop online PR strategy	Edit
Aug 29	Patrice Rutledge	5.00	TO-DO Develop social media strategy	Edit
Aug 20	Neha Singh	2.00	TO-DO Research speaking opportunities found several opportunities this fall	Edit
Aug 19	Sam Wilson	3.00	TO-DO Develop offline PR strategy	Edit
Aug 15	Sam Wilson	4.00	TO-DO Develop offline PR strategy	Edit
	TOTAL	17.50		

FIGURE 10.10 A sample Basecamp time report.

From here, you can do the following:

- Create another report by clicking the Create Another Report link.

- Return to the previous screen by clicking the Back to the Full Time Log link.

- Export this report data. See "Exporting Time Entries" later in this lesson for more information.
- Click the Print icon in the upper-right corner to print the report data. Depending on your printer's capabilities, you can print a hard copy, send the report as a fax, or save as a PDF.

NOTE: **You Can't Save Basecamp Reports**

A Basecamp report is essentially a temporary view of the time entries that exist in your system at any given time. You can't save reports in Basecamp itself, but you can save the data externally.

TIP: **Create a Report with Time Entries for All Projects**

If you want to create a report that includes all your Basecamp projects, click the Create a Report link that appears on the Time tab on your Basecamp Dashboard. Follow the steps in this section to create your report.

Exporting Time Entries

If you want to sort and analyze your data in Microsoft Excel or another data analysis tool, it's easy to export your time entries from Basecamp. You can export your time entries to a CSV format by clicking the Export link on the Time page.

PLAIN ENGLISH: **CSV**

CSV is an acronym for a comma-separated values file, a computer file in which fields are separated by commas. This type of file uses the .CSV filename extension for easy identification. The CSV format is commonly used to export data from a database to a spreadsheet application.

The data that you export depends on where you are in the Basecamp system when you click the Export link. For example, you export the following:

- Time entries for all projects if you're on the Time page you access from the Dashboard.
- Time entries for a specific project if you're on the Time page for that particular project.
- Time entries that are part of a report if you're on the Time page that appears after creating a report.

To export time entries, follow these steps:

1. Click the Export link in the lower-right corner of the Time page. A dialog box opens, shown in Figure 10.11.

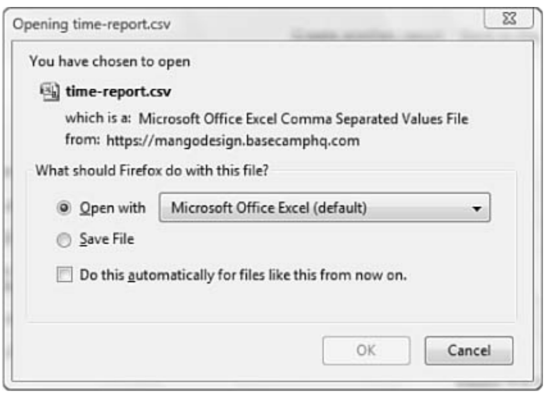


FIGURE 10.11 Select the application in which you want to open your exported data.

2. To open the file with the default application (such as Microsoft Excel), select the Open With option button.
3. To open the file with another application, select the application you prefer from the drop-down list next to the Open With option button. Alternatively, click Other to search for an appropriate application.

4. To save the file, select the Save File option button.
5. Click the OK button to perform the task you selected.

If you want to open your exported Basecamp data in the same application every time, click the Do This Automatically for Files Like This from Now On checkbox.

Figure 10.12 shows a sample time entry export in Microsoft Excel. From here, you can sort, analyze, perform calculations, create charts, and so forth.

A	B	C	D	E
date	person	hours	description	todo
9/2/2009	Patrice Rutledge	1	Researched university extension teaching opportunities	
9/2/2009	Felice Mantei	2.5		Develop online PR strategy
8/29/2009	Patrice Rutledge	5		Develop social media strategy
8/20/2009	Neha Singh	2	found several opportunities this fall	Research speaking opportunities
8/19/2009	Sam Wilson	3		Develop offline PR strategy
8/15/2009	Sam Wilson	4		Develop offline PR strategy

FIGURE 10.12 You can sort, analyze, and format Basecamp data in Microsoft Excel.

Summary

In this lesson, you learned how to track and manage time with Basecamp's time-tracking features. Next, learn about the collaborative power of the Basecamp writeboard.

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LESSON 11

Collaborating with Writeboards

In this lesson, you learn how to collaborate using Basecamp writeboards.

Getting Started with Basecamp Writeboards

In addition to collaborating through its message feature, Basecamp enables collaboration with writeboards. Writeboards are a good choice for brainstorming, getting feedback on drafts, and collaborating on any type of written document. You can create multiple writeboards for each project you manage in Basecamp.

PLAIN ENGLISH: **Writeboard**

A **writeboard** is a web-based tool that enables collaboration on text documents. You can edit the content of a writeboard, maintain versions, compare changes, and comment on writeboard content.

Creating a Writeboard

To create your first writeboard for a project, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the Writeboards tab to open the Writeboards page, shown in Figure 11.1.

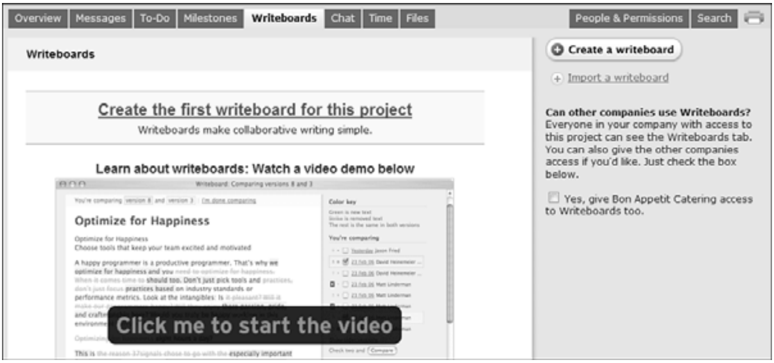

FIGURE 11.1 Basecamp offers assistance when you create your first writeboard.

3. Optionally, view the video demo to take a visual tour of Basecamp's message feature.
4. If you want to give external companies access to your writeboards, select the checkbox in the right column of your screen.
5. Click the Create the First Writeboard for This Project link. The Create a New Writeboard page opens, shown in Figure 11.2.

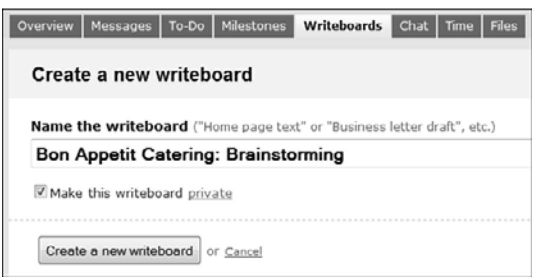

FIGURE 11.2 Enter a meaningful name for your writeboard.

> NOTE: **Where's the Create the First Writeboard for This Project Link?**
>
> The Create the First Writeboard for This Project link appears on the Writeboards page only until you create your first writeboard. After that, the initial content that appears on the page is replaced with details about actual writeboards. Alternatively, you can also create a writeboard by clicking the Create a Writeboard button on the Writeboards page.

6. Enter a writeboard title in the Name the Writeboard text box.
7. If you want to share this writeboard only with users in your own company, click the Make This Writeboard Private checkbox. Users at external companies such as clients or vendors won't be able to see your writeboard. If you haven't given any external companies the permission to access your project, this checkbox isn't available.
8. Click the Create a New Writeboard button. Figure 11.3 shows a sample writeboard before you enter any text.

FIGURE 11.3 Your first writeboard is an empty canvas, ready for you to enter content.

9. Enter your text in the large text box. See "Formatting Writeboard Text" later in this lesson for more information about formatting and content options.
10. Select the checkbox of every person you want to notify by email about the writeboard content you entered. To save time, you can notify everyone at a particular company.
11. Click the Save This Writeboard button.

Basecamp saves your content as the first version of your writeboard (see Figure 11.4).

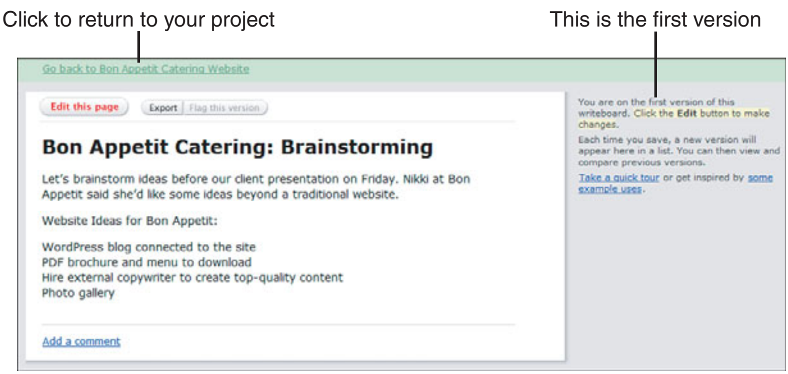

FIGURE 11.4 The first version of a saved writeboard.

> CAUTION: **Be Sure to Save Your Writeboard**
>
> If you don't plan to enter content in your writeboard right away, you still must click the Save This Writeboard button to save your writeboard for future use. If you don't, your writeboard won't be saved.

> TIP: **Import a Writeboard**
>
> If you've created a writeboard in one of 37signals' other applications, such as Backpack (www.backpackit.com) or Writeboard (www.writeboard.com), you can import that writeboard into Basecamp rather than recreate it. To do so, click the Import a Writeboard link on the Writeboards page and enter your external writeboard's URL and password.

Editing a Writeboard

After you enter content in a writeboard, its appearance and the way you access it changes slightly. To edit a writeboard with existing content, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.

> NOTE: **Other Ways to Access Writeboards**
>
> The Writeboards page is the easiest way to access project writeboards, but you can also find writeboard links on the Basecamp Dashboard or a project's Overview page.

2. Click the Writeboards tab to open the Writeboards page, shown in Figure 11.5.

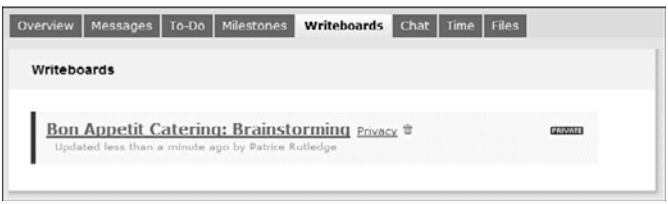

FIGURE 11.5 The Writeboards page displays a list of writeboards for a particular project.

> TIP: **You Can Change Writeboard Privacy Settings**
>
> You can change a writeboard's privacy settings after you create it by clicking the Privacy link next to the writeboard's name on the Writeboards page. In the box that appears, specify whether or not you want other companies to view this writeboard.

3. Click the link of the writeboard you want to open. Figure 11.6 shows a sample writeboard with existing content.

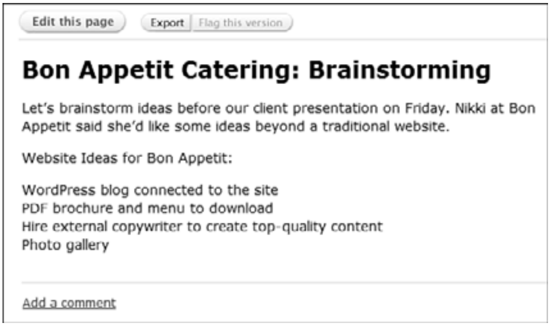

FIGURE 11.6 You can view and edit the existing content of a writeboard.

4. Click the Edit This Page button.

> CAUTION: **Don't Edit the Writeboard at the Same Time as Another User**
>
> If another user is currently editing the writeboard, a warning dialog box opens (see Figure 11.7). To return to the previous page, click the Take Me Back, I'll Try Again Later link. To move forward with editing, click the I Understand the Risk, Let Me Edit Anyway link. To avoid losing any data, it's best not to edit a writeboard that's already in use.

FIGURE 11.7 Basecamp warns you if you try to edit a writeboard at the same time as another user.

5. Enter your changes to the writeboard, such as editing existing content or adding your own content. See "Formatting Writeboard Text" later in this lesson for more information about formatting and content options.

6. If the edits you make are minor, select the Minor Edit, Don't Save a New Version checkbox (see Figure 11.8). The text on the Save button changes to read: Save Over the Current Version. Basecamp overwrites the existing writeboard version with your current content.

