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## **Coveo Platform 7.0**

### Basecamp Connector Guide

## Notice

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# 1. Basecamp Connector

CES 7.0.7914+ (October 2015)

The Coveo connector for Basecamp allows Coveo administrators to index and integrate the content of a Basecamp account into the Coveo unified index. The connector indexes all items from a Basecamp account so that in the Coveo search interfaces, a user can easily find Basecamp content.

## 1.1 Features

The Basecamp connector features are:

### Content indexing

Extraction and indexing of the following Basecamp item types:

- Account
- Projects
- Documents
- Email forwards
- Messages (standalone discussions)
- To-do lists
- Uploads (stand-alone files)
- To-dos
- Attachments

**Note:** The connector also supports Google Docs attachments.

- Comments

**Note:** Calendars and calendar events are not yet indexed.

### Multithreading

The connector can run multiple threads, which can improve performances considerably.

### Pause/Resume

When indexing Basecamp content, the connector can be paused and resumed.

## 1.2 Limitations

- The connector does not yet support Basecamp permissions.

**Important:** In the Coveo search interface, a user searching Basecamp content could see content to which he has normally no access in Basecamp. Thus, it is currently highly recommended to only index Basecamp account with public content.

- A full refresh is needed to retrieve the latest items modifications (addition, edition, deletion).

### What's Next?

Review the steps to deploy the Basecamp connector (see "[Basecamp Connector Deployment Overview](#)" on page 3).

## 2. Basecamp Connector Deployment Overview

The following procedure outlines the steps needed to deploy the Basecamp connector. The steps indicate the order in which you must perform configuration tasks on both the Basecamp and Coveo servers.

To deploy the Basecamp connector

1. Validate that your environment meets the requirements (see ["Basecamp Connector Requirements" on page 4](#)).
2. (When you want the connector to retrieve your Basecamp content using OAuth 2.0 - recommended method) On the Basecamp server, create an application to authorize the Coveo connector to access your Basecamp content (see ["Authorizing the Coveo Connector to Access Your Basecamp Content" on page 5](#)).
3. On the Coveo server, in the Coveo Administration Tool:
  - a. (When you want to retrieve your Basecamp content using Basic authentication - not recommended) Configure a user identity.

The connector needs to know the credentials of an administrator Basecamp account by creating a CES user identity that you will later associate to your Basecamp source.

- b. Create a Basecamp field set to take advantage of the available Basecamp metadata.
  - i. It is recommended to start by importing the default Basecamp field set file (`[CES_Path]\Bin\Coveo.CES.CustomCrawlers.Basecamp.FieldSet.xml`) to create fields for all the metadata available by default from Basecamp items.
  - ii. When you created custom metadata for your Basecamp items, add corresponding fields to the field set.
- c. Configure and index a Basecamp source.

The connector must know details to access and index the Basecamp content of your managed users (see ["Configuring and Indexing a Basecamp Source" on page 9](#)).

- d. If you encounter issues, verify if modifying the default value of hidden source parameters can help resolve the problems (see ["Modifying Hidden Basecamp Source Parameters" on page 14](#)).

### 3. Basecamp Connector Requirements

Your environment must meet the following requirements to be able to use the Basecamp connector:

- [CES 7.0.7914+ \(October 2015\)](#)
- Coveo license for the Basecamp connector

Your Coveo license must include support for the Basecamp connector to be able to use this connector.

- A valid admin Basecamp account

Using an administrator Basecamp account, you must create a Basecamp app and an OAuth 2.0 protocol to authorize Coveo to access the content of your Basecamp account (see [Authorizing the Coveo Connector to Access Your Basecamp Content](#)).

#### What's Next?

Grant Coveo access to the content of your Basecamp account by creating a Basecamp application (see "[Authorizing the Coveo Connector to Access Your Basecamp Content](#)" on page 5).

## 4. Authorizing the Coveo Connector to Access Your Basecamp Content

You can grant the Coveo connector access to your Basecamp account content using basic authentication. It is however recommended for security (does not involve passwords) and better performance to perform the complete OAuth 2.0 protocol.

The OAuth 2.0 protocol is a protocol used for granting access to external applications without exposing the user's real credentials. For the connector to be able to connect to the content of your managed users, it must acquire a client ID, a client secret and a refresh token.

To authorize the Coveo connector to access your Basecamp content

**Note:** This topic describes a procedure using [Google Chrome](#) and the [Advanced Rest Client](#) extension. However, it can be done with other browsers and extensions, such as [Firefox](#) and the [RESTClient](#) plugin.

