

# **Section 7**

## **Basecamp**

## INTRODUCTION

Basecamp is an online platform the Board uses for sharing and storing documents, discussing issues, and keeping track of tasks. In many cases, it supplants the need for long email conversations. Basecamp is a one-stop for all Board messages and materials.

## NAMING CONVENTIONS

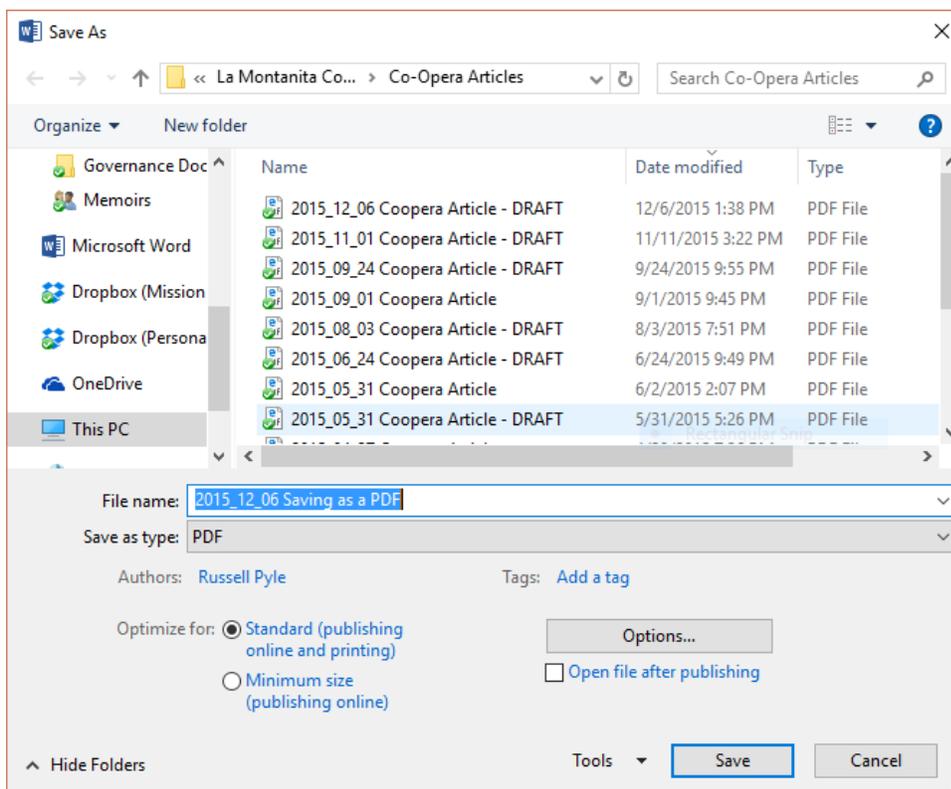
Before uploading a document to Basecamp, make sure the file name is formatted as follows: [Year]\_[2-digit month]\_[2-digit day] [Name of document]. Put spaces between the words in the file name. For example:

- 2015\_07\_18 Monthly Meeting Agenda.pdf
- 2015\_11\_25 Board Development Minutes.pdf

## HOW TO SAVE AS PDF

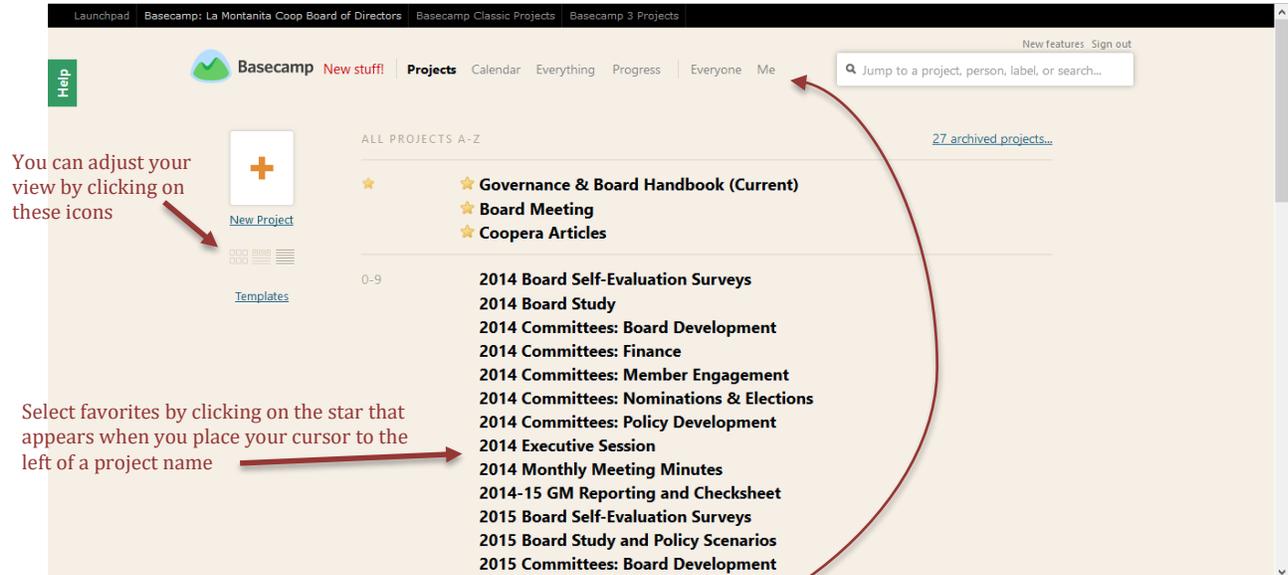
Before uploading a document to Basecamp, save it as a PDF. This makes it easier for others to view the document from Basecamp without downloading it.