7. If the edits you make are major and you want to save them as a new version, don't select the Minor Edit, Don't Save a New Version checkbox. In this case, the Save button text reads: Save as the Newest Version.

FIGURE 11.8 Specify whether or not to save a new version.

PLAIN ENGLISH: **Version**

A **version** refers to a copy of your writeboard content taken at any given point in time. A writeboard can have multiple versions. One of the biggest advantages of creating versions rather than traditional backups is that a version control system enables you to compare changes over time or by a particular user, as well as revert to a previous version if someone makes a mistake.

8. Select the checkbox of every person you want to notify by email about the writeboard content you entered. To save time, you can notify everyone at a particular company.

9. Click the Save button. The exact wording of this button varies depending on your actions in steps 6 and 7.

> TIP: **Create a New Version Only When Necessary**
>
> Creating a new version of your writeboard every time you edit makes it more difficult to track changes in your content, not easier. It's best to save a new version when you make substantial changes or want to differentiate the feedback of multiple users rather than saving a new version every time you fix a typo or make minor edits.

Formatting Writeboard Text

You aren't limited to plain text on your writeboard. You can also format text, insert hyperlinks, and display code and images using Textile just as you can with messages and comments throughout Basecamp. See the section "Formatting Message and Comment Text" in Lesson 8, "Posting and Commenting on Messages," for more information.

> NOTE: **Learn More About Textile**
>
> Visit http://textile.thresholdstate.com to learn more about Textile formatting options.

Table 11.1 lists popular formatting options for writeboard content, as well as samples of how to achieve these effects.

TABLE 11.1 Writeboard Formatting Examples

Formatting	Example
Bold text	*Bold text *
Italicized text	_Italicized text _
Bulleted list	* Bulleted list
Numbered list	# Numbered list
Indented text block	> Indented text block
Big header (H1)	h1. Big header
Normal header (H2)	h2. Normal header
Hyperlinked text	“Basecamp”:http://www.basecamphq.com
Image	!http://www.patricerutledge.com/basecamp.jpg!

TIP: **Format Your Writeboard with HTML**

If you’re familiar with HTML, you can use HTML tags to format your text. For example: bold or <i>italics</i>. Be aware that not all HTML tags work on the writeboard, so you’ll have to experiment if you want to use HTML formatting.

After you save the writeboard, your formatted text, links, and images appear on your writeboard. When you edit the writeboard, your formatting codes appear again.

Including Links to Basecamp Files

Although you can’t formally attach files to a writeboard, there is a workaround you can use to link to files in a writeboard discussion. To do so, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the Files tab to open the Files page.
3. Right-click the file you want to link to on your writeboard (see Figure 11.9).

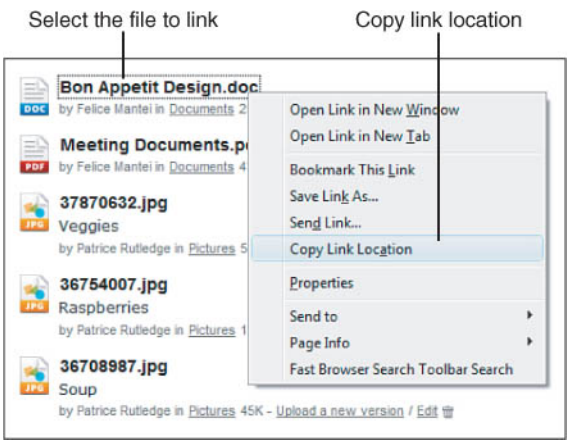

FIGURE 11.9 Copy the link location of your Basecamp file.

4. Select Copy Link Location or Copy Shortcut. The exact text varies based on the browser you use.

5. Click the Writeboards tab and open the writeboard where you want to include the file link.

6. Click the Edit This Page button.

7. Paste the link in the appropriate location by pressing Ctrl +V.

8. Before the link, insert the name of the file surrounded by quotation marks. Follow this with a colon. For example: “Design document”:https://mangodesign.basecamphq.com/projects/3572524/file/34011594/DesignDoc.doc.

9. Be sure to indicate whether or not you want to save this as a new version, and then click the Save button.

Your Basecamp writeboard displays a link to your file (see Figure 11.10). Other team members can click this link from within the writeboard to view the file.

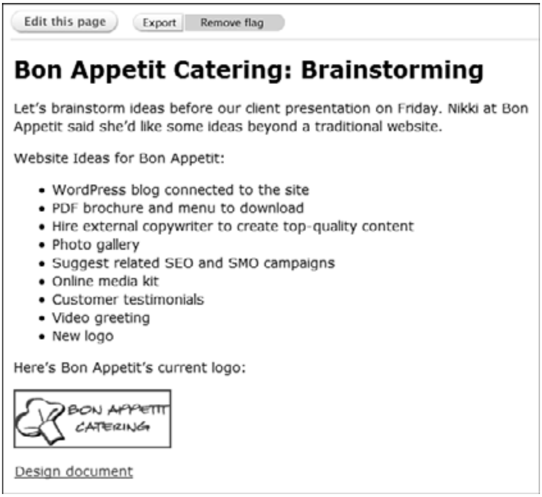

FIGURE 11.10 Click the link to open the file.

> TIP: **Include Links to External Files**
>
> If you store files on your own site, you can also include links to these files. You must include the complete URL, not just the file name. For example, link to http://www.patricerutledge.com/basecamp.jpg, not basecamp.jpg.

Formatting Code

If you plan to enter software code for project team members to review, you need to be sure that it displays correctly. For example, let's say that you enter the following in a message:

```
<b>This text is bolded.</b>
```

When it's posted, it appears as bolded text, without the HTML tags. This is fine if you want bolded text, but what if you want your team members to comment on the actual HTML code? In that case, you can use the HTML tags <code> or <pre> to prevent the code from being rendered in the browser.

For example, you could enter the following:

```
<pre>
<b>This text is bolded.</b>
</pre>
```

For multiline code blocks, use <pre>. For inline code, use <code>.

Making Writeboard Comments

In addition to editing writeboard content itself, you can also attach a comment to a writeboard. This works well when you want to offer feedback or approval on writeboard content rather than edit it.

To make a writeboard comment, follow these steps:

1. Open the writeboard on which you want to comment. You can find writeboard links on the Basecamp Dashboard or on the Overview or Writeboards page for a specific project.

2. Click the Add a Comment link at the bottom of the screen. The page expands to display the Comment text box (see Figure 11.11).

FIGURE 11.11 Enter your feedback or approval on writeboard content as a comment.

3. Enter your comment in the Comment text box. See “Formatting Writeboard Text” earlier in this lesson for more information about text formatting options.
4. Select the checkbox before the names of any people you want to notify by email about your comment. To save time, you can choose to notify everyone at a particular company.
5. Click the Add This Comment button.

Figure 11.12 shows a sample comment.

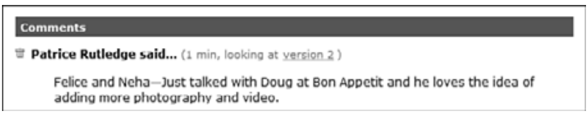

FIGURE 11.12 Comments appear at the end of your writeboard screen.

Basecamp indicates the date the comment was made, as well as the writeboard version the comment relates to. When a comment is new, Basecamp indicates how long ago it was made, such as < 1 min ago. By the next day, this is replaced with a date, such as 08 Sep 09.

Click the Trash icon to the left of a posted comment to delete it. Click View Comment History to view trashed comments. You can also restore comments from this page.

Viewing and Comparing Writeboard Versions

As soon as you make changes to the initial writeboard content and save it, Basecamp displays it as the first version on the main writeboard page (refer to Figure 11.4).

After you save more than one version of a writeboard, the right column changes to list your versions (see Figure 11.13).

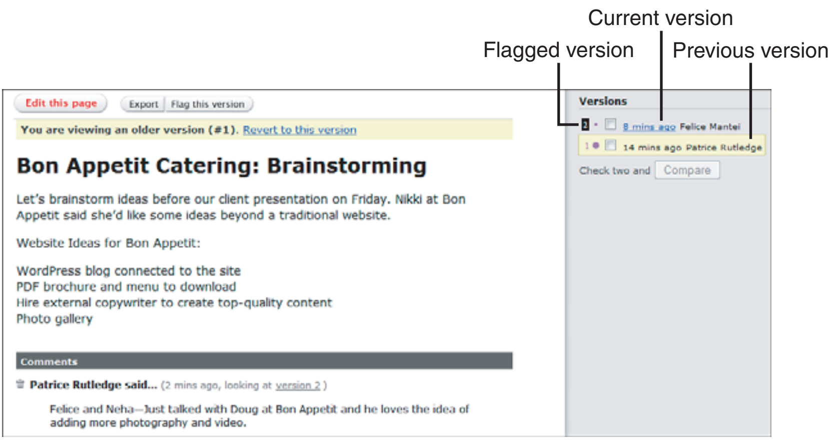

FIGURE 11.13 Basecamp lists all your writeboard versions.

The Versions section lists every writeboard version you create, including the date it was created and the name of the person who edited that version.

To view a specific version, click its date link. Figure 11.14 shows a previous version of a writeboard, which is clearly marked to avoid confusion.

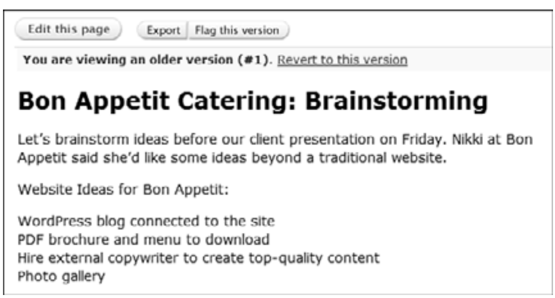

FIGURE 11.14 Viewing a previous version of the writeboard.

If you made a mistake in your latest writeboard version, you can click the Revert to This Version link to make the version you're viewing the latest version. Basecamp asks you to confirm the reversion, which is permanent. Doing this will erase the content of your latest version.

To compare two writeboard versions, select their checkboxes in the right column and click the Compare button. Basecamp displays the compare screen (see Figure 11.15), highlighting the changes in color for easy viewing.

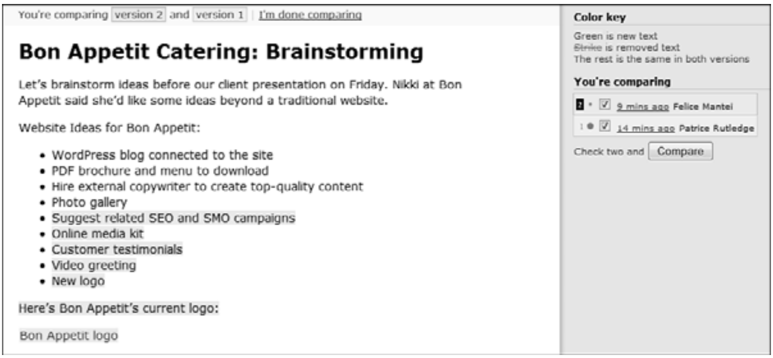

FIGURE 11.15 Compare writeboard versions to determine the changes made.

When you're finished comparing versions, click the I'm Done Comparing link to return to the latest version.

You can quickly compare the two most recent versions by clicking the Quick Compare link in the right column.

> TIP: **Flag a Version for Easier Identification**
>
> If you have many versions of your writeboard, it can become difficult to distinguish between them. To make a specific version stand out, open it and click the Flag This Version button. This places a black box around the version number. Flagging is useful if you want someone to view a specific version or if a specific version contains extensive changes.

Exporting a Writeboard

You can export the content of your writeboard as a text file or HTML file.

To do so, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the Writeboards tab to open the Writeboards page.
3. Click the link of the writeboard you want to open.
4. Select the version you want to export, if not the latest version.
5. Click the Export button. The writeboard expands to display the Export This Version to a File section, shown in Figure 11.16.

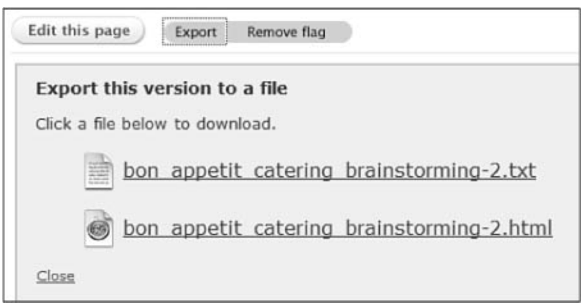

FIGURE 11.16 Choose to export to a text file or HTML file.