1. Create an application using an Basecamp administrator account:
  - a. Access [Your Applications](#) page.
  - b. Log into your Basecamp account with an administrator account.
  - c. In the **Your Applications** page, click **Register one now**.
  - d. In the **New application** page:
    - i. In the **About Your application** section:
      - A. In the first box, enter the **Name of your application**.

**Example:** Coveo Connector
      - B. In the second box, enter **Your company's name**.
      - C. In the third box, enter **Your website URL**.
    - ii. In the **Integration** section, select the **Basecamp** check box.
    - iii. In the **OAuth 2 authorization** section, in the **Redirect URI**, enter `https://127.0.0.1`.
    - iv. Click **Register this app**.
  - e. Back in the **Your Applications** page:

## Your Applications

Register to integrate your application with Basecamp, Highrise, Backpack, and Campfire. Registered apps can authenticate Basecamp IDs and request authorized access to their accounts.

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### Coveo Connector

Product Access: **Basecamp**

Client ID: **364cafdgy91fc3522b3e0e561bfc83ffc68bbc**

Client Secret: **c99a1fc4f4de14fjk379275cf17e3ff4f46a30e9**

Redirect URI: <https://127.0.0.1>

[Preview authorization dialog](#)

Register Another Application

i. Take note of the following values:

- **Client ID**
- **Client Secret**

You need this value when configuring the Basecamp source (see "[Configuring and Indexing a Basecamp Source](#)" on page 9).

ii. Click **Preview authorization dialog**.

f. In the **Integrate with [Your App Name]** page, click **Yes, I'll allow access** to receive an authorization code from Basecamp.

g. In your browser address bar, take note of the authorization code returned by the Basecamp API.

**Important:** An authorization code can only be used once before it expires.

**Example:** `https://127.0.0.1/?code=[AUTHORIZATION_CODE]`

h. Make an API call for an access token and an refresh token:

i. Access the [Advanced REST client](#) Google Chrome extension page, and then click the **+ Free** button.

**Note:** You are asked to download Google Chrome if you did not have the browser installed on your computer already.

- ii. In the **Confirm New App** dialog box, click **Add**.
- iii. In the **Apps** page, open the **Advanced REST client** plugin.
- iv. In the **Request** tab:

The screenshot shows the 'Advanced Rest Client' interface. The URL is set to `https://launchpad.37signals.com/authorization/token`. The method is set to **POST**. The 'Payload' tab is selected, showing a form with the following fields:

Key	Value
type	web_server
code	774a54f9
client_id	364cafdgy91fc3522b3e0e561bfc83ffc68bbc
client_secret	c99a1fc4f4de14fjk379275cf17e3ff4f46a30e9
redirect_uri	https://127.0.0.1/

The content type is set to `application/x-www-form-urlencoded`. Buttons for 'Clear' and 'Send' are visible at the bottom right.

- i. In the **URL** box, enter `https://launchpad.37signals.com/authorization/token`.
- ii. In the method list, select the **POST** check box.
- iii. Next to **Payload**, select **Form**.
- iv. In the box under **Payload**, enter the following keys and values:

Keys	Values
type	web_server
code	The authorization code you retrieved previously (see <a href="#">Authorization Code</a> ).
client_id	The client ID obtained from the application configuration (see <a href="#">Client ID</a> ).
client_secret	The client secret obtained from the application configuration (see <a href="#">Client Secret</a> ).
redirect_uri	<code>https://127.0.0.1</code>

- v. Click **Send** to receive an answer.
- v. At the bottom of the page, in the **Response** box, take note of the refresh token value. You need this

value when configuring your Basecamp source (see [Configuring and Indexing a Basecamp Source](#)).

### What's Next?

Create a Basecamp source ("[Configuring and Indexing a Basecamp Source](#)" on page 9).

## 5. Configuring and Indexing a Basecamp Source

A source defines a set of configuration parameters for a specific Basecamp account.

To configure and index a Basecamp source

1. On the Coveo server, access the Administration Tool.
2. Select **Index > Sources and Collections**.
3. In the **Collections** section:
  - a. Select an existing collection in which you want to add the new source.

OR

  - b. Click **Add** to create a new collection.
4. In the **Sources** section, click **Add**.

The **Add Source** page that appears is organized in three sections.

5. In the **General Settings** section of the **Add Source** page:

The screenshot shows the 'Add Source' configuration page for a Basecamp collection. The page is titled 'COLLECTION: BASECAMP - ADD SOURCE' and includes a 'Help' button. The 'General Settings' section contains the following fields:

- Name:** Basecamp
- Source Type:** Basecamp
- Addresses:** http://www.basecamp.com
- Rating:** Normal
- Document Types:** Default
- Active Languages:** Default
- Fields:** Basecamp field set
- Refresh Schedule:** Every day

- a. Enter the appropriate value for the following required parameters:

### Name

Enter a descriptive name of your choice for the connector source.

