

VIDEO TUTORIAL

Managing Projects Using



Project Management Software

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LIS4708 - Perspectives of Information
Technology
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Introduction

WHAT IS BASECAMP

Basecamp is a popular, web-based project management solution used by organizations. Using a different approach than many other project management software solutions such as Microsoft Project, Basecamp makes use of the power of Web 2.0 to bring project members, managers, and clients together in one complete and unified application.

SCOPE

The concepts behind project management are beyond the scope of this manual. Instead, this manual will focus on the technicalities and operation of the Basecamp software solution. The following tutorial will utilize a simplistic example of an underway project for conciseness and ease-of-understanding.

ABOUT THE WRITER

Clint Morrow is a senior enrolled in the Florida State University's College of Information undergraduate program. He will graduate in May of 2009 with a Bachelor of Science degree in Information Technology. His career focus is on project management, systems administration, and information security.

OBJECTIVES

Upon completion of watching the video tutorial and supplementary manual, you should be able to effectively do the following:

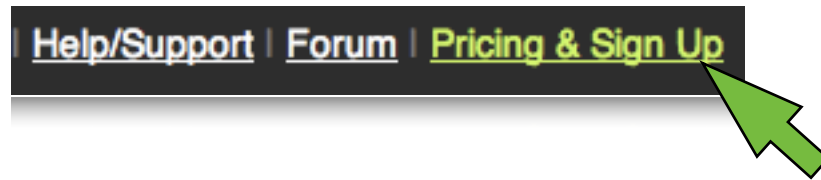
- Create a Project in Basecamp
- Create and Manage Users in Basecamp
- Effectively Use Basecamp to Manage Projects Using To-Do's, Milestones

Getting Started

CREATING A BASECAMP ACCOUNT

Basecamp offers several paid and one free solution for project management. For this manual, the free version will be utilized.

First, navigate to Basecamp’s website, located at www.basecamp.com. Click on the “Pricing & Sign Up” link. Hidden at the bottom of the page is a small link to sign up for a free plan.



Second, you will need to enter the information shown in the diagrams to the right.

The Administrator account is the primary account. It is used to manage other users, projects, and access restrictions, as well as management of the Basecamp account itself. Please choose a password and login credentials carefully.

The Basecamp site address will be the website address you will instruct project members to go to.

Finally, accept the terms and conditions by clicking the “Place order & create my Basecamp site” button.

Create your administrator account

This is the master log-in for your account. All fields are required. Once your account is set up you can add accounts for other people as well. Each person will have their own username and password.

First name

Last name

Email

Username
What you'll use to log in (or use [OpenID](#)).

Password

Password again
Confirm your password by entering it again.

Company/Group
Examples: Apple, UCLA, Red Cross

Time zone

Create your Basecamp site address

Every Basecamp site has its own unique web address. This is where you'll login. For example, if you wanted your Basecamp site to be at `acme.basecamp.com` you'd enter `acme` in the field below. **Letters and numbers only — no spaces.**

http:// .basecamp.com

Referrer (OPTIONAL)

If you were referred to Basecamp by another person, you may enter their referrer code below.

Referrer code

Review, accept terms, & complete signup

You have selected the Free 1-project plan
You'll be able to manage 1 project with the free plan (there is no time limit on the free plan — you can use it for free as long as you'd like). You can always upgrade to a paying plan later if you need to manage more projects or share files.

You will log in at this address
`http://NAME.basecamp.com`

Please review our [Terms of Service](#), [Privacy Policy](#), and [Refund Policy](#). If you have questions please [email support](#).

I agree to the Terms of Service, Privacy, & Refund policies

Creating Your First Project

CREATING A PROJECT

After creating your account, you will be asked to create a project. Since this manual utilizes the free plan, this option comes immediately after your first create an account. For this manual's purposes, a project was created named "Web 2.0 Initiative" for Children's Campaign, Inc.

The following steps require you to add companies, users, and finally, the tasks and milestones to a particular project. All of this information is housed in the "My info" section in the top right corner of any page.

CREATING A COMPANY

Next, you will need to create a company to house users for a particular company. Within the "All People" tab, simply click the "Add a new company button" to create a new company.

Then simply type the company's name and click "Create company".

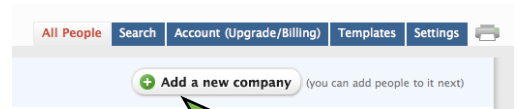
ADDING USERS

After you have added a company, you can now add users within that company. Simply click "Add person" and enter all pertinent information about each employee. As an administrator, you have the power to designate passwords and login information. Proceed with caution! Always use secure passwords.

After you have added your employees, your "All People" table should be populated with all the users who you wish to participate in projects.

(next page)

Your project: [Web 2.0 Initiative](#)



Every company and person in your system

+ Add a new company (you can add people to it next)

Children's Campaign, Inc.