6. Click the link of the file type you want to export, either the text file or the HTML file.

> CAUTION: **Text Files Don't Include Images or Links**
> If your writeboard contains images or links, you should choose the HTML option. You will lose links and images in a text file.

7. In the dialog box that opens, indicate whether you want to open or save the file and click the OK button. The appearance of the dialog box varies based on your browser and operating system.

Deleting a Writeboard

If you no longer need a writeboard and want to save space, you can delete it. Exporting your writeboard content is a good idea if you want to retain the contents for any reason.

To delete a writeboard, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the Writeboards tab to open the Writeboards page, shown in Figure 11.17.

FIGURE 11.17 Delete writeboards you no longer need.

3. Click the Trash icon to the right of the writeboard you want to delete.
4. Click the OK button in the confirmation dialog box to confirm that you want to delete the writeboard.

Basecamp permanently deletes the writeboard.

Summary

In this lesson, you learned how to collaborate using Basecamp's writeboard feature. Next, learn how to add chat functionality by integrating your Campfire account with Basecamp.

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LESSON 12

Working with Chat Functionality

In this lesson, you learn how to participate in group chats on Basecamp by integrating with the Campfire real-time chat application.

Understanding Basecamp's Chat Functionality

Basecamp enables you to hold group chats with your project team members using Campfire (www.campfirenow.com), the real-time chat application developed by Basecamp's parent company, 37signals.

Basecamp requires a Campfire account to use the chat feature, but only one person needs to sign up for Campfire, not each individual project team member. It's recommended that this person is the account owner or administrator who has access to all your Basecamp projects.

Anyone who has access to your Basecamp system can participate in chats and upload files, but individuals from external companies aren't able to view, search, or delete chat transcripts. You can also invite individuals who aren't part of your Basecamp project team to participate in a specific chat. See "Providing Guest Access to Your Chat Room" later in this lesson for more details.

> TIP: **Choosing Between Messages, Chat, or Writeboards**
>
> Basecamp offers several ways to communicate and interact with project team members. It's a judgment call on the part of the project manager to determine which communication method works best in which situation. In general, chats are good for informal discussions among team members, messages are designed for important communications you want to maintain as part of your project record, and writeboards work well for document collaboration.

Understanding Campfire Account Types

Campfire (www.campfirenow.com) offers several account plans based on how you plan to implement chat for your projects.

Table 12.1 shows the differences between the available Campfire account plans.

TABLE 12.1 Campfire Account Plans

Plan	Chatters	Storage	Security	Monthly Price
Max	100	25GB	Enhanced	$99
Premium	60	10GB	Enhanced	$49
Plus	25	3GB	Enhanced	$24
Basic	12	1GB	Standard	$12
Free	4	10MB	Standard	None

The plans vary based on the following features:

- **Number of chatters**. This refers to the number of people who can chat on your system at one time. This number includes people chatting in all your rooms across projects, not just in one room.
- **Amount of storage**. All Campfire plans enable you to upload and share files, with varying amounts of storage space available to you. Consider the size of the documents, pictures, audio, and video that you might upload to help determine which account plan is best for your needs.

- **Security**. Campfire accounts with enhanced security offer SSL 128-bit encryption for added privacy and protection. Accounts that offer standard security use passwords for your protection.

> PLAIN ENGLISH: **SSL Encryption**
>
> **SSL** stands for Secure Socket Layer, a cryptographic protocol that offers security for data communications over the Internet. In other words, SSL encryption keeps your Campfire chats safe from security breaches. E-commerce sites and banks also use SSL encryption to ensure the safety and privacy of their customers' credit cards and personal data.

Campfire's Max, Premium, Plus, and Basic accounts also include email tech support, no advertising, and a custom lobby logo (your company logo displayed on your Campfire home page).

> NOTE: **Basecamp Max Plan Subscribers Receive Campfire Free**
>
> Remember that if you have Basecamp's Max plan, you receive a free Campfire Premium plan (a $49 per month value). To receive this offer, sign up for a free Campfire account and then send your Basecamp and Campfire URLs to support@campfirenow.com, requesting the upgrade.

Signing Up for a Campfire Account

Signing up for a Campfire account is a simple, straightforward task. If you choose a paid plan, you receive your first 30 days free as a trial.

Figure 12.1 shows the screen that greets you the first time you visit Campfire (www.campfirenow.com).

FIGURE 12.1 You can quickly sign up for a trial account from Campfire's home page.

To sign up for a Campfire account, follow these steps:

1. Click the Pricing & Sign Up link on the top navigation menu of Campfire's home page.

2. Click the Sign Up button for the plan you prefer: Max, Premium, Plus, or Basic (see Figure 12.2). Alternatively, click the Free Plan link to sign up for a plan with limited features at no cost. The Sign Up page opens, shown in Figure 12.3.

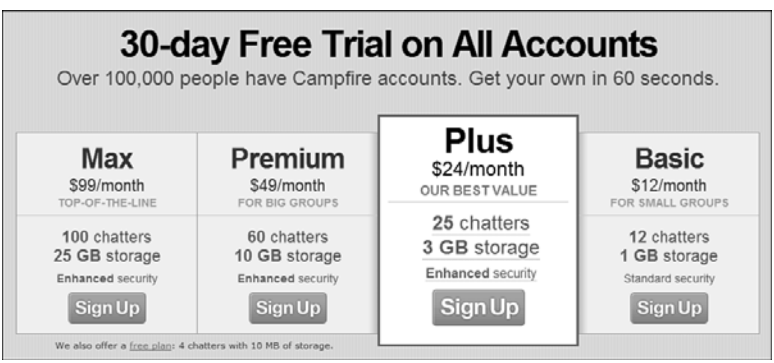


FIGURE 12.2 Choose the Campfire plan that best suits your business needs.

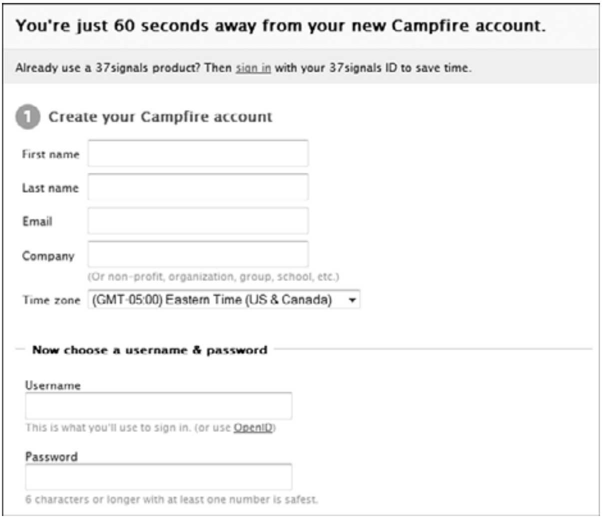


FIGURE 12.3 Enter Campfire account information that you'll use to connect with Basecamp.

> NOTE: **Consider a Campfire Free Account**
>
> If you want to try out Campfire without entering your credit card information, click the Free Plan link below the boxes describing Campfire's paid plans.

3. If you already have a 37signals ID, click the Sign In link to sign up for Campfire using this ID. Otherwise, enter your name, email address, company, and time zone in the Create Your Campfire Account section.
4. Choose and enter a Username and Password for your account. Be sure to choose a strong password, preferably one that contains both letters and numbers.
5. Enter the URL of the Campfire site address you want to use. For example, if your company name is Mango Design, you might want to choose http://mangodesign.campfirenow.com. Your site address can include only letters and numbers. Spaces aren't allowed. If you enter an address that's already taken, Campfire prompts you to enter a new name.

6. Enter your credit card data in the Enter Your Billing Information section. You can pay with a Visa, MasterCard, or American Express credit card. Remember that your card won't be billed until your 30-day trial ends. If you cancel your account before the 30 days, you won't be charged. The free account doesn't require a credit card.
7. If you have a coupon or discount code, click the Got a Coupon Code? link and enter your code.
8. Review Campfire's terms of service, privacy policy, and refund policy by clicking the appropriate links.
9. Click the Create My Account button. Campfire transfers you to your login page.

From here, you can log in to Campfire and use it directly or you can return to Basecamp to set up Campfire to work within your Basecamp system.

Configuring Basecamp to Work with Campfire

Now that you have a Campfire account, you can set up Basecamp's chat functionality. To do so, follow these steps:

1. From the Basecamp Dashboard, click the Settings tab.
2. Click the Chat Settings link to open the Chat Settings page, shown in Figure 12.4.
3. Verify that the Yes option button is selected to enable chat. This should be selected by default.

> TIP: **Hide the Chat Tab if You Don't Plan to Use Chat**
>
> Click the No option button if you don't plan to use the chat feature. This hides the Chat tabs on your project pages.

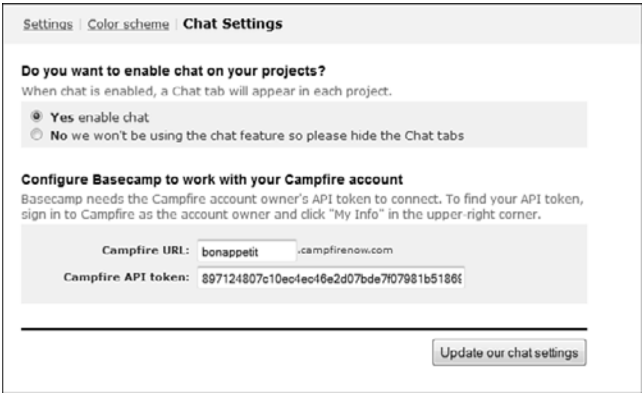


FIGURE 12.4 You must enable your Basecamp account to work with Campfire.

4. Enter the Campfire URL you specified when you signed up for Campfire, such as mangodesign.campfirenow.com.
5. Enter your Campfire API Token. You can find this information by logging in to Campfire as an account owner and clicking the My Info link that appears in the upper-right corner of the screen.
6. Click the Update Our Chat Settings button.

Basecamp is now configured to work with your Campfire account. The Chat tab appears for each project in your Basecamp system.

Participating in Group Chats

To access the chat room for a project, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list on the right side of the screen.
2. Click the Chat tab to open the chat room, shown in Figure 12.5.

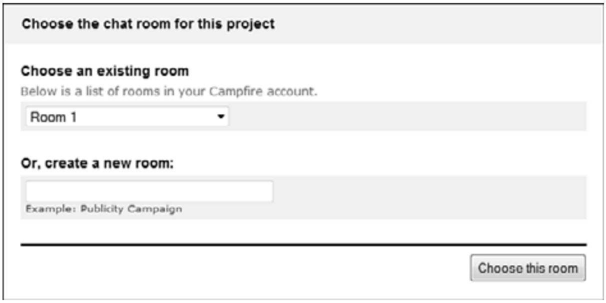


FIGURE 12.5 Set up a room the first time you enter chat for a project.

NOTE: **Chat Room Prompts for New Users**

If you haven't already configured Basecamp to work with Campfire on the Chat Settings page, you're prompted to do so. Click the setup link in the chat room, configure Campfire, and return to the chat room to begin your chat.

CAUTION: **Help! I Can't Find the Chat Tab**

There are several reasons why the Chat tab might not appear on your screen. Remember that this tab is only available when you're in a project, not from the Dashboard. Also, verify that chat functionality isn't disabled on the Chat Settings page.

3. Select a chat room to enter from the drop-down list. Basecamp lists Room 1 by default, but you can create a new room in the text box. You can attach only one room to a project, however. If you've already attached a room to your project, this screen doesn't appear.

> TIP: **Create a Name That Clearly Identifies Your Room**
>
> Rooms identified by number can become confusing if you have chat rooms for each project. To make it easier to identify your rooms, create room names that match your project names.

4. Click the Choose This Room button to enter the chat room. Figure 12.6 shows the entry to the chat room. Basecamp lets you know whether any other chatters are currently in the room. If not, the room's status is unoccupied.

FIGURE 12.6 See who else is already in the chat room.

5. Click the link for the name of the room to open the chat room. Figure 12.7 shows a sample chat room the first time you enter it. Figure 12.8 shows a sample chat room that's in progress.

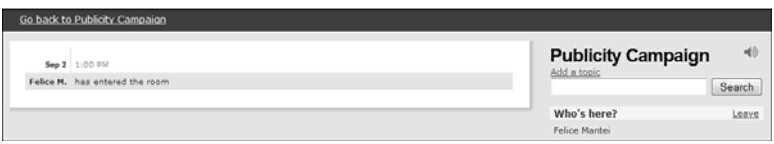


FIGURE 12.7 It's easy to start chatting with project team members.

