



Basecamp Webinar

Project Management 101 Series

Session goals and objectives

- Basecamp Orientation
- Assume the role of a Project Manager or Admin
- Practical application of Workshop content
- Apply Basecamp Best Practices

Session Content

- Signing up
- Creating a profile
- Setting up notifications
- Setting up a new project
- Communicating with your team
- Creating To-Dos
- Setting up automatic messages
- Handling Docs and Files
- Enabling Client Access
- Getting Support quickly

Demo: Signing up for Basecamp

3,929 businesses signed up for Basecamp last week. Join them!

"We can see exactly what needs to be done and when. We were missing tasks and deadlines before we found Basecamp. We're much more efficient now."

-Tina Lannin, 121 Captions

"Communication with clients now goes super smoothly."

-George Groves, Piehole.TV

Sign up with your email address:

julie@widgetco.com

Start your free 30 day trial

Or

Use your Google account

Navigating Basecamp

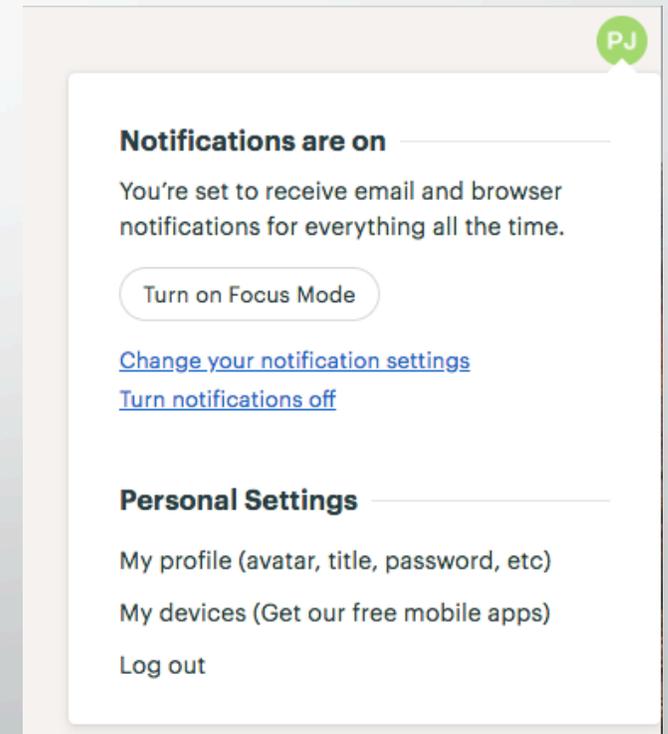
The Homepage

- Navigation Bar
- HQ
- Teams
- Projects

The screenshot displays the Basecamp homepage interface. At the top is a navigation bar with icons and labels for Home, Pings, Hey!, Activity, and Find. Below this is a search bar with the placeholder text "Jump to a team or project...". A tip below the search bar reads: "Press ⌘+J to quickly jump to a project or team from anywhere." The main content area features a card for "East Meadowbrook Library HeadQuarters" with a description and a list of links: My Assignments, My Bookmarks, My Schedule, My Drafts, My Recent Activity, and My Applause. Below this are two sections: "Teams" and "Projects". The "Teams" section includes a "+ New" button and two team cards: "Regional Conference" (marked as a sample) and "Maker Faire Project Team". The "Projects" section includes a "+ New" button, a tip: "Do the same sorts of projects over and over? [Make a reusable template](#) to save yourself time.", and three project cards: "Making a Podcast" (marked as a sample), "Launching Gizmo", and "Maker Faire Event".

Update your Profile and Preferences

- Notification Settings (What/how/when)
- Profile settings
- Switching to Google Sign-in
- Devices (iOS and Android)
- Adminland



A screenshot of a user settings menu. At the top right, there is a green circular profile picture icon with the initials 'PJ'. Below it, the text 'Notifications are on' is followed by a horizontal line. Underneath, it says 'You're set to receive email and browser notifications for everything all the time.' There is a button labeled 'Turn on Focus Mode'. Below the button are two links: 'Change your notification settings' and 'Turn notifications off'. Further down, the text 'Personal Settings' is followed by a horizontal line. Below this, there are three menu items: 'My profile (avatar, title, password, etc)', 'My devices (Get our free mobile apps)', and 'Log out'.

Projects

The Distance Podcast

Telling the stories of businesses that have endured at least 25 years

 Add/remove people...

Campfire

-  Victor Cooper 3:35pm Upgrade that!
-  Cheryl Walters 3:35pm done and done!
-  Victor Cooper 3:35pm Hi Jason,
-  Annie Bryan 3:35pm 🍷 - Yay!
-  Cheryl Walters 3:35pm Boom!

Message Board

-  New iTunes description copy 1
-  Change the name/branding Question — There's some 5
-  Meatier Podcast Excerpts Pitch — Hey Annie, This 7
-  Listeners This Week 🍷 Heartbeat — Having some
-  Thanks from Sweden 🍷 FYI — "Hi ! My name is

To-dos 12/20

Newsletter updates

- Signup page 1
- Link to iTunes 1

Episode 10: Carma Labs I

Episode 11: Carma Labs II

- Edit 5  Cheryl W.
- Title/description/tags/show notes 1  Annie B.
- Illustration 5  Jared D.

Schedule

- Thu, Feb 22**
 - Upload  Episode 11: Carma Labs II
- Thu, Mar 15**
 - Call with iTunes 5   
 - 7:00am - 7:30am
- Tue, Apr 10**
 - Feature Artwork due to iTunes 2  

Automatic Check-ins

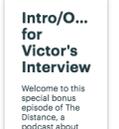
Asking 8 people every Monday at 9am.

