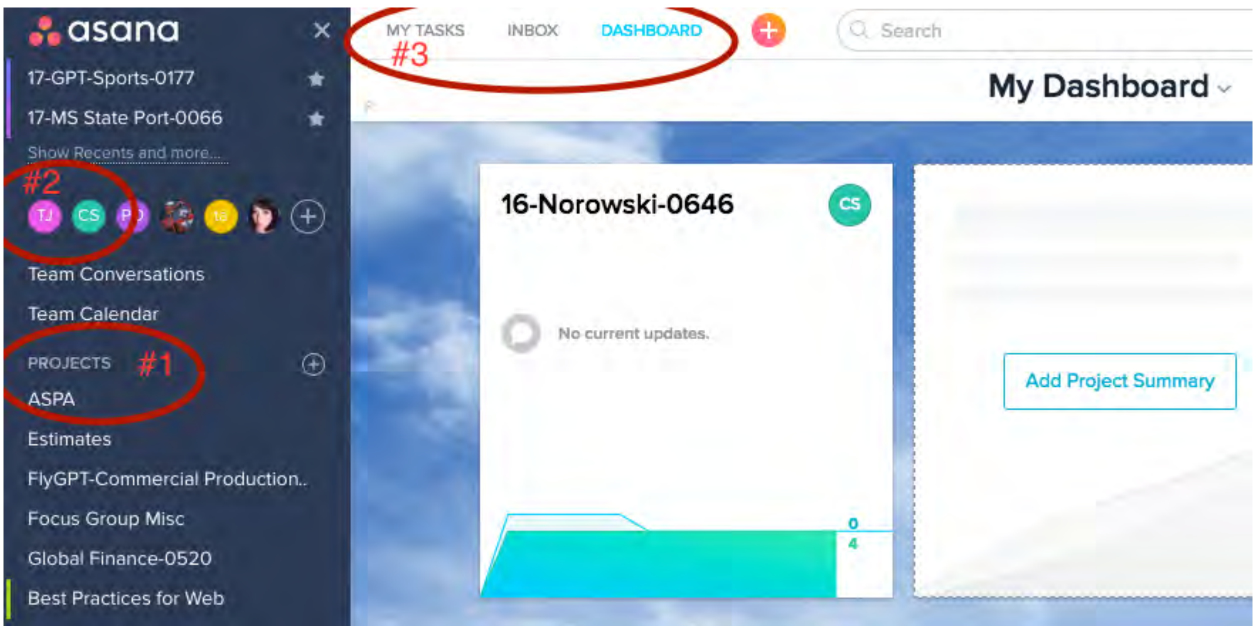
Employee's Guide to Asana

A Quick Introduction

Asana is a task management system that the **Focus Group** creative team uses. The core feature of Asana starts with a project that can be broken down into tasks that can be assigned to a team member. You can set due dates/times on tasks as well as include files, information and comments on the task.

First Thing's First…

Asana is composed of projects **(1)**, team members **(2)**, and your personal space **(3)**.



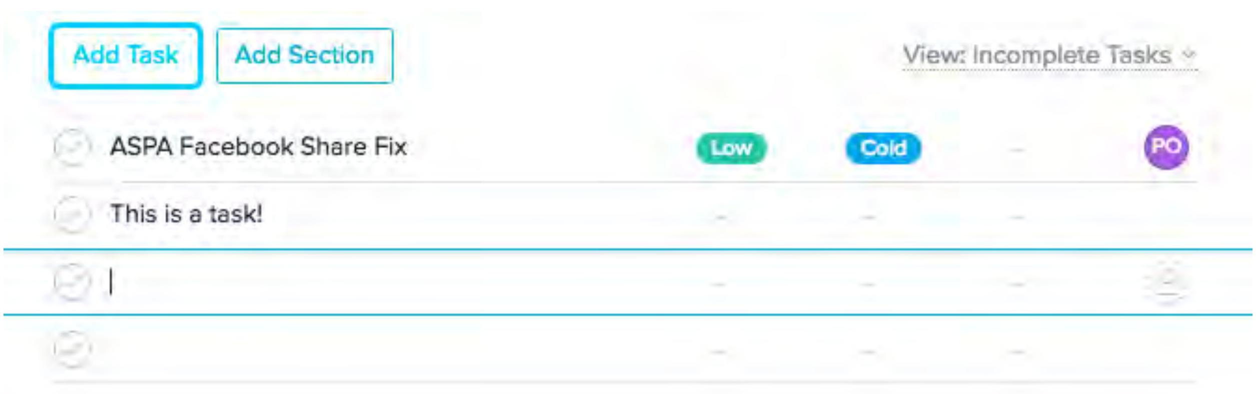
Asana centers around **projects (#1)**. The **Focus Group** organizes them alphabetically and has three project categories. The first category are our templates- they are marked with a green border to the side and are updated as needed. They are not used individually but can be copied for future projects so that the team has a protocol and process for every website project. The next category are our **Ongoing Clients** who routinely gives us work. **Active Projects and Campaigns** are for projects with a start and end date- (important to note that whether its set on a calendar or not, this is understood by everyone). An example would be creating and launching a website or running a digital ad campaign for a client. It starts but eventually is completed. Therefore can be deleted from our projects list once its over.