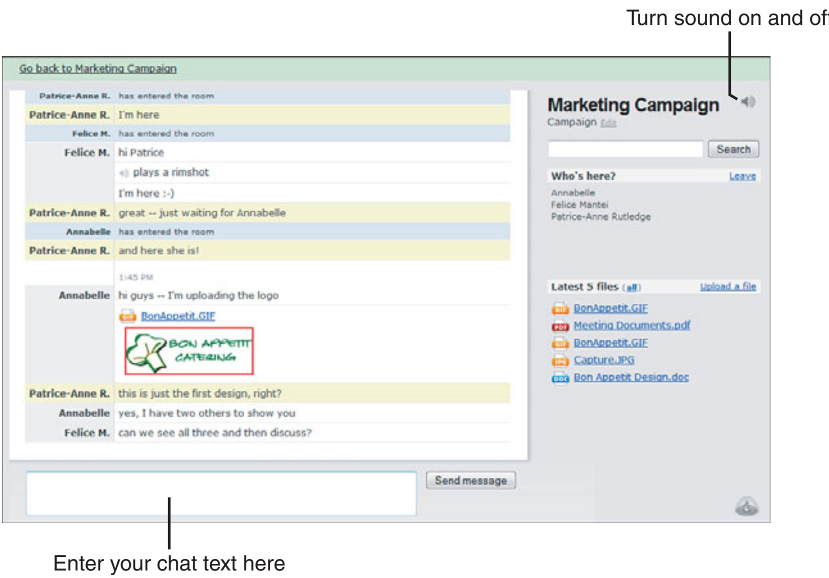


FIGURE 12.8 In addition to text chats, you can upload files and add sound effects in your chat room.

In a chat room, you can do the following:

- Enter a message in the text box and click the Send Message button to post it.
- Turn sounds on and off in the room by clicking the Sound icon.
- Add a new discussion topic by clicking the Add a Topic link.
- Edit the room's discussion topic by clicking the Edit link. To remove the topic, delete the content of the text box and click Save.
- View who is in the chat room in the Who's Here? list.
- Search for words in chat text in the Search text box.
- Leave the chat room by clicking the Leave link.
- Upload a file by clicking the Upload a File link.

> TIP: **Have Some Fun with Sounds Effects**
>
> If you'd like to have some fun with your chatters, you can play sound effects in your chat room. Try entering one of the following: /play crickets, /play rimshot, or /play trombone. Remember, though: A little goes a long way with sound effects.

The remainder of this section focuses on common tasks you perform in the chat room.

Uploading a File

Although you can upload files in other parts of Basecamp, sometimes it's more convenient to include files as part of your chat conversations.

To upload a file, follow these steps:

1. Click the Upload a File link.
2. Click the Browse button to select one or more files from your computer. Depending on your operating system, this button could be called the Choose File button instead. Each file must be less than 10MB and counts toward the file storage limit of your Campfire account plan.
3. Click the Upload button to upload the file.

The link for the file you upload appears in your chat room, as well as on the right side of your screen (see Figure 12.9).

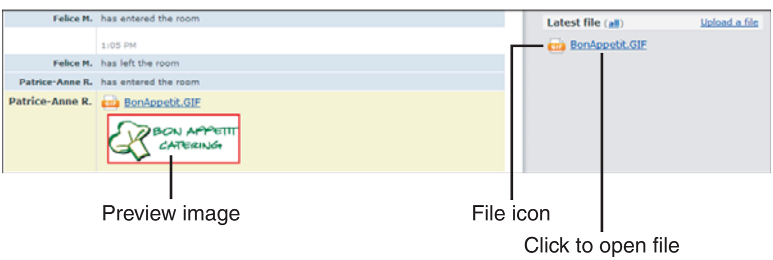


FIGURE 12.9 Upload files you're discussing in your chat room.

Each file link is preceded by a file icon to make it easier to identify the file type. If you upload an image, the image previews directly in the chat window.

To open the file, click the link. Depending on the file type, Basecamp might open the file directly or prompt you to pick an associated application.

Viewing Files and Transcripts

Basecamp creates daily transcripts of your chats that you can review at a later date.

To view chat files and transcripts in one place, click the All link next to the list of uploaded files in the chat room. The Files, Transcripts & Search page opens, shown in Figure 12.10.

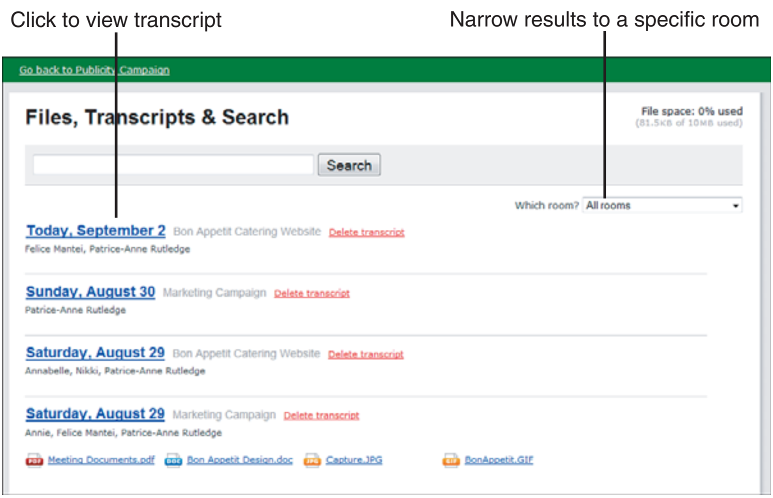


FIGURE 12.10 Select a transcript to view.

Basecamp displays a list of all transcripts by date and room name. Links to any files you uploaded appear below the transcript link.

> TIP: **Specify Which Room's Transcripts to Display**
> If you have a lot of transcripts, narrow what appears on your screen by selecting a specific room from the Which Room? drop-down list.

To view a specific transcript, click its date link. Figure 12.11 shows a sample transcript.

FIGURE 12.11 View transcripts of previous chats.

Deleting a Transcript

To delete a chat transcript, follow these steps:

1. In the main chat window, click the All link next to the list of uploaded files.
2. Click the Delete Transcript link to the right of the transcript you want to delete.
3. Click OK on the confirmation dialog box that opens.

Basecamp deletes the transcript permanently.

Deleting an Uploaded File

Because there is a limit to the number of files you store in Basecamp, there will be times that you want to delete files you no longer need. To delete a file you uploaded in chat, follow these steps:

1. In the main chat window, click the All link next to the list of uploaded files.
2. On the Files, Transcripts & Search page, mouse over the file you want to delete. The Trash icon appears (see Figure 12.12).

FIGURE 12.12 Mouse over the file name to view the Trash icon.

3. Click the Trash icon.
4. Click OK on the confirmation dialog box that opens.

Basecamp permanently deletes the file.

Searching Chat Transcripts

If you use chat frequently, it can become difficult to find the details of a specific conversation over time. For example, you might remember talking about a particular aspect of a client project several weeks ago, but you're not sure exactly when the chat took place or who said what.

There are two ways to search for chat content—in the chat room or on the Files, Transcripts & Search page.

To search for chat content, follow these steps:

1. Enter search text in the text box to the left of the Search button in either the chat room or on the Files, Transcripts & Search page.
2. Click the Search button to open the Search results page, shown in Figure 12.13.

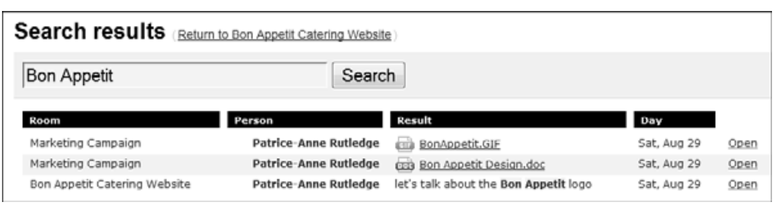


FIGURE 12.13 Search for specific chat room discussions.

3. Review the search results and click the Open link next to the result that best matches what you're searching for. The transcript opens to the specific location where your search term is mentioned.

Providing Guest Access to Your Chat Room

At times, you might want to invite someone who isn't part of your project team to participate in a chat. For example, not every person at a vendor, partner, or client might have, or need, an account on your Basecamp system. If it doesn't make sense to create an account for this person, consider providing guest access to your chat room.

To do so, follow these steps:

1. Log into your Campfire account (not Basecamp).
2. Click the link of the chat room to which you want to invite your guest.
3. Verify that guest access is on (see Figure 12.14). If it isn't, click the Turn It On link.

FIGURE 12.14 Turn on guest access in Campfire.

4. Notify your guest of the URL to temporarily enter the chat room, such as http://mangodesign.campfirenow.com/76e46. This URL is unique to this room. If you turn off guest access and turn it back on again, Campfire gives your room a new URL.

Your guest just needs to enter a name and click the Sign In button to access your chat room. Like project team members at external companies, guests can't view, search, or delete chat transcripts.

Guest URLs shouldn't be shared with anyone other than invited guests. If an unauthorized person does enter your chat room, however, mouse over that person's name in the Who's Here? List and click the Kick link (see Figure 12.15).

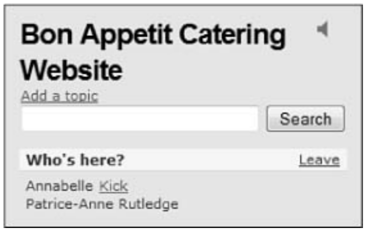


FIGURE 12.15 Kick out anyone you don't want in your room.

Basecamp notifies users you kick out of your chat room, so you probably want to kick out only those people who are accessing your chat room without your permission, rather than kicking out your vendors, or worse, your clients.

Summary

In this lesson, you learned how to hold group chats in Basecamp by integrating with the Campfire application. Next, learn how to view and analyze project activity on the Dashboard.

LESSON 13

Viewing Project Activity on the Dashboard

In this lesson, you learn how to use the Dashboard to get a quick overview of the latest activity across your projects.

Viewing the Dashboard as a Project Owner or Administrator

When you first sign up for a Basecamp account, the Basecamp Dashboard (see Figure 13.1) is a welcome screen that helps you get started with setting up your system and your first project.

FIGURE 13.1 Initially, the Dashboard functions as a welcome screen.

As soon as your Basecamp account has projects and project activity, the Dashboard begins to serve its true purpose—as the place to get a quick overview of your current project activity and deadlines. As the account owner or administrator, you can view the latest activity across your projects on the Dashboard.

Figure 13.2 shows the Dashboard of a company with multiple projects in progress.

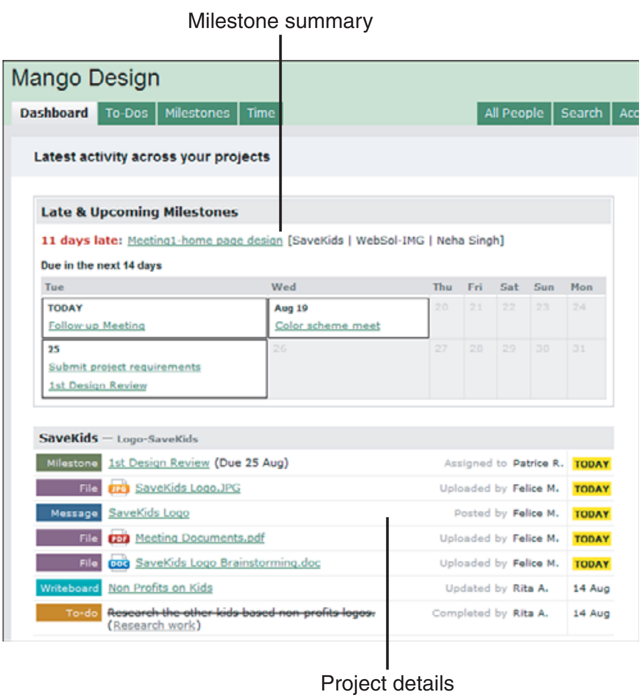


FIGURE 13.2 The Dashboard helps you track activity on multiple projects.

> TIP: **Get a Quick Overview of To-Do, Milestone, and Time Activity**
>
> Click the To-Dos, Milestones, and Time tabs to view more detailed project activity related to these tasks. See the lessons that cover to-dos, milestones, and time tracking for more information about the content on these pages.