Do you have any ideas for a future show?

     ...

Docs & Files

- 

Notes: Here's where...
- 

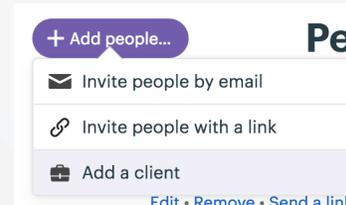
Welcome to this special bonus episode of The Distance, a podcast about
- 

...and 7 more
- 

- 
-  Edit name, description, type
-  Change tools
-  Archive or delete
- For developers**
-  Configure chatbots
-  Set up webhooks

Client-side

- Adding Clients at the Project level
- Welcome letter with a link + Pin
- Client-side is now visible
- Turning off



Go to the Clientside for BuildCo Inc. →

Projects - tools

- Campfire: Used for Group Chat



- Message Board: For more detailed content/discussions



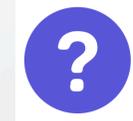
- To-dos: Organize work assignments



- Schedule: Due dates, milestones and events



- Automatic Check-ins: Ask your team questions



- Docs & Files: Organize reference materials



- Email Forwards: Forward emails into basecamp

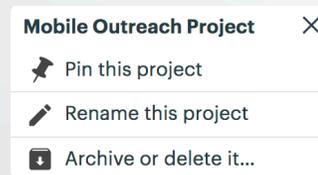


Creating a new Project

- Click on New 

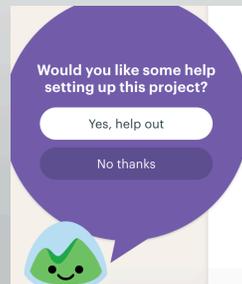
- Provide a name

- Additional Settings



- Click on the Project Tile

- Setup Wizard



- Guided Setup

OK, great! First, do you have a start date or a deadline for the work you'll be doing?

Next, have any files (images, PDFs, Google Docs, etc.) that you'll need to work on the project?

Next, want to jot down a list of things that need to be done on this project?

Last step! Want to write a kickoff message to introduce this project?

Campfire

- Great for formal announcements
- Use @person to address them
- Chats show up in their “Hey!” activity
- Follow to show up in your feed

Message Board

- Structured conversations, great for
 - Announcements, Updates, Pitches, Focused Discussions
- Messages
- Message Categories [Announcements/FYIs/Heartbeats/Pitches/Questions]
- Control the audience
- Post immediately or save in drafts (Homepage)

To-do Lists

☰ **Define Event Space** 1 1/5 completed

☰ Identify potential layout plans Thu, Apr 19 Joanne M.

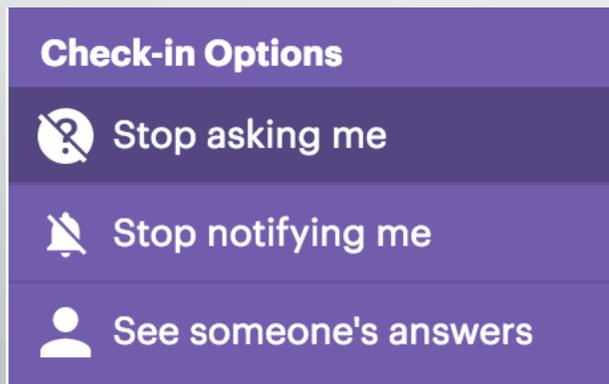
- Assign tasks, due dates, add attachments
- Track Statuses
- Organize Tasks into Lists
- Drag and Drop ordering
- Add to-dos to lists
- Subscribe to get updates
- Share with the public

Schedule

- Create Events and track them here
- Lists to-dos and tasks due on specific dates
- Update task status in calendar
- Sync with your Google/Outlook/Apple calendar
- Share with the public [Get a public link](#)

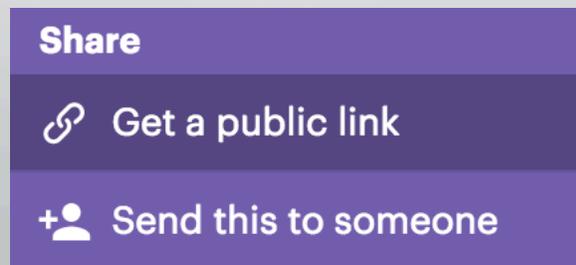
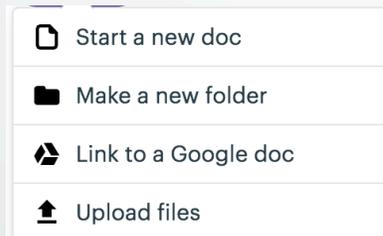
Automatic Check-ins

- Eliminate unnecessary meetings
- Posting a new question
 - Question / Frequency + Time / People to ask
- Options



Docs & Files

- Put templates and shared documents here
- Create Documents
- Organize Files into Folders
- Link to Google Docs
- Drag files into folders
- Sharing Options



Getting help

- Help Menu 
- Contact Support (scroll down) [Need a hand with anything? We're standing by!](#)
- Additional options: Email/Twitter/Live Classes

Best Practices

- Campfire is NOT private
- Use the Document section for reusable files
- Archive old projects
- Start with a project, then roll out to a larger group

Conclusion

- Next Session: Asana
- Additional Resources:
 - Website link to download: <http://www.samsena.com/PM-101-2018>

Appendix: Permissions

Permissions

Who can do what?

Clients can only:

- Reply to emails sent from the Clientside. Learn more about working with clients.