See the administrator list to give or take away admin powers



Children's Campaign, Inc.
487 E Tennessee Street Suite 1
Tallahassee, Florida 32303
O: 850-425-2600
F: 850-425-2620
www.iamforkids.org

[Edit](#) this company
[Add person](#) to Children's Campaign, Inc.



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[Edit](#)

Populated People Listing for "Children's Campaign, Inc."

Managing Your First Project

After creating your first project, you will have the option to create To-Do's, Milestones, and communicate with project members using the Chat, Writeboard, and Message functions. Below is the "Web 2.0 Initiative" Project as you will first see it.



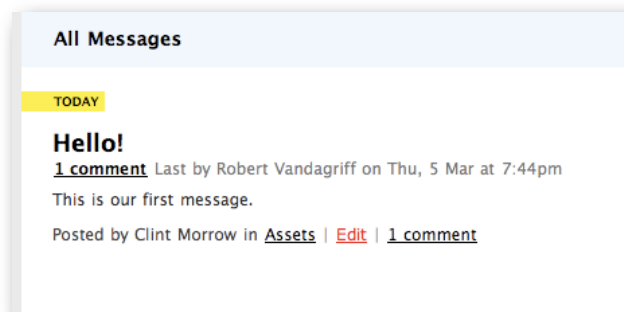
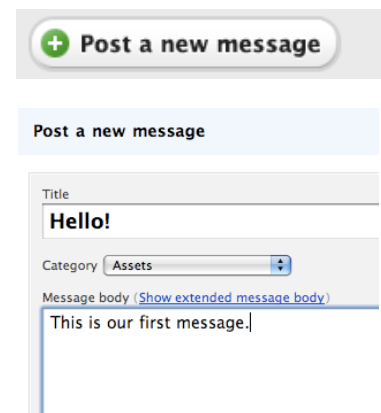
CREATING MESSAGES

You can message all members of a project using the "Messages" function. This function is a great way to make announcements to all project members.

To do this, simply click the Messages tab, and then click "Post a new message" button.

You will then see the text boxes appear where you can enter the message of your choice.

Finally, messages will appear in in the "All Messages" tab from in descending order as shown below:



ADDING TO-DO'S

To-Do's are considered the individual project items needed to complete a milestone, and subsequently, a project. You can create, order, and designate To-Do's to the people you just created by clicking the "To-Do" tab and then clicking "New To-Do List".

To-Do list creation happens in several steps:

First, you create the list name and description. For this example, we will choose "Phase 1" as the title and "Minor Adjustments: Laying the Groundwork" for the description.

Second, you add the individual items and designate who is responsible for them. The task "Plan, develop, and initially implement Web 2.0-based networks" is assigned to Clint Morrow. Clicking "Save this item" will submit the to-do list. Continue to do this until your first list has been fully created.

When you are done entering to-do items, they will appear underneath the "To-Do" tab as shown below:



New to-do list

First give the list a name (eg. "Things for the meeting")

Phase 1

Optional features

List description or notes about this list

Minor Adjustments: Laying the Groundwork

Create this list or Cancel

Plan, develop, and initially implement Web 2.0-based networks

Who's responsible?

Me (Clint Morrow)

Save this item or Cancel

To-do lists

Phase 1

Minor Adjustments: Laying the Groundwork

- Clint Morrow: Plan, develop, and initially implement Web 2.0-based networks
- Clint Morrow: Train and encourage management / staff to fully embrace and utilize Web 2.0
- Kyle West: Create staff checklist
- Achieve high Twitter, Facebook, MySpace (optional) usage among staff

Enter a to-do item

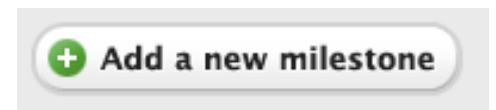
Who's responsible?

Anyone

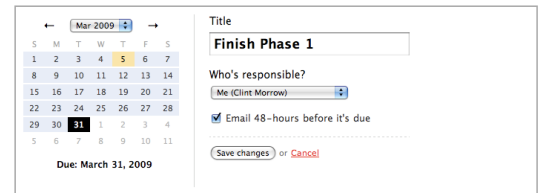
Add this item or I'm done adding items

ADDING MILESTONES

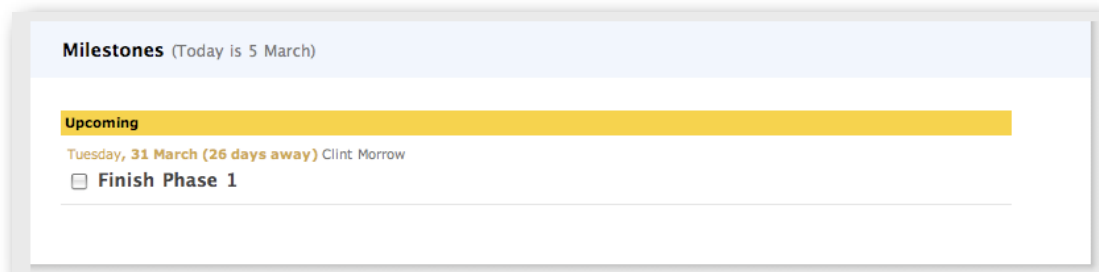
Milestones are a great way to track major achievements in project progression. Underneath the “Milestones” tab, you can create and set a milestone by clicking “Add a milestone”.