**Example:** Basecamp

### Source Type

Select the connector used by this source. In this case, select **Basecamp**.

**Note:** If you do not see **Basecamp**, your environment does not meet the requirements (see "[Basecamp Connector Requirements](#)" on page 4).

### Addresses

This parameter does not apply to this source, but cannot be left empty.

**Example:** `https://www.basecamp.com`

### Fields

Select the field set that you created earlier (see [Basecamp Connector Deployment Overview](#)).

### Refresh Schedule

Time interval at which the index is automatically refreshed to keep the index content up-to-date. By default, the **Every day** option instructs CES to refresh the source everyday at 12 AM.

- b. Review the value for the following parameters that often do not need to be modified:

### Rating

Change this value only when you want to globally change the rating associated with all items in this source relative to the rating to other sources.

**Example:** When a source replaces a legacy system, you may want to set this parameter to **High**, so that in the search interface, results from this source appear earlier in the list compared to those from legacy system sources.

### Document Types

If you defined a custom document type set for this source, select it.

### Active Languages

If you defined custom active language sets, ensure to select the most appropriate for this source.

6. In the **Specific Connector Parameters & Options** section of the **Add Source** page:

### Specific Connector Parameters & Options

Account ID	<input type="text" value="3027985"/> ?
Client ID	<input type="text" value="364cafd91fc3522b3e0e964bfc83ffc68t"/> ?
Client Secret	<input type="password" value="....."/> ?
Refresh Token	<input type="password" value="....."/> ?
Mapping File	<input type="text" value="Coveo.CES.CustomCrawlers.Basecamp.MappingFile.xml"/> ... ?
Index Project Drafts	<input type="checkbox"/> ?
Index Archived Projects	<input checked="" type="checkbox"/> ?
Parameters	Add Parameter ?
Option	<input checked="" type="checkbox"/> Index subfolders ? <input type="checkbox"/> Index the document's metadata ? <input type="checkbox"/> Document's addresses are case-sensitive ? <input checked="" type="checkbox"/> Generate a cached HTML version of indexed documents ? <input type="checkbox"/> Open results with cached version ?

- a. Using the following parameters, authorize the Coveo crawler to access the content of your Basecamp account:

#### Account ID

Enter your Basecamp account ID.

**Note:** After you login to Basecamp, the account ID can be found in the browser address bar after `https://basecamp.com/`.

**Example:** `https://basecamp.com/3027985/`

#### Client ID

(For OAuth 2.0 only) Enter the client identifier to use that you previously obtained (see [Authorizing the Coveo Connector to Access Your Basecamp Content](#)).

#### Client Secret

(For OAuth 2.0 only) Enter the client secret to use that you previously obtained (see [Authorizing the Coveo Connector to Access Your Basecamp Content](#)).

#### Refresh Token

(For OAuth 2.0 only) Enter the refresh token to use that you previously obtained (see [Authorizing the Coveo Connector to Access Your Basecamp Content](#)).

- b. In the **Mapping File** box, the path to the default mapping file that defines how the connector handles metadata often does not need to be changed.
- c. The following options must be selected for more content in Basecamp to be indexed.

### Index Project Drafts

Whether the project drafts should be indexed. By default, archived projects are indexed.

### Index Archived Projects

Whether the archived projects should be indexed. By default, archived projects are indexed.

- d. (Optional) Click **Add Parameter** when you want to show and change the value of advanced source parameters (see "[Modifying Hidden Basecamp Source Parameters](#)" on page 14).
- e. The **Option** check boxes generally do not need to be changed:

### Index Subfolders

This parameter is not taken into account for this connector.

### Index the document's metadata

When selected, CES indexes all the document metadata, even metadata that are not associated with a field. The orphan metadata are added to the body of the document so that they can be searched using free text queries.

When cleared (default), only the values of system and custom fields that have the **Free Text Queries** attribute selected will be searchable without using a field query.

**Example:** A document has two metadata:

- `LastEditedBy` containing the value `Hector Smith`
- `Department` containing the value `RH`

In CES, the custom field `CorpDepartment` is bound to the metadata `Department` and its **Free Text Queries** attribute is selected.

When the **Index the document's metadata** option is cleared, searching for `RH` returns the document because a field is indexing this value. Searching for `hector` does not return the document because no field is indexing this value.

When the **Index the document's metadata** option is selected, searching for `hector` also returns the document because CES indexed orphan metadata.