Viewing Milestone Activity

The top of the Dashboard displays late milestones, as well as a calendar that shows you what's due in the next 14 days.

> TIP: **View Milestone Activity Beyond 14 Days**
>
> To view milestone activity beyond the 14-day calendar that appears on the Dashboard, click the Milestones tab.

To view details about the milestone, click its link. A pop-up box opens, shown in Figure 13.3.

FIGURE 13.3 This pop-up provides easy access to your milestones.

Mouse over the milestone title to view additional options. From this pop-up box, you can do the following:

- Delete the milestone by clicking the Trash icon.
- Edit the milestone by clicking the Edit link.
- Add a comment by clicking the Comment icon.
- Mark the milestone as complete by clicking the checkbox.
- View any related to-dos by clicking their links.

- View all project's milestones by clicking the See All Milestones for This Project link.
- Close the pop-up box by clicking the Close link.

See Lesson 5, "Entering and Tracking Milestones," for more information about milestones.

Viewing Project Activity

The lower part of the Dashboard lists your latest activity by project (see Figure 13.4).

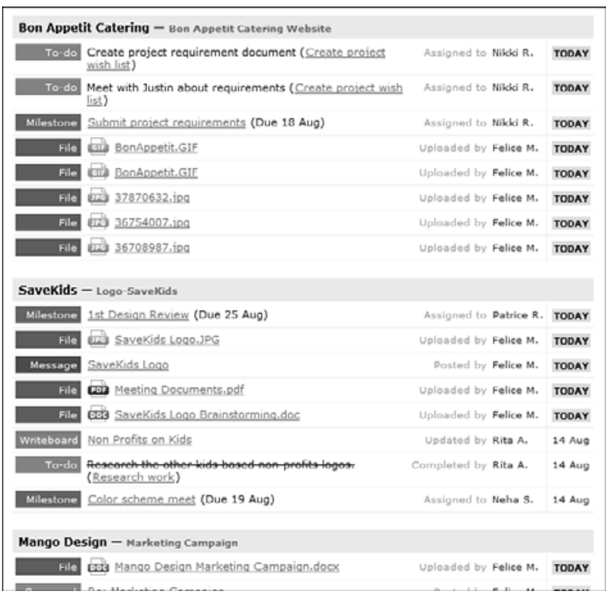


FIGURE 13.4 See a detailed list of activity by project.

For each project, you can view the following:

- An icon depicting the type of project activity, such as message, comment, file, milestone, to-do, writeboard, and so forth. Each activity type is color-coded for easy reference. For example, messages are colored dark blue and files are purple. Private files are colored red.
- A link that opens the project activity, such as a message or comment, or opens an actual file. Files include an icon that identifies their file type.
- The name of the associated project team member. For example, to-dos and milestones list the person assigned this task. Files list the person who uploaded the file.
- The date of the activity. The bright yellow Today icon alerts you to the latest project updates.

NOTE: **Enhance Reporting and Analysis with Third-Party Add-ons**

The Basecamp Dashboard offers a great way to get a quick overview of your project activity, but sometimes you need to analyze your data in more detail. See Lesson 16, "Integrating Basecamp with Add-ons and Other Applications," for more information about add-ons that offer more analytical options.

Accessing Your Projects from the Dashboard

The right side of your Dashboard includes links to all of your active projects, listed under their associated company, shown in Figure 13.5.

For example, this section could include internal projects listed under your own company or client projects listed under the client's name.

Any projects on hold are listed below your active projects, but the related project data doesn't appear in the detail column to the left.

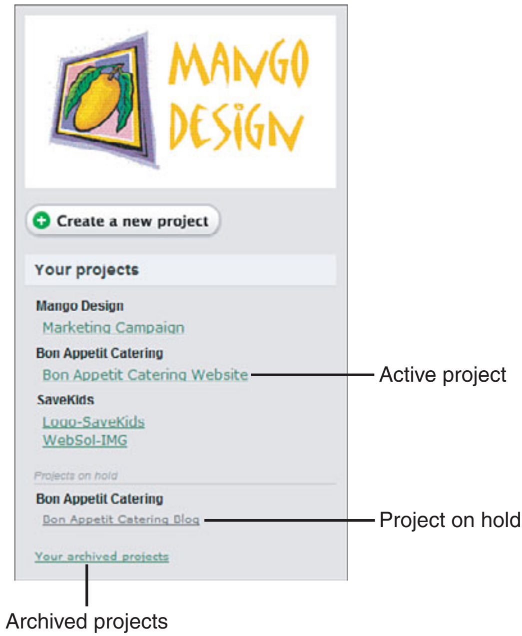


FIGURE 13.5 View projects by company.

If you have archived projects, you can click the Your Archived Projects link to view them. Remember, archived projects are frozen. You can view them, but not edit them.

Modifying the Dashboard

The Dashboard offers a fixed view of your project activity that you can't customize. If you want to remove an item from the Dashboard, you must delete it permanently.

If you want to remove the activities of a specific project from your Dashboard, you can do the following:

- **Archive the project.** You can't add or update this project until you reactivate it.

- **Place the project on hold.** This removes the project's activities from the Dashboard.
- **Delete the project.** This permanently removes the project from your Basecamp system.

See Lesson 4, "Working with Projects," for more information about modifying a project's status.

Viewing the Dashboard as a Basecamp User

Basecamp users, defined as anyone who's not an account owner or administrator, have a much more simplified view of the Dashboard that matches their more limited permissions. Figure 13.6 shows the same Dashboard as Figure 13.2, but from the perspective of a user (in this case, a client).

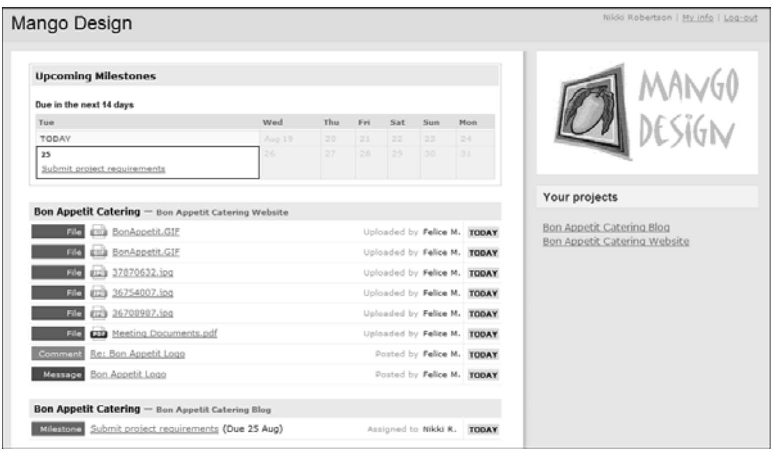


FIGURE 13.6 Basecamp users have a more streamlined view of the Dashboard.

This Dashboard view contains no tabs and no Create a New Project button, but does include all other relevant project data and links to the projects this user has permission to access.

If Basecamp users log on to the system before being assigned to a project, the Dashboard informs them of this and displays sample project data instead.

Summary

In this lesson, you learned how to view your latest project activity on the Basecamp Dashboard. Next, explore the many ways RSS feeds can also keep you up-to-date on your Basecamp project activity.

LESSON 14

Working with RSS Feeds

In this lesson, you learn how to use RSS feeds to stay up-to-date on your Basecamp project activity.

Understanding RSS Feeds

RSS feeds help you stay on top of your project activity without reading multiple emails or logging in to Basecamp just to see if there's anything new. A feed provides a list of your most recent project activity, including messages, comments, to-dos, milestones, file uploads, and writeboard updates.

PLAIN ENGLISH: **RSS**

RSS stands for Really Simple Syndication, a popular format for web feeds. Content publishers can syndicate their content with a feed, making it available for users to subscribe to it and view with feed reader applications (also called newsreaders, aggregators, or RSS readers). Feeds for blog content are most common, but you can also create a feed for web content such as the content on Basecamp. The standard feed icon is a small orange square with white radio waves, letting you know that the content is available via feed for your subscription.

Basecamp offers a global feed that lists activity on all your projects, as well as a project-specific feed for each of your projects. Each feed is unique to an individual Basecamp user, with content based on that user's project permissions.

Selecting a Feed Reader

Because your Basecamp feed contains private project information that you probably don't care to share with the world, you need a feed reader that supports authentication. This ensures that only you can view your feed.

> PLAIN ENGLISH: **Authentication**
>
> **Authentication** is the process of identifying a user through a username and password.

Many popular feed readers don't support authentication, but one that does is NewsGator (www.newsgator.com). NewsGator products include FeedDemon for Windows and NetNewsWire for the Mac. Both products are free.

> TIP: **You Can View Your Feed with Any Feed Reader via a Proxy**
>
> If you really want to use a feed reader that doesn't support authentication, such as Google Reader, there is an alternative. FreeMyFeed (www.freemyfeed.com) is a service that acts as a proxy, or go-between, enabling you to use other feed readers while keeping your confidential username and password safe.

Subscribing to Your Global RSS Feed

From the Basecamp Dashboard, you can subscribe to a global RSS feed that includes all your projects. To do so, click the Global RSS Feed link at the bottom of the page (see Figure 14.1).

The Subscribe to Your RSS Feed page opens, shown in Figure 14.2.

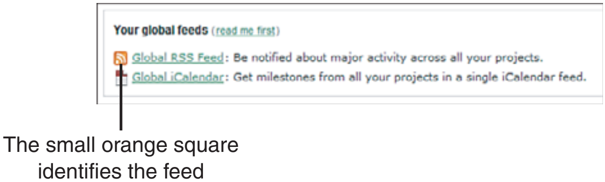


FIGURE 14.1 Subscribe to a global feed that includes data from all your Basecamp projects.

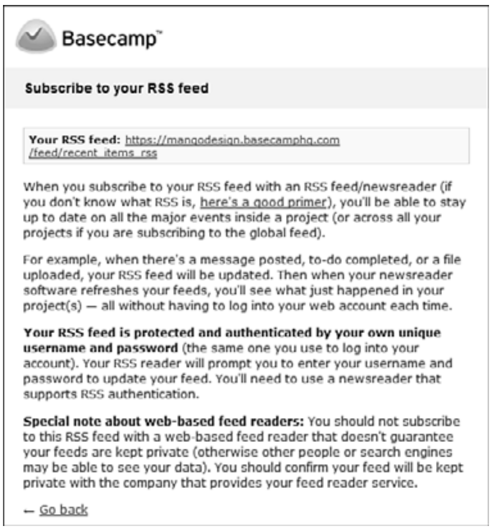


FIGURE 14.2 If you're new to feeds, be sure to read the important information on this page.

From this page, you can do the following:

- Click your RSS feed's link to preview its contents. Your browser prompts you to enter your Basecamp username and password. Depending on the type of browser you use, this could be in a browser page or dialog box.
- Copy your RSS feed link and subscribe to it using your preferred feed reader. See "Selecting a Feed Reader" earlier in this lesson for more information.

> CAUTION: **I Get an Error Message When I Try to Subscribe to My Feed**
>
> Remember that Basecamp feeds require feed readers that support authentication. Many popular feed readers don't currently offer this feature. Instead, try using one of the options described in "Selecting a Feed Reader" earlier in this lesson.

Subscribing to a Project's RSS Feed

To subscribe to a project's RSS feed, follow these steps:

1. On the Basecamp Dashboard, select the project you want to open from the Your Projects list.
2. On the Overview page, click the Project RSS Feed link on the right side of the screen (see Figure 14.3). The Subscribe to Your RSS Feed page opens (refer to Figure 14.2).

From here, follow the process described in "Subscribing to Your Global RSS Feed" earlier in this lesson.

FIGURE 14.3 Subscribe to an RSS feed that's specific to a particular project.

Viewing Your Feed

Figure 14.4 shows a sample Basecamp feed.

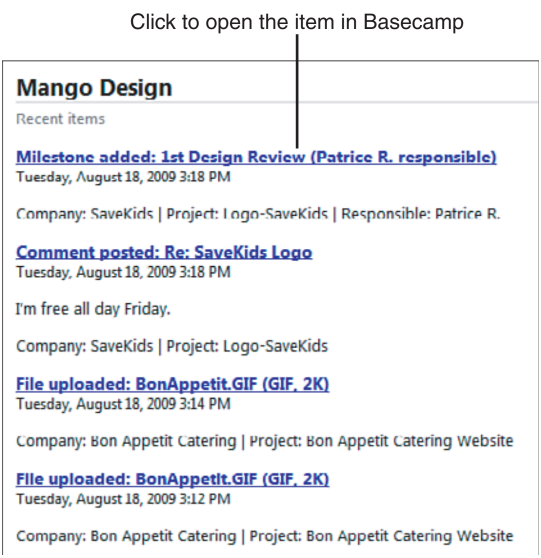


FIGURE 14.4 Keep apprised of your Basecamp project activity with a feed.