1. Any file created in Microsoft Office (Word, Excel, Powerpoint) can be saved as a PDF. Go to File > Save As.
2. Browse to the location where you would like to save the file on your computer.
3. Enter the file name.
4. Select “PDF” from the dropdown next to “Save as Type.”
5. Click “Save.”



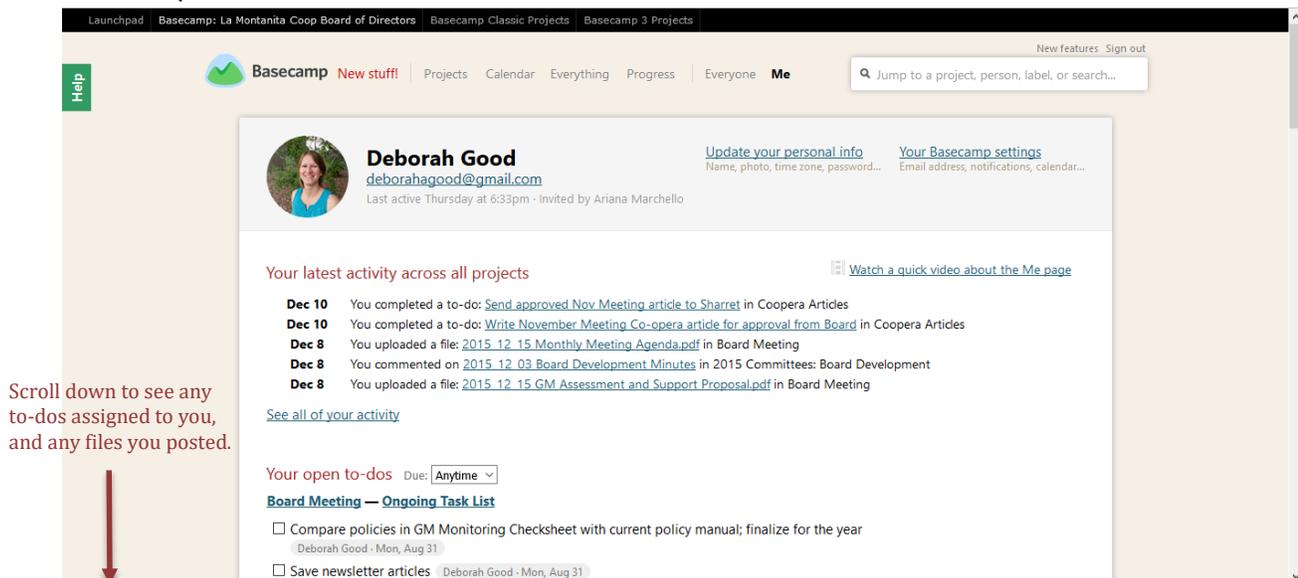
## SIGNING IN TO BASECAMP

1. In order to access Basecamp, you must be invited. The invitation will arrive as an email, from which you can create a Basecamp account if you don't already have one.
2. You will need to remember your username and password so you can sign in from different devices and computers in the future.
3. After you sign in, your screen should look like the image below (it will look different on a tablet or phone). The list on your screen may differ from those listed here, depending which projects you have been given access to:



## WHAT YOU SEE WHEN YOU CLICK ON “ME”

The words across the top of your Basecamp screen provide an easy-to-navigate menu. Clicking on “Me” gives you access to information about your account and your own activity on Basecamp.



- a. *How to upload a photo of yourself:* From the “Me” page, click on “Update your personal info.” Click on “Browse” and locate a photo on your computer that you would like to use.
- b. *How to change your notifications settings:* From the “Me” page, click on “Your Basecamp setting.” This page allows you to choose how often you wish to receive notifications of activity on Basecamp, and which email address you would like to receive the notifications.