### Document's addresses are case-sensitive

Leave the check box cleared. This parameter needs to be checked only in rare cases for systems in which distinct documents may have the same name but different casing.

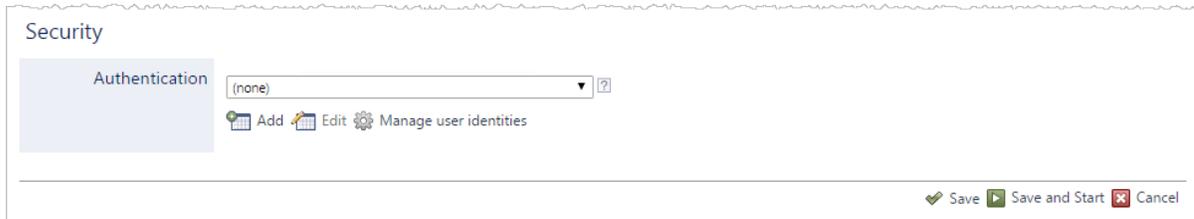
### Generate a cached HTML version of indexed documents

When you select this check box (recommended), at indexing time, CES creates HTML versions of indexed documents. In the search interfaces, users can then more rapidly review the content by clicking the **Quick View** link rather than opening the original document with the original application. Consider clearing this check box only when you do not want to use **Quick View** links or to save resources when building the source.

**Open results with cached version**

Leave this check box cleared (recommended) so that in the search interfaces, the main search result link opens the original document with the original application. Consider selecting this check box only when you do not want users to be able to open the original document but only see the HTML version of the document as a **Quick View**. In this case, you must also select **Generate a cached HTML version of indexed documents**.

7. In the **Security** section of the **Add Source** page:



**Important:** The connector does not yet support Basecamp permissions. It is thus strongly recommended to only index Basecamp account with public content.

**Note:** A workaround is to manually define permissions on the source (see [Permissions](#)).

a. In the **Authentication** drop-down list, depending on your setup:

- When you grant the connector access to your Basecamp content using OAuth, select **(none)**.
- When you want to grant the connector access to your Basecamp content using Basic authentication, select the user identity you previously created (see [Basecamp Connector Deployment Overview](#)).

8. Click **Save** to save the source configuration.

9. When your Basecamp content is all public:

**Important:** The connector does not yet support Basecamp permissions. This means that, in the Coveo search interface, a user searching Basecamp content could see content to which he has normally no access in Basecamp.

**Note:** When your Basecamp content is not public, a workaround is to enter the name of user(s) or group(s) you want to allow or deny access to your organization content in the **Allowed Users** and **Deny Users** boxes.

a. In the navigation panel on the left, click **Permissions**.

b. In the **Permissions** page, select **Specify the security permissions** to index.

c. In the **Allowed Users** and **Denied Users** boxes, enter the users and groups that you respectively want to allow or deny to see search results from this source. The default is to allow `everyone \S-1-1-0\` (Active Directory Group).

d. Click **Apply Changes**.

10. When you are ready to start indexing the Basecamp source, click **Rebuild**.

11. Validate that the source building process is executed without errors:
    - In the navigation panel on the left, click **Status**, and then validate that the indexing proceeds without errors.
- OR
- Open the CES Console to monitor the source building activities.

## What's Next?

Set an incremental refresh schedule for your source.

Consider modifying some hidden source parameters to try resolving other issues (see ["Modifying Hidden Basecamp Source Parameters" on page 14](#)).

## 5.1 Modifying Hidden Basecamp Source Parameters

The **Add Source** and **Source: ... General** pages of the Administration Tool present the parameters with which you can configure the connector for most Basecamp setups. More advanced and more rarely used parameters are hidden. You can choose to make one or more of these parameters appear in the **Add Source** and **Source: ... General** pages of the Administration Tool so that you can change their default value. Consider changing values of hidden parameters when you encounter issues.

The following list describes the advanced hidden parameters available with Basecamp sources. The parameter type (integer, string, etc.) appears between parentheses following the parameter name.

### **ItemTypesToFold (String)**

Semicolon-separated list of the types of item to fold under their parent. The default value is

`Attachment;Comment;Todo`.

### **AlwaysFoldOnFirstAncestor (Boolean)**

For items without an indexed parent, whether to allow folding them under their first indexed ancestor. The default value is `False`.