The feed lists the title of each project update as a clickable link. Below that, you can view additional information, such as the date of the update, the associated company, and the project name. Click the link to open the item in Basecamp.

Depending on the feed reader you use, your feed's appearance might vary from this example.

Summary

In this lesson, you learned how to use RSS feeds to stay up-to-date on your Basecamp project activity. Next, learn how to more effectively manage your Basecamp account.

LESSON 15

Managing Your Account

In this lesson, you learn how to perform common account management tasks.

Understanding Account Management Options

On the Account page, shown in Figure 15.1, you can change your Basecamp URL, upgrade or downgrade account plans, change your credit card, change the account owner, or cancel your account. You must be the account owner to access this page and make these changes.

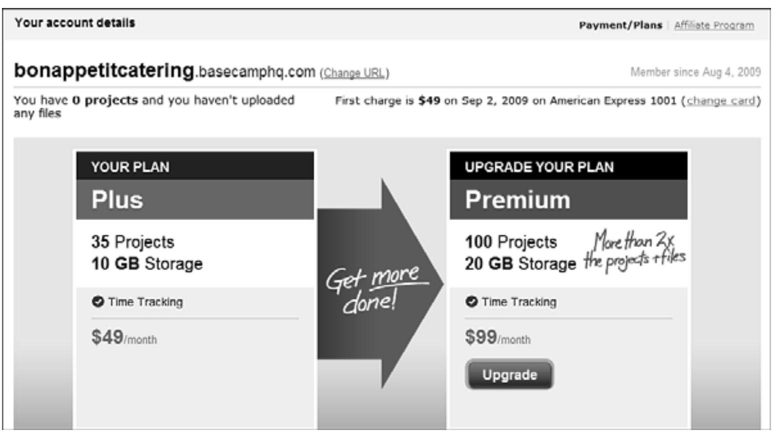


FIGURE 15.1 Manage your account options on the Account page.

To open the Account page, click the Account (Upgrade/Billing) tab. The remainder of this lesson covers the options that you'll find on this page.

Changing Your Basecamp URL

To upgrade your Basecamp account, follow these steps:

1. Click the Change URL link on the Account page to open the Change Your Account URL page (see Figure 15.2).

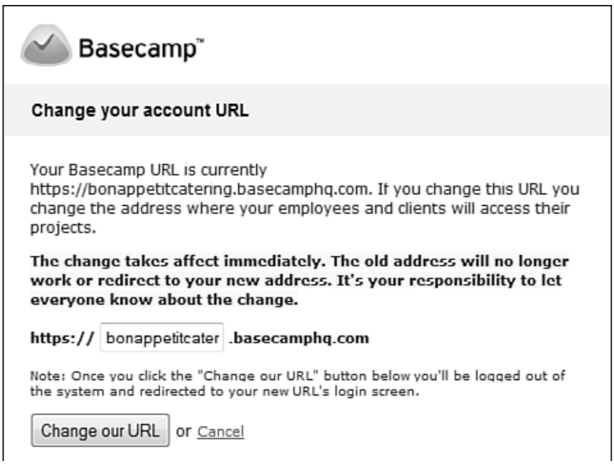


FIGURE 15.2 If your business needs change, you can change your Basecamp URL.

2. Enter your new URL prefix in the text box. Basecamp prompts you with an error message if you try to enter a URL that's already taken.

3. Click the Change Our URL button to confirm the change.

Basecamp logs you out of the system and directs you to the login screen of your new URL.

> CAUTION: **Notify Users Well in Advance of a URL Change**
>
> Your previous URL is no longer active after you make this change. Be sure to inform all your Basecamp users to avoid problems or delays.

Changing Your Credit Card

If you have a paid Basecamp account and want to change the credit card that Basecamp charges every month, click the Change Card link in the upper-right corner of the Account page. This link doesn't appear if you have a free account.

The Change or Update Your Credit Card page opens, where you can enter a new card number or update your expiration date. Be sure to click the Update My Credit Card button to save your changes. All credit card changes take effect immediately.

Viewing Your Invoices

The Invoices section of the Account page lists all your Basecamp invoices by date, including the plan type and fee you were charged. To view an invoice in detail, click its link. Basecamp opens the invoice in a separate window.

Note that the Invoices section doesn't appear if you have no invoices yet or have a free account.

Upgrading Your Account

If you find that your existing Basecamp plan doesn't offer all the features you need, you can upgrade to a more robust plan. See Lesson 1, "Getting Started with Basecamp," for a reminder of what each Basecamp account plan includes.

> NOTE: **Not All Plans Include an Upgrade Option**
> Basecamp displays the Upgrade button only next to account plans that are viable upgrades based on your current plan level.

To upgrade your Basecamp account, follow these steps:

> TIP: **Look for Special Offers**
>
> Review the Account page for news about special offers or discounts. Write down any coupon codes for entry on the next page.

1. Review the upgrade options on the Account page and click the Upgrade button next to the plan you want. Basecamp displays a new page, asking you to confirm your upgrade (see Figure 15.3).

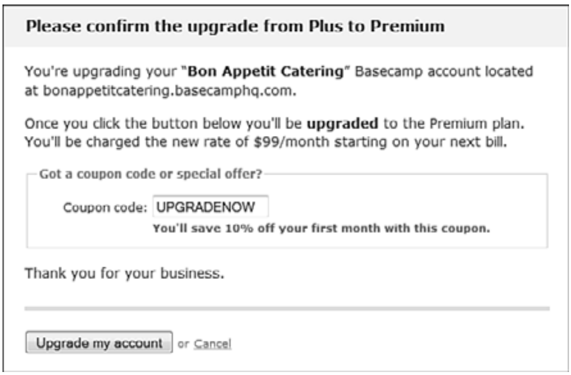


FIGURE 15.3 Easily upgrade to a new plan level if you outgrow your current plan.

2. Enter a Coupon Code if one was listed on the previous page.
3. Click the Upgrade My Account button. If you're upgrading from a free account, this button is called Please Upgrade My Account.

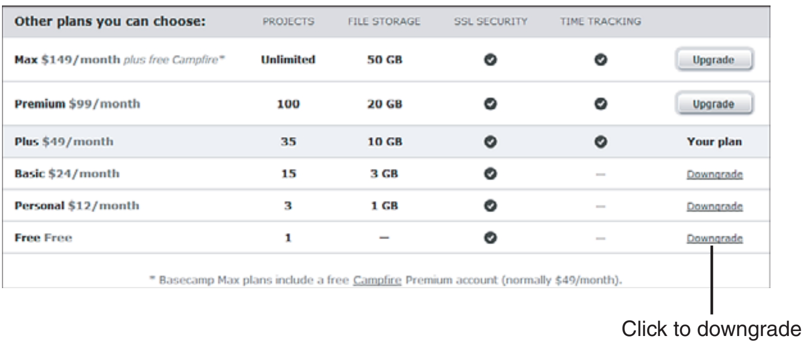
Basecamp charges your new account rate as of your next billing cycle.

> NOTE: **Upgrading from a Free Account**
>
> If you're upgrading from Basecamp's free account plan, you need to enter credit card information to upgrade.

Downgrading Your Account

If you decide that your Basecamp account plan is more than you need, you can downgrade to a less-expensive plan. To do so, follow these steps:

1. Click the Downgrade link below the account upgrade options on the Account page. The page expands to list the available downgrade options based on your current plan and number of active projects (see Figure 15.4).



Other plans you can choose:	PROJECTS	FILE STORAGE	SSL SECURITY	TIME TRACKING	
Max $149/month *plus free Campfire**	Unlimited	50 GB	✔	✔	Upgrade
Premium $99/month	100	20 GB	✔	✔	Upgrade
Plus $49/month	35	10 GB	✔	✔	Your plan
Basic $24/month	15	3 GB	✔	—	Downgrade
Personal $12/month	3	1 GB	✔	—	Downgrade
Free Free	1	—	✔	—	Downgrade

* Basecamp Max plans include a free Campfire Premium account (normally $49/month).

FIGURE 15.4 Select from your available downgrade options.

2. Click the Downgrade link next to the plan to which you want to downgrade. A new page opens, asking you to confirm your downgrade.

3. Click the Downgrade My Account button to confirm your request.

Basecamp will charge you the new account rate as of your next billing cycle.

Paying in One Lump Sum

To pay for Basecamp in one lump sum rather than on a monthly basis, follow these steps:

1. Scroll down to the Prefer to Pay in One Lump Sum Instead of Monthly? section on the Account page (about halfway down the page).
2. Click the You Can Pay in One Lump Sum link. Basecamp opens the Make a Lump Sum Payment page, shown in Figure 15.5.

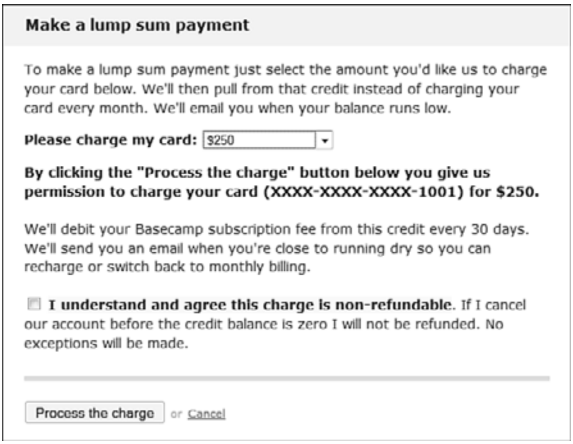


FIGURE 15.5 Avoid monthly payments by paying in one lump sum.

3. Select one of the following payment amounts from the Please Charge My Card drop-down list: $50, $100, $250, $500, $1000, or $2000.
4. Click the Process the Charge button.

When your balance runs low, Basecamp sends you a reminder email.

> CAUTION: **Lump Sum Payments Are Not Refundable**
>
> Although lump sum payments are convenient, be aware that they aren't refundable. Be sure you really want to use Basecamp for the timeframe you're paying for. Otherwise, the month-to-month plan is a better option.

Changing the Account Owner

You specified an account owner when you signed up for Basecamp, but you can change the account owner to another Basecamp user at your company. However, you can't assign this role to a person at another company, such as a client, vendor, or partner. When you make this change, the existing account owner no longer has permission to perform tasks such as upgrading and downgrading plans, changing credit card information, or cancelling accounts.

See Lesson 3, "Managing People, Companies, and Permissions," to learn more about account owners and other Basecamp roles.

To change the account owner, follow these steps:

1. On the Account page, scroll down to the Want to Make Someone Else the Account Owner? section, shown in Figure 15.6.

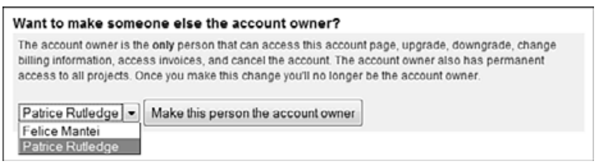


FIGURE 15.6 Transfer account ownership to another Basecamp user.

> NOTE: **Why Can't I Change the Account Owner?**
> Your Basecamp account must include more than one user for this section to appear. You can't transfer ownership to anyone who isn't entered into your Basecamp system. See Lesson 3 for more information on setting up additional users.

2. Select the name of the new account owner from the drop-down list.

3. Click the Make This Person the Account Owner button. Basecamp opens a warning box asking you to confirm this change.

4. Click the OK button to confirm. Remember that you can have only one account owner. Once you transfer this right to another user, you relinquish your account owner privileges unless the new owner transfers this right back to you.

Canceling Your Account

If you decide that Basecamp isn't the right project management tool for your business, you can cancel your account at any time. Be aware that if you cancel your account in the middle of a billing cycle, you're still responsible for any outstanding invoices.

> CAUTION: **You Can't Reverse a Cancellation**
>
> Be sure that you really want to cancel before proceeding. You can't reverse a cancellation, and your Basecamp data is deleted permanently.