## BASECAMP PROJECTS

In Basecamp, “projects” serve as workspaces where we collect our discussions, to-dos, documents, and files related to particular aspects of our work. Board members have access to a list of more than thirty projects, but a select few are the most important to know about:

- **Board Meeting** – All Board members are responsible to review the files posted to this project prior to the monthly Board meeting. The agenda and all materials for the Board meeting should be posted here at least one week ahead of time. Following the meeting, the administrative assistant moves all files from the Board Meeting project to be stored in their appropriate locations.
- **Executive Session** – All Board members are responsible to review the files posted to this project prior to an executive session. After materials have been reviewed and/or approved by the Board during executive session, the administrative assistant moves them from the Executive Session project to a second project called **Executive Session Archive**.
- **Board Handbook (Current)** – This project is where all sections of the Board Handbook are stored, including the Board Policy Manual, the annual Calendar, Board and Staff Rosters, and other helpful documents. In fact, the document you are currently reading is one section of the Board Handbook and can be found in the “Board Handbook (Current)” project on Basecamp.
- **Committees** – Each committee has separate projects, one for each year. For example, the project called “2015 Committees: Finance” is where all agendas, approved minutes, policies, and other documents related to the Finance committee are stored for the 2015 calendar year.

## WHAT YOU SEE WHEN YOU CLICK ON A PROJECT

From the La Montañita landing page in Basecamp, you can click on any project in the list. This will take you to the page for the selected project. Each project page allows you to view or add new:

- Discussions
- Files
- To-do lists
- Text documents
- Events

Project pages look like this:

The screenshot shows a Basecamp project page for "2015 Committees: Member Engagement". At the top, there's a navigation bar with "Projects", "Calendar", "Everything", "Progress", "Everyone", and "Me". A search bar is on the right. Below the project title, there are links for "Invite more people" (11 people on this project) and "Catch up on recent changes". A sub-navigation bar includes "31 Discussions", "39 Files", and "Add the first: To-do list, Text document, Event".

The "Latest project updates" section shows three entries from Dec 7: a comment on "Photos for the Board's Board 12.15.17", an invitation to gregorystephangould@hotmail.com and courtney@quiviracoalition.org, and another comment on "Photos for the Board's Board 12.15.17". A "See all updates" link is below.

The "Discussions" section has a "Post a new message" button. It lists four discussions:

- lisa b. "Photos for the Board's Board 12.15.17 - Hmmm will figure something out." (Dec 7, 2 replies)
- lisa b. "2015 11 09 Member Engagement Minutes - Meeting Minutes 11/09/15" (Nov 9)
- lisa b. "Agenda ME meeting Monday 11/09/15 - We will have a member engagement meeting at the CDC at 5:30pm this coming Monday the 9th. Short agenda covering AMM and coop cafes. Thank you." (Nov 7)
- Tammy P. "Newsletter article for November - Good job." (Oct 10, 6 replies)

James E. has a discussion "Here's what I came up with for the newsletter..." (Oct 9, 8 replies). A "26 more discussions" link is at the bottom.

The "Files" section has an "Add files" button. A "Watch a quick video about Files" link is also present.

Annotations with red arrows point to:

- The "Photos for the Board's Board 12.15.17" discussion title, with text: "Description of the latest Basecamp activity related to this project".
- The "Post a new message" button, with text: "To add to a discussion, click on the title of the discussion, and add your own comments. Have a new topic to discuss? Click on 'Post a new message.' When posting comments on a discussion board, you can attach files. You can also designate who should receive an email notification with your comment."
- The "Add files" button, with text: "Click here to upload a file. Click on an existing file to view it and/or to comment on it."

## DISCUSSIONS BY EMAIL

When you receive a notification in your email inbox that someone has posted to a discussion in basecamp, you do not have to open Basecamp to respond. If you prefer, you can simply reply to the email, and your message will be posted automatically to the appropriate discussion board on Basecamp.

## POSTING FILES

Posting a file to Basecamp is easy. You can attach it to a comment on a discussion board, or you can simply upload a document to the project page by clicking "Add files." In either case, you have two options: You can drag and drop a document from your computer's files, or you can click on "select files from your computer." As a reminder, PDFs are always preferable.

Now you know the Basecamp basics. Spend some time exploring. Check out the different navigational options Basecamp offers when you click on "Calendar," "Everything," and "Progress." Try creating a new task, and then checking it off. Read and watch videos available on Basecamp's Help page. If you have questions or want an additional tutorial, ask Deborah ([deborahagood@gmail.com](mailto:deborahagood@gmail.com)), the Board's administrative assistant.