



Basecamp Project Docs & Files Organization-Maintenance

Prepared by: ASHRAE Communications Committee

Approved for Distribution: 6/13/2020

1) Where to put and find files in your Project.

a) Put a document in only one location - do not duplicate.

- i) If a draft document being worked on is in one of the other folders, put a brief **note** in the 'YEAR' folder or the meeting folder telling where a file (eg: working draft for a guidance doc) is located.
- ii) The top level of the project "Docs & Files" should usually need only a few active folders as identified in b-e following. The objective is to keep the top level as uncluttered as possible and to allow easier year end maintenance. Some projects may find a need for additional folders. Other folders and files are placed within one of these main folders.

b) This YEAR (current fiscal year)

- i) This folder is created at the beginning of the fiscal year. Its title designates the year (ex: 2019-2020)
- ii) Agendas, minutes, subcommittee notes, associated power points for that meeting, all go in this folder or subfolders for material used during the year. Remember, material being created for Operations or Tools & Resources reside in those folders with a note pointing to the location.
- iii) The "old" current year automatically becomes "Last YEAR"
- iv) Use subfolders to identify major activities within the year (ex: 2020-Winter Meeting)

c) Last YEAR (immediate past fiscal year)

- i) This folder only contains the information added in the previous year. Nothing is added to this folder.
- ii) The year before should have been reviewed by the committee vice chair and archived within the Basecamp project. (Note: Archived folders are always available if past information is needed. They can be found at the bottom of the project.)

d) OPERATIONS (Governing docs)

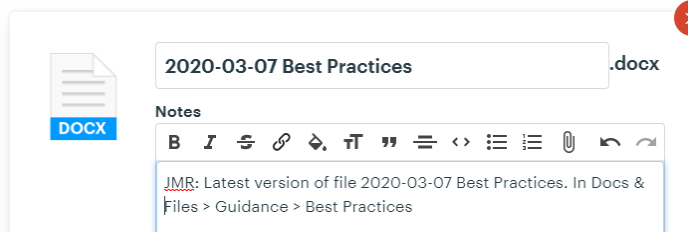
- i) Anything that is overarching governing documents or resource documents for committee members goes in this folder
- ii) These will be documents that persist from year to year and do not change regularly (ex: MOP, Reference Doc, Strategic Plan, or Reimbursement info)

e) TOOLS & RESOURCES (Guidance docs)

- i) Instructions, training and guidance material the committee makes for themselves or other groups goes in this set of folders. Material placed in this set of folders/subfolders should be independent of the year in which they were generated and may span more than one committee year.
- ii) Drafts of new material are started in this folder regardless of the year started. Put a note in the year folder or meeting folder to show the file location so that it is easy to find while being worked on. Do NOT make a separate copy of the file – everything has only one place to be.

Review and add any extra details

Review the new version below and add any notes before publishing.



- iii) This includes all training material and documents that are applicable to persons inside or outside the committee regardless of the year started.

2) Working with Files

a) File Name

- i) Keep the file name short, practical and descriptive
 - (1) People may search for this file in the future. Is it a "How to?". Is it training?
- ii) DO NOT put the date or the author's initials in the filename. Basecamp tracks this information.
- iii) It is a good idea to embed the date within the file, particularly if the file can become date sensitive in the future. If the file type doesn't support this, add the date manually).
- iv) Working docs are marked as draft. Newer versions are uploaded over older ones. DO NOT start a new file upload.
- v) Final docs are marked as final. The final draft is uploaded over the accumulated draft versions.
 - (1) DO NOT start a new file upload. All prior drafts will then be available underneath the final.

b) File Types-

i) Native files (.docx, .pdf, .xlsx, .pptx, .jpg, etc)

- (1) Post in the proper folder. DO NOT attach as part of a message or as an attachment to a comment. Instead, post the native file in the appropriate place and add a comment about what is required in the 'notes' before you upload. Notify the appropriate committee members. This identifies the location and the desired action.

ii) Start a new doc (in any folder, click "NEW" then 'start a new doc')

- (1) This feature is helpful for any text-based information that is only intended to make the information in the folder clear. This is not a something that can be downloaded and changed but only exists within the folder. Do not use this to start development on a document that is to be used outside the folder or is to be reviewed by others.
- (2) Notes are a simple tool, helpful for subcommittee agendas and minutes.

- (3) DO NOT use Notes for anything where native file editing between committee members is requested. Make that request when posting the native file.
- c) **Collaboration on a File**
- i) Edits by anyone are ALWAYS made in the working file and not in a Basecamp comment or message.
 - ii) Download the file and make the changes.
 - (1) Use "track changes" whenever possible, highlight the edits if not available.
 - iii) Upload the changes to the original file using "Replace with a new version".
 - (1) Before uploading, modify the "Note" by adding "Revised *-the date -your initials*" on the FIRST line of the notes section so the latest revision date is always on the first line if more than one.
 - iv) Previous versions of the file are accessible by clicking on "See all versions" below the filename.
- 3) Project Maintenance**
- a) The "Current Year" folder becomes "Last Year" and a new YEAR folder is created.
 - b) Archive the 2nd previous year (old Last Year folder) on July 1.
 - i) For example, 2019-2020 (Current) and 2018-2019 (Immediate past year) should be the only two folders active.
 - ii) In the Spring, the Vice Chair creates the folder for the next year.
- 4) Membership-**
- a) Members of the Basecamp project should be updated twice.
 - i) About May 15 to add incoming members to the committee, so they can get their bearings before the annual conference and prior to their term starting.
 - (1) All new members need to be invited to join the project.
 - (2) Be sure to confirm the email address that they wish to use ensure that they can see all of the Basecamp projects they are members of with the same login.
 - ii) No later than July 15 remove members that are rolling off and any who should no longer have access to the project. Be sure to check first as this may differ based on the type of project (e.g.: Region, Chapter, TC, standing committee, etc.)