## To modify hidden Basecamp source parameters

1. Refer to ["Adding an Explicit Connector Parameter" on page 15](#) to add one or more Basecamp source parameters.
2. For a new Basecamp source, access the **Add Source** page of the Administration Tool to modify the value of the newly added advanced parameter:
  - a. Select **Index > Sources and Collections**.
  - b. Under **Collections**, select the collection in which you want to add the source.
  - c. Under **Sources**, click **Add**.
  - d. In the **Add Source** page, edit the newly added advanced parameter value.
3. For an existing Basecamp source, access the **Source: ... General** page of the Administration Tool to modify the

value of the newly added advanced parameter:

- a. Select **Index > Sources and Collections**.
  - b. Under **Collections**, select the collection containing the source you want to modify.
  - c. Under **Sources**, click the existing Basecamp source in which you want to modify the newly added advanced parameter.
  - d. In the **Source: ... General** page, edit the newly added advanced parameter value.
4. Rebuild your Basecamp source to apply the changes to the parameters.

## 5.2 Adding an Explicit Connector Parameter

Connector parameters applying to all sources indexed using this connector are called explicit parameters.

When you create or configure a source, the Coveo Enterprise Search (CES) 7.0 Administration Tool presents parameters with which you can configure the connector for most setups. For many connectors, more advanced and more rarely used parameters also exist but are hidden by default. CES then uses the default value associated with each of these hidden parameters.

You can however choose to make one or more of these parameters appear in the **Add Source** and **Source: ... General** pages of the Administration Tool so that you can change their default value.

To add an explicit connector parameter

1. On the Coveo server, access the Administration Tool.
2. Select **Configuration > Connectors**.
3. In the list on the **Connectors** page, select the connector for which you want to show advanced hidden parameters.
4. In the **Parameters** section of the selected connector page, click **Add Parameter** for each hidden parameter that you want to modify.

**Note:** The **Add Parameter** button is present only when hidden parameters are available for the selected connector.

5. In the **Modify the parameters of the connector** page:

- a. In the **Type** list, select the parameter type as specified in the parameter description.
- b. In the **Name** box, type the parameter name exactly as it appears in the parameter description. Parameter names are case sensitive.
- c. In the **Default Value** box, enter the default value specified in the parameter description.

**Important:** Do not set the value that you want to use for a specific source. The value that you enter here will be used for all sources defined using this connector so it must be set to the recommended default value. You will be able to change the value for each source later, in the **Add Source** and **Source: ... General** pages of the Administration Tool.

- d. In the **Label** box, enter the label that you want to see for this parameter.

**Example:** To easily link the label to the hidden parameter, you can simply use the parameter name, and if applicable, insert spaces between concatenated words. For the **BatchSize** hidden parameter, enter `Batch Size` for the label.

**Note:** To create multilingual labels and quick help messages, use the following syntax: `<@ln>text</@>`, where *ln* is replaced by the language initials—the languages of the Administration Tool are English (en) and French (fr).

**Example:** `<@fr>Chemin d'accès du fichier de configuration</@><@en>Configuration File Path</@>` is a label which is displayed differently in the French and English versions of the Administration Tool.

**Tip:** The language of the Administration Tool can be modified by pressing the following key combination: Ctrl+Alt+Page Up.

- e. Optionally, in **Quick Help**, enter the help text that you want to see for this parameter when clicking the question mark button  that will appear beside the parameter value.

**Tip:** Copy and paste key elements of the parameter description.

- f. When **Predefined values** is selected in the **Type** parameter, in the **Value** box that appears, enter the parameter values that you want to see available in the drop-down parameter that will appear in the Administration Tool interface. Enter one value per line. The entered values must exactly match the values listed in the hidden parameter description.
- g. Select the **Optional parameter** check box when you want to identify this parameter as an optional parameter. When cleared, CES does not allow you to save changes when the parameter is empty. This parameter does not appear for **Boolean** and **Predefined values** parameter types.
- h. Select the **Sensitive information** check box for password or other sensitive parameter so that, in the Administration Tool pages where the parameter appears, the typed characters appear as dots to mask them. This parameter appears only for the **String** type.

**Example:** When you select the **Sensitive information** check box for a parameter, the characters typed appear as follows in the text box:



- i. Select the **Validate as an email address** check box when you want CES to validate that the text string that a user enters in this parameter respects the format of a valid email address. This parameter appears only for the **String** type.
  - j. In the **Maximum length** box, enter the maximum number of characters for the string. This parameter appears only for the **String** type. When you enter 0, the length of the string is not limited.
  - k. Click **Save**.
6. Back in the **Connector** page, click **Apply Changes**.

The hidden parameter now appears in the **Add Source** and **Source: ... General** pages of the Administration Tool for the selected source. You can change the parameter value from these pages. Refer to the documentation for each connector for details.

**Note:** When you want to modify a hidden source parameter, you must first delete it, and then redefine it with the modified values.