Clientside Overview

Prepared By: ASHRAE Communications Committee
Approved for Distribution: 2019

CLIENTSIDE IN BASECAMP 3 PROJECTS

WHAT IS CLIENTSIDE?

People can have one of two designations in a Basecamp Project. They can either be a Project Team Member, or, they can be a Clientside Member. The intent of the two designations is to delineate people (Project Team Members) that need access to all files (including working files, historical files, etc.) from people (Clientside Members) who only need to see or review a finalized file.

Within Basecamp, Project Team Members are referred to as **team members** while Clientside Members are referred to as **clients**.

A user (identified by an e-mail address) cannot be both a client and project team member on the same project.

WHY CLIENTSIDE?

BOTTOM LINE FIRST: If a person needs and is authorized to access EVERYTHING (no exceptions) in "Your Basecamp Project" then they MUST BE a project team member and not a client. The version of Clientside ASHRAE uses allows only email messages to be sent to clients. Files from the Basecamp Project can be attached directly to client emails.

When there is a relatively constant set of people you want to send emails to and receive comments on the email from but are not team members of "Your Basecamp Project" and not entitled to see information inside "Your Basecamp Project" unless specifically sent to them, the Clientside is a great option.

· As an example, Council officers (they change each year) whom you might send information to but who do not need free access to all information in "Your Basecamp Project".

Using Clientside ensures that all correspondence with clients is captured and available to all team members of the project even after the person initiating the message is no longer a project member. This way, current team members can review all past communications by the committee.

Clientside is useful when there are positions (with an @ashrae.org email alias) who need email notifications about committee business, and the people occupying those positions change regularly. Your committee liaison for example.

ENABLING CLIENTSIDE

- To enable the Clientside on a project, click on "Add/Remove people" then select "Add people" and from there choose "The Client". Next, Basecamp will ask you to choose which method you'd like to use. It's very important to choose the "old" way.
    - o Users cannot be both team members of "Your Basecamp Project" and clients. If a user is currently designated as a client on the Clientside, they must first be removed as a client before being added as a team member.
    - o Note that people may be clients of "Your Basecamp Project" and members of a different project you belong to at the same time.
    - o While you might think that a staff liaison, TAC section head, RAC or Standards liaison should be a team member of "Your Basecamp Project", they (using the position alias) should be a client of "Your Basecamp Project". This is because they normally do not need access to all information inside the project – simply emailing them specific information is normal.

CLIENTSIDE DO'S AND DON'T'S

- **DO:** You should ALWAYS use the ASHRAE alias instead of a personal email address so that the messages are routed to the current person (ASHRAE staff, officers or committee officers for example). For example, Tech Council Chair would be "TechCchair@ashrae.net" and not the person's email address.
    - o The list of aliases can be found on ashrae.org when you search for "position alias list". The pass-through address for each alias is updated by staff annually or more frequently based on ASHRAE's member database. Staff can create an email group using aliases to assist in streamlining Project communication upon request (all TC chairs for example).
    - o Alias use avoids having to change the email list every time a person in that position changes and reserves the personal email address if the person needs to become a Project team member later.
- **DON'T:** Use Clientside for voting or non-voting members of the committee.
- **DON'T:** Get hung up on the idea that only voting members of a committee should be project team members. Remember: the difference between team members and clients on Basecamp is all about how much access someone needs to a Project's files.
    - o Anyone who needs to see all document and interactions of committee members need to be **team members** of the project. They must be team members of "Your Basecamp Project" otherwise they will not be able to see information and interactions of the committee members with the project.

EMAILNG CLIENTS

· When you start composing an email, you can choose which clients receive it. By default, all clients are selected but you can un-select any ones you need to. You will also be able to "cc" any project team members.
  o Sending Attachments
    ▪ You can send email messages to clients with attachments that are in 'Docs & Files' within "Your Basecamp Project". The attachment will not include comments or past versions - it is a static copy at the time of transmission.
    ▪ You can drag files from your computer, and they will be attached to the email or you can click on the 'paperclip' and it will open an explorer window to your computer to find the attachment(s).
  o If you need to delete a draft without sending it to anyone you have to go to "My Stuff" at the top of the screen, choose "my drafts" and delete the one you want. Be careful, there is no going back if you delete the wrong one.
  o If a client sends an email directly to you outside of "Your Basecamp Project", just forward it to "client@3.basecamp.com." If you are a member of more than one project, you will be sent a return email and asked which project Clientside to put it in.
  o If a client needs to respond to the email, they can just click "reply" and the email will be sent back to "Your Basecamp Project".
  o There is a "pin" number in the upper right corner when you are composing an email to a client. Normally, you will not need this. However, if you expect the client to need to reply "within Your Basecamp Project" then they will have to have that number – you will need to include it in your email to them.

Questions on the Clientside? Contact eccstaff@ashrae.net

More information on Basecamp Use within ASHRAE can be found at
https://www.ashrae.org.basecampguidance