For this example, we will set the “Finish Phase 1” milestone to be due on March 31, 2009. You can also have the option to set who is responsible for finishing the milestone. It can be one, or many different people. In addition, you can optionally set Basecamp to auto-notify those responsible 48-hours before due date.



After you have set your milestone settings, it will appear below the “Milestones” tab as shown below:



TRACKING YOUR PROJECT

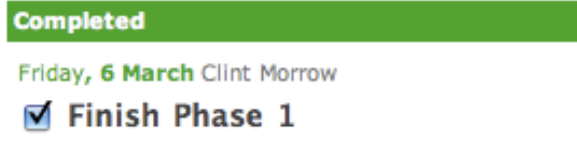
Obviously, using Basecamp requires planning on your part. However, a successful project is one that is tracked carefully and organized. Using the functions of Basecamp noted above, tracking these To-Do's and Milestones has become much easier.

To-Do and Milestone Progress

Completing To-Do's and Milestones is as simple as checking off the boxes when they are done.



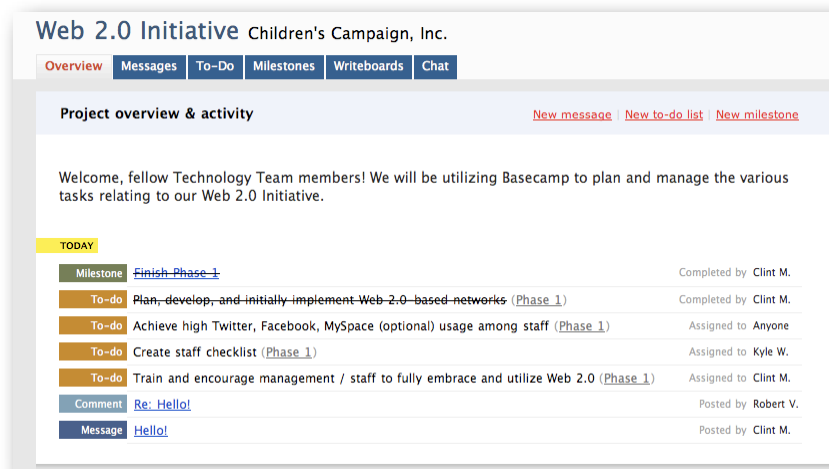
Completed To-Do's are shown greyed out to signify completion.



Completed Milestones change from a status of "yellow" to "green"

Overall Progress

An overall view of the project status can be found on the "Overview" tab. It quickly shows the status of Milestones, To-Do's, Comments, Messages, and all other activity that has recently happened on the Basecamp site.




COMPLETING A PROJECT

A completed project in Basecamp is simply one that has all To-Do's and Milestones marked as completed. It's as simple as that. Now that you have completed your first project, I suggest sending a message to your team congratulating them on their success!

TODAY		
To-do	Achieve high Twitter, Facebook, MySpace (optional) usage among staff (Phase 1)	Completed by Clint M.
To-do	Create staff checklist (Phase 1)	Completed by Clint M.
To-do	Train and encourage management / staff to fully embrace and utilize Web 2.0 (Phase 1)	Completed by Clint M.
Milestone	Finish Phase 1	Completed by Clint M.
To-do	Plan, develop, and initially implement Web 2.0 based networks (Phase 1)	Completed by Clint M.

Alternatively, you can specify to delete a project by navigating to the “Project settings” page in the top right corner of any screen.

[Project Settings](#) | [My Info](#) | [Log-out](#) [HELP](#)



Then simply click “Yes, I understand - delete this project”. Proceed with caution!

Delete this project?

Deleting a project **immediately and permanently deletes** all the data associated with this project (messages, milestones, to-do lists, files, writeboards, etc). **There is no Undo** so make sure you're absolutely sure you want to delete this project.

[Yes, I understand — delete this project](#)

Conclusion

In conclusion, Basecamp is a powerful project management solution that is both efficient and easy-to-use. Unlocking the power of Web 2.0 affords a much higher level of interactivity an communication than ever before.

To recap, you should now be able to successfully do the following:

- Create a Project in Basecamp
- Create and Manage Users in Basecamp
- Effectively Use Basecamp to Manage Projects Using To-Do's, Milestones

If you have any additional questions, please contact Clint Morrow at:

clint.morrow@gmail.com or visit his website at www.clintmorrow.com.

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Kennedy, Dennis M. (2008). The lawyer's guide to collaboration tools and technologies: Smart ways to work together. Chicago: ABA, Law Practice Management Section.

Metz, Cade. (2004). Basecamp. PC Magazine. Retrieved January 29, 2009, from <http://www.pcmag.com/article2/0,2817,1634172,00.asp>.