To cancel your account, follow these steps:

1. On the Account page, scroll halfway down the page to the Need to Cancel Your Account? section.
2. Click the Refund Policy link and verify that you understand the policy before proceeding.
3. Click the Please Cancel My Account link. Basecamp opens a verification page, asking you to confirm your cancellation.
4. Click the Cancel My Account button to confirm.

Before canceling your account, you might want to consider exporting your Basecamp data for future reference. See "Exporting Your Basecamp Data" later in this lesson for more information.

Enabling the Basecamp API

If you want to take advantage of some third-party applications that integrate with Basecamp, or you're a developer and want to integrate with Basecamp data, you can enable the Basecamp API for your account.

> PLAIN ENGLISH: **API**
>
> **API** stands for Application Programming Interface. It's a software interface that lets one website communicate with another website or application. You can use the API to establish Basecamp integration with other products you create or use, such as one of the many third-party add-ons available at http://basecamphq.com/extras.

To enable the Basecamp API, scroll down the Account page to the Basecamp API section, read and agree to the terms of service, and click the Yes, Please Enable the Basecamp API for This Account box.

Learn more about the Basecamp API at http://developer.37signals.com/basecamp. There is also a Google Group dedicated to discussing the Basecamp API at http://groups.google.com/group/37signals-api.

Exporting Your Basecamp Data

Basecamp enables you to export your data once a day. Exports include messages, to-do lists, milestones, time entries, and people.

> TIP: **Export Time-Tracking Data**
>
> You can also export your time-tracking data from Basecamp. See Lesson 10, "Tracking and Managing Time," for more information.

To perform an export, scroll down to the bottom of the Account page to the Need to Export Your Data? section (see Figure 15.7) and select one of the following options:

- **Normal HTML Export.** Exports your data as HTML files you can view with a browser. This is the format Basecamp recommends for most users.
- **Raw Data Export—XML Format.** Exports your data as raw XML that you can use to create custom software or import into a custom database.

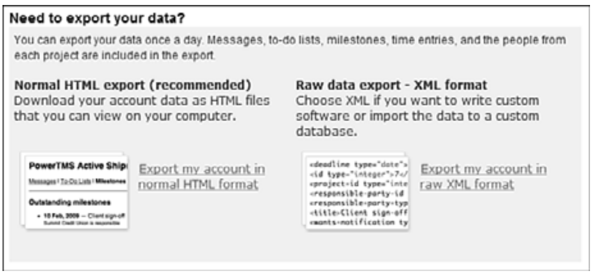


FIGURE 15.7 Export your Basecamp data as HTML or XML.

The third-party application ThickToast (http://www.vb123.com/basecamp) enables you to easily import your XML data into Microsoft Access. See Lesson 16, "Integrating Basecamp with Add-ons and Other Applications," for more information.

> PLAIN ENGLISH: **XML**
>
> **XML** stands for Extensible Markup Language and is an open standard for structuring information. One sample use of your exported Basecamp XML is to import it into Microsoft Access or Excel.

Basecamp sends an email when your data is ready for download in a zipped (compressed) format.

Although Basecamp backs up your data nightly, an export is useful if you want to create your own backups, import your Basecamp data into your own database, or cancel your Basecamp account.

TIP: **Consider External Backup for Added Security**

If your Basecamp data is mission critical or irreplaceable, consider using a backup data service as well. Backupify (www.backupify.com) backs up online data from Basecamp, Twitter, Facebook, YouTube, Gmail, Flickr, Google Docs, and more.

Joining the Basecamp Affiliate Program

If you want to make some extra money referring new users to Basecamp, consider joining Basecamp's affiliate program. To do so, click the Affiliate Program link in the upper-right corner of the Account page.

You can receive up to $75 for initial sign-up and up to $7.45 per month for the duration the person you refer continues to use Basecamp. Basecamp provides links, graphics, and other materials that you can post on your website or blog to help you profit as an affiliate. Basecamp makes all payments to your PayPal account.

Summary

In this lesson, you learned how to perform Basecamp account management tasks. Next, learn how to extend Basecamp with add-ons and other applications.

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LESSON 16

Integrating Basecamp with Add-ons and Other Applications

In this lesson, you learn how to integrate Basecamp with other 37signals applications and third-party add-ons.

Integrating with Other 37signals Applications

Basecamp integrates with other 37signals applications, such as Campfire (www.campfirenow.com), an online chat tool, Highrise (www.highrisehq.com), a contact management system, and Backpack (www.backpackit.com), a collaborative organizational tool. This happens through the 37signals Launchpad.

The Launchpad Launchbar appears at the top of your Basecamp screen (see Figure 16.1) if you have two or more 37signals applications linked with the same 37signals ID or an OpenID.

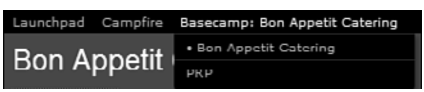

FIGURE 16.1 Switch easily between applications with the Launchbar.

This enables you to access other applications without signing in again, which can be a big timesaver if you use more than one. If you have multiple accounts with one or more of these applications, the accounts appear in a dropdown list.

To access another 37signals application, click its link in the launchbar. Alternatively, click the Launchpad link to open the Launchpad site, shown in Figure 16.2.

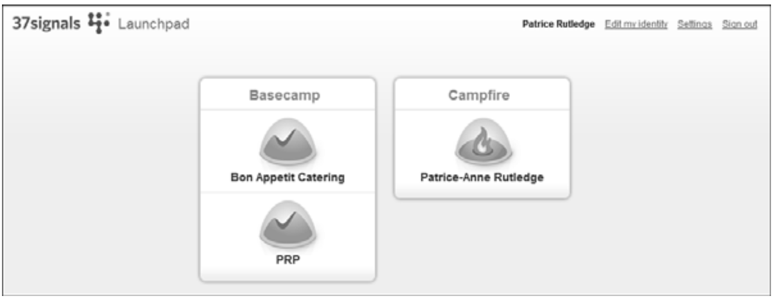

FIGURE 16.2 Configure the Launchpad to work the way you want.

On the Launchpad, you can access all your 37signals applications, edit your identity, rename your accounts, or specify which accounts and applications appear on the Launchpad and Launchbar. You can reorder applications and accounts on the Launchpad by dragging them to a new position on the screen. This also affects the order in which they appear on the Launchbar. If you want to access the Launchpad directly, go to http://launchpad.37signals.com.

NOTE: Other Ways to Integrate

In addition to the Launchpad, there are other ways to integrate Basecamp with other 37signals applications. For example, you can also import the people from your Basecamp system into Highrise and view your Basecamp milestones in your Backpack calendar.

Understanding Basecamp Add-ons

One of the benefits of Basecamp is that it offers a simple, streamlined approach to project management. Rather than overloading you with an extensive array of features and options, it focuses on basic project collaboration. For many people, this is all you need to successfully manage your projects. But if you require additional features, one of the more than 50 add-ons from third-party developers just might suit your needs.

Some of these add-ons were developed specifically to extend the power of Basecamp. In other cases, developers of independent applications have created a way for their apps to integrate with Basecamp. A few of these add-ons are free, but most carry a fee. For many users, these add-ons become an integral part of their success with Basecamp.

> TIP: **Enable the Basecamp API to Use Add-on Applications**
>
> Most add-on applications require you to enable the Basecamp API to access your Basecamp data. From the Dashboard, click the Account (Upgrade/Billing) tab, scroll down to the Basecamp API section near the bottom of the page, agree to the terms, and click the Yes button to enable the API. See Lesson 15, "Managing Your Account," for more information about the Basecamp API.

To view a list of available Basecamp add-ons, go to http://basecamphq.com/extras. Figure 16.3 shows part of the Extras & Add-ons page.

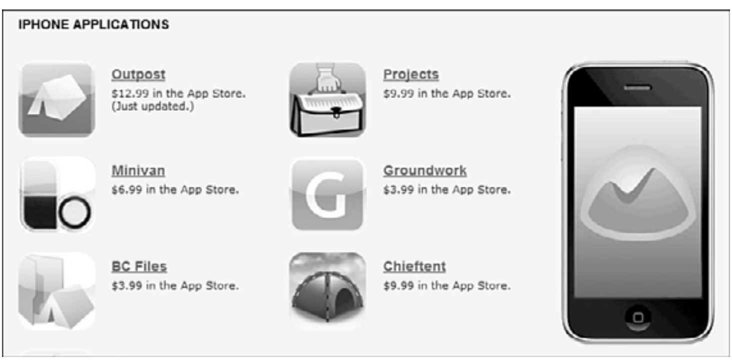

FIGURE 16.3 Basecamp offers numerous add-ons and extras.

This page provides links to more than 50 add-ons, divided into categories such as the following:

- iPhone
- Reporting, Charts, Planning
- Invoicing, Billing, Accounting
- Software Development Tools
- Time Tracking
- Desktop Widgets
- Mobile
- Miscellaneous

Lesson 17, "Accessing Basecamp from Mobile Devices," covers iPhone and mobile applications. The remainder of this lesson focuses on all the other available add-ons.

Choosing the Right Add-on Application

With so many extras and add-on options available, it can be hard to choose the right applications. New apps arrive on a regular basis, and new feature updates are common. In addition, you might be tempted to try out anything that looks cool and interesting, even if it isn't critical to your business success.

Here are some tips for picking the right apps for you:

- Focus on your business needs and how to best achieve them. For example, if you run a service business, detailed time tracking might be important to you. If you develop software using Agile methodologies, one of the many Agile add-ons might provide much-needed insight into your project progress.
- When trying to decide between similar applications, make a list of your must-have features and search for the apps that offer these features. Also, consider pricing differences between similar apps.

- Visit the website of any app you're interested in for more information and product demos.
- Visit the Basecamp forum (http://forum.37signals.com/basecamp) for ideas and suggestions from other users.
- Sign up for any trials to give potential applications a test run.

Integrating Basecamp with Invoicing, Billing, and Accounting Applications

Integrating your Basecamp data with external invoicing and accounting applications can be a big timesaver, particularly if you use Basecamp's time-tracking features to track billable time or need to invoice clients based on Basecamp data.

FreshBooks

FreshBooks (www.freshbooks.com) offers online billing and time tracking, especially suited to freelancers and service providers. You can integrate Basecamp with FreshBooks in two ways: Generate an invoice based on Basecamp time entries or import Basecamp projects into FreshBooks.

FreshBooks offers six different account plans, ranging from a free account with a limit of three clients to the $149 per month Time Machine account that lets you manage up to 5,000 clients.

Simply Invoices

Simply Invoices (www.simplyinvoices.com) is a web-based tool for creating invoices from the time you track in Basecamp. Four account plans exist, ranging from free to $25 per month. The free version enables you to send unlimited invoices, but includes a Simply Invoices logo and link in your invoice PDFs. The paid versions all offer a 30-day trial.

ChronoPipe

ChronoPipe (www.chronopipe.com) enables you to import Basecamp time entries into QuickBooks. You can download a 30-day trial to test ChronoPipe, and sign up for a license starting at $29 if you want to continue using the application (see Figure 16.4).

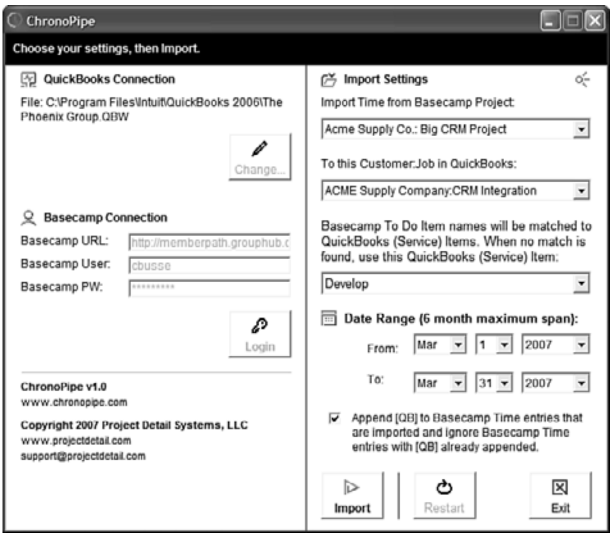

FIGURE 16.4 If you're a QuickBooks user, ChronoPipe helps you integrate directly with Basecamp.

Additional Invoicing, Billing, and Accounting Options

Want even more options? Consider the following if the previous choices don't suit your needs:

- Blinksale (www.blinksale.com). Online invoicing.
- CannyBill (www.cannybill.com). Invoicing, billing, and web hosting automation.
- Cashboard (www.getcashboard.com). Time tracking, estimating, and invoicing application.

- Invotrak (www.invotrak.com). Web-based invoicing and time tracking.
- LessAccounting (www.lessaccounting.com). Full-featured web-based accounting.
- Pulse (www.pulseapp.com). Cash management tool.
- SimplifyThis (www.simplifythis.com). Online billing and appointment-booking.
- The Invoice Machine (www.invoicemachine.com). Online invoicing for freelancers and small business.

Integrating with Reporting, Charting, and Planning Applications

If you're used to traditional project management tools or want to view your Basecamp data in a graphical format, you have several third-party tools to choose from. If Basecamp is your first experience with a project management application, some of the reports and analyses these tools provide might be unfamiliar to you. In this case, focus on the value the charts and reports could provide to your business rather than on terms you don't know.

AgileAgenda

AgileAgenda (www.agileagenda.com) enables you to add task estimates, compare milestone deadlines with your estimates, track task priority, maintain dependencies, and produce project Gantt charts. AgileAgenda charges a one-time fee of $79, but you can download a free 30-day trial.

> PLAIN ENGLISH: **Gantt Chart**
>
> A **Gantt chart** is a horizontal bar chart that depicts a project's progress over time. Named after Henry Gantt, Gantt charts are a popular project management tool.

Burndown

From its name, it's quite obvious what Burndown (www.burndowngraph.com) does. It creates burndown charts from your milestones and to-do lists. Burndown offers several account plans ranging from $3 to $37 per month, depending on the number of users and active burndowns you require. You can sign up for a free 30-day trial to try out the system. Figure 16.5 shows a sample burndown chart.

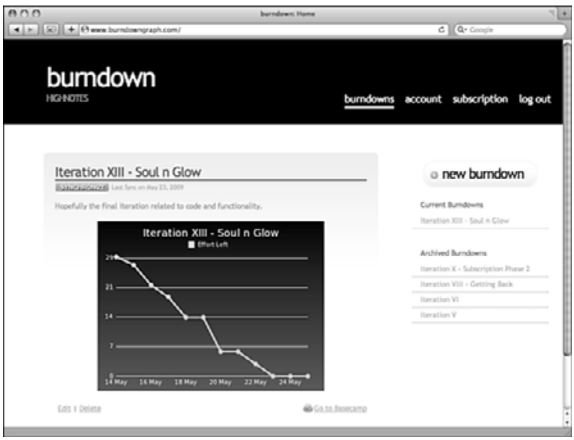

FIGURE 16.5 Create burndown charts to help you analyze your Basecamp data.

> PLAIN ENGLISH: **Burndown Charts, Scrum, and Agile**
>
> A **burndown chart** is a graphical representation of the work left to do in a project vs. the time remaining. Burndown charts are common for projects managed using Scrum. **Scrum** is a framework for managing complex projects developed with the **Agile** methodology, which emphasizes collaborative, iterative development. Although this methodology is popular for software development projects, you can apply these principles—and burndown charts—to other project types as well.

VisioPlanning

VisioPlanning (www.visioplanning.com) offers a color-coded real-time view of your projects' progress and status. VisioPlanning is a web-based application designed specifically to analyze Basecamp data. Pricing ranges from $5 to $40 per month based on your number of users. A free 30-day trial is available.

Additional Reporting, Charting, and Planning Options

Here's a round-up of several other applications that integrate with Basecamp:

- BC Toolkit (www.bctoolkit.com). A Basecamp reporting tool.
- IntelliGantt (www.teamdirection.com/intelligantt). Offers Gantt charts, dashboards, costing, and more.
- PlannerX (http://plannerx.appsmagnet.com). A single-screen project management view with Gantt charts.
- PPMLite (www.ppmlite.com). A project portfolio management tool.
- YouCalc (www.youcalc.com/apps/basecamp). Offers six Basecamp add-ons including an activity report, milestone overview, and Gantt chart.

Integrating with Time-Tracking Applications

In Lesson 10, "Tracking and Managing Time," you learned how to use Basecamp's time-tracking feature. Although this feature might suit the needs of many Basecamp users, others might need more precise time tracking, particularly if you bill by the hour and need to estimate and manage time closely.

Project Recon

Project Recon (www.projectrecon.net) is a time-tracking application that you download and install on a Windows computer. Pricing is per user on a sliding scale. One user is $25; 11 or more users are $15 each.

With its iPhone-inspired design, Project Recon enables you to clock in to your project and to-do list items and send times to Basecamp.

Basecamp Time Widget

The Basecamp Time Widget (http://bitbucket.org/seph/basecamp-time-widget/wiki/Home) is a dashboard widget for the Mac OS that enables you to track and submit time to Basecamp. Figure 16.6 shows an example of this free widget.

FIGURE 16.6 Use a widget to help track the time spent on a project.

Tick

Tick (www.tickspot.com) enables you to both track and budget your time with a link to your Basecamp projects. Tick also includes a timer widget to keep track of time as you spend it. Pricing ranges from a free plan to $79 a month for unlimited open projects. All paid plans offer a 30-day free trial.

Additional Time-Tracking Options

There's no shortage of add-ons that offer time-tracking functionality. Here are a few other options that integrate with Basecamp:

- Chronicle (www.getchronicle.com)
- Harvest (www.getharvest.com)
- Toggl (www.toggl.com)

Integrating with Other Third-Party Applications

Basecamp integrates with a wide variety of other applications that extend its power, protect your data, or make your business life easier.

Backupify

Backupify (www.backupify.com) offers online account backup for your lifestream data. This includes data stored on web-based applications, such as Basecamp, Gmail, Google Docs, Zoho, Twitter, and more. Pricing options range from $3.95 to $14.95 per month.

PLAIN ENGLISH: **Lifestream**

A **lifestream** is the stream of information about your life—both personal and professional—you enter on sites on the web. For example, your Basecamp data, Twitter tweets, Gmail messages, and more are all part of your online lifestream.

ProofHQ

ProofHQ (www.proofhq.com) simplifies the review and approval process for design firms that use Basecamp. With ProofHQ, you can centralize feedback and approval on the design of ads, brochures, photos, illustrations, press releases, web pages, and more. Figure 16.7 shows an example of a ProofHQ proof within Basecamp.

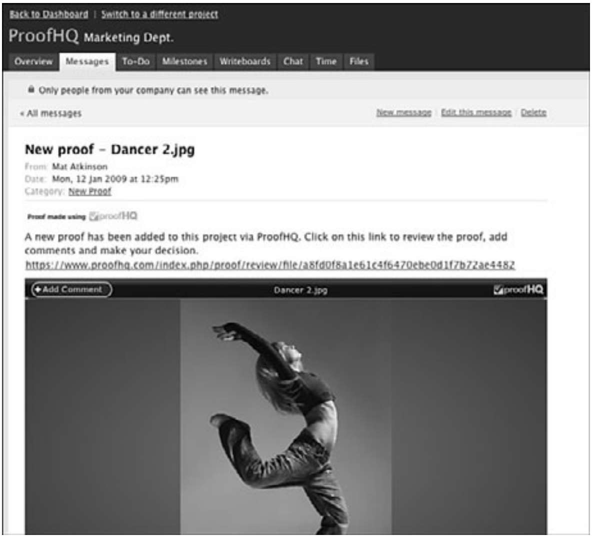

FIGURE 16.7 Simplify the proof review and approval process with ProofHQ.

Pricing ranges from free for a personal plan with five proofs per month to a corporate plan allowing 2,000 proofs per month at $499. You can sign up for a free 14-day trial to try out ProofHQ or request a sample proof to be sent to your inbox.

Mailmanagr

Mailmanagr (www.mailmanagr.com) provides an email interface for Basecamp, enabling you to post messages, milestones, and to-dos via email. Mailmanagr offers a free version for up to 20 email addresses. For $7 per month, the number of email addresses is unlimited.

Other Third-Party Applications

Still looking for more options? Here are a few more interesting apps that provide a useful extension to Basecamp:

- Avalanche (www.avalanche-widget.org). Free Yahoo! widget for Basecamp users.

- Freshlog (www.freshlog.com). Screen capture for Agile project collaboration.
- Periscope Gadget (www.periscopegadget.com). Basecamp control for iGoogle and Gmail.
- Springloops (www.springloops.com). Source code management tool for software development.
- ThickToast (www.vb123.com/basecamp). Microsoft Access and SQL Server import tool.

Summary

In this lesson, you learned how to integrate Basecamp with other 37signals applications, as well as numerous add-ons that extend and enhance your Basecamp experience. Next, learn how to access Basecamp on your mobile device.

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LESSON 17

Accessing Basecamp from Mobile Devices

In this lesson, you learn how to access your Basecamp data from a mobile device.

Understanding Mobile Access Options

For professionals on the go, accessing your Basecamp system from a computer might not always be the most convenient option. The good news is that there are numerous add-on applications that enable you to view, manage, and update your Basecamp data from your mobile device, such as an iPhone, iPod Touch, BlackBerry, Treo, Nokia s60, and many others.

> TIP: **Enable the Basecamp API to Use Mobile Applications**
>
> Most add-on applications require you to enable the Basecamp API to access your Basecamp data. From the Dashboard, click the Account (Upgrade/Billing) tab, scroll down to the bottom of the page, agree to the terms, and click the Yes button to enable the API. See Lesson 15, "Managing Your Account," for more information about the Basecamp API.

Most Basecamp mobile apps enable you to do some or all of the following:

- View the latest activity on the Dashboard and project Overview pages

- Create, update, and delete messages and comments
- Create, update, and delete to-do lists and items
- View and update time logs
- View and comment on writeboards
- View file types recognized by mobile platforms, such as PDFs, certain image files, Microsoft Office documents, and plain text files

Accessing Basecamp from Your iPhone

If you have an iPhone (or iPod Touch), there are several applications that enable you to manage your Basecamp system on the go, with more being developed all the time. To explore the options available to you, you can do the following:

- View a current list of Basecamp iPhone applications on the Extras & Add-ons page (http://basecamphq.com/extras), shown in Figure 17.1.
- Open iTunes, click the iTunes Store link, and search the iTunes App Store for Basecamp apps. You can purchase any of these add-on applications in this store. Figure 17.2 shows several Basecamp apps in the iTunes App Store.

FIGURE 17.1 The iPhone is the most popular device for mobile Basecamp access.

FIGURE 17.2 Purchase your iPhone app in the iTunes App Store.

Exploring Basecamp iPhone Apps

Some of your many choices for accessing Basecamp from your iPhone include the following:

- Chieftent (www.readdle.com/products/chieftent), $9.99
- Insight (www.encampapp.com), $9.99
- Groundwork (www.enormego.com/products/groundwork), $7.99
- Outpost (www.outpostapp.com), $12.99
- Projects (http://appremix.com/projects), $9.99
- Sherpa (www.wiredthing.com), $3.99

Figure 17.3 shows an example of a project overview page using the mobile app Chieftent.

FIGURE 17.3 View your Basecamp data on your iPhone with Chieftent.

Choosing the Right iPhone App

With so many options for iPhone access, it can be hard to choose the right application. New apps arrive on a regular basis, and new feature updates are common.

Here are some tips for picking the right app for you:

- View the description of what each app does on its website and its iTunes page.
- Try out any demos on the app website.
- Make a list of your must-have features and search for the apps that offer these features.
- Try out some free apps first to get a feel for how Basecamp works on your phone. Then, upgrade if your choice doesn't offer all the features you need.

Accessing Basecamp from Other Mobile Devices

If you don't have an iPhone, there are still options for you to access your Basecamp data on your phone.

- Phon*i*fied Tracker (www.phonified.com/Tracker.html) enables you to access Basecamp from Nokia s60 phones, BlackBerry devices, and Palm Treos running PalmOS. You can sign up for a free 10-day trial of Phon*i*fied Tracker to see if it's right for you. After the trial, you need to pay a one-time license fee of $24.95 per user.
- TrailGuide (www.carrytheday.com) offers mobile Basecamp access for Windows Mobile Professional (Pocket PC) and Windows Mobile Standard (Smartphone) devices, including numerous Cingular, T-Mobile, Samsung, and Palm phones. TrailGuide charges a monthly access fee of $1.99 per user, but offers a free 30-day trial to try out its service. Figure 17.4 shows a sample of TrailGuide in use.

FIGURE 17.4 TrailGuide's What's Fresh view gives you the latest news on your Basecamp projects.

Summary

In this lesson, you learned how to access your Basecamp data from a mobile device, such as an iPhone or BlackBerry.

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