#2 in the image shows each member of our Asana team. You can click on their profile, assign them a task and see their tasks that have you as a follower or set as public. Everyone can have private tasks that others cannot see unless they set you as a follower of the task.

#3 is much like your team member's task page except for you. There you will see all the tasks that are assigned to you. Let's talk about tasks.

Tasks

To create a task, you simply click the **Add Task** button at the top of your list

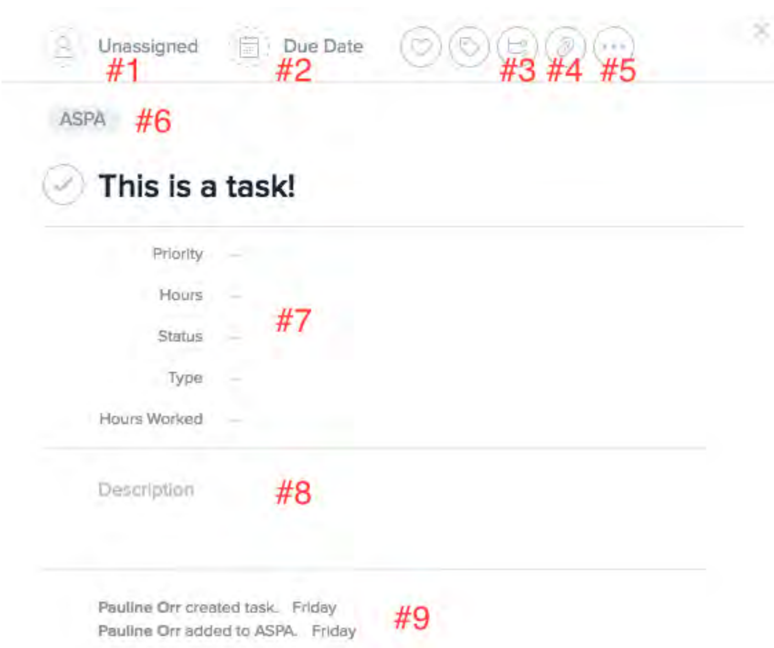


You write what the task is and press "enter" or click again to be finished. When a task is complete, click the check mark. The task will disappear into your archive.
By default, you see **incomplete** tasks. But you can set view to **all tasks** (incomplete and complete) or by project, due date or tasks completed in the past day to three weeks.

Sections and Organization
Before looking more closely at tasks, I want to point out the button **Add Section** in the image above. It appears when your cursor hovers over the **Add Task** button. Sections are very useful for organizing your tasks and projects. They are basically just some text without a check box and in bold text to signify a section in your to do list. Some examples on their uses: I've used them to organize my tasks by **Today**, **Upcoming** and **Later**. Remember, you can click and drag tasks anywhere on your lists and even drag them into another task for it to become a sub-task (more on those later). Dragging tasks to their appropriate sections can be a big help in keeping your list clean and organized.

My organization system can sometimes include other sections called **SLT Meeting Tasks** or **Down Time Tasks**. Other people have used it to organize by the type of tasks or project. Sometimes we get a list of revisions and organize each revision task by sections. Some people do not use them at all. You're free to use these however works for you. We encourage you to play around and see what works for you.

Let's deep dive into each component in a task:



#1 is where you can assign someone to a task just by clicking and choosing which user in the drop down. Tasks can only have one person assigned to it. This is to keep people accountable to tasks.

#2 is where you can set the date the task is due.

You can even set its due **time** or set it as a **recurring tasks** by choosing that option underneath the calendar that pops up when clicking this.

#3 is the sub-task button. You can create a new list within a task. This is another savvy way to organize your tasks. Because, as you know, many tasks can be broken down into smaller tasks.

#4 is where you can attach files to a task. It is important to note that you can find all the files that have been uploaded to a project or your list by going to the project's file page. This is a cheat way to find a list file.

#5 pulls down another list of options that are somewhat self-explanatory. However, worth mentioning is the **mark as waiting on…** feature gives you the option of picking another task as what you are waiting on before the task can be checked off. Creating a follow-up task is just that- creating a task set to come up once this task is checked off.

#6 is the project this task is under. Sometimes this is empty and is set simply to someone's personal to do list. You can add the task to a project simply by hovering for the option in this area and typing/clicking/searching through the list of projects. A task can be included in multiple project lists. Also note, that if you assign your task to a project, followers of that project will now be able to see the task as if it is public to them. Though, they won't be automatically following the task. Simply able to see and access it.

#7 are custom fields and may not be included in every project. A task must be in a project that has custom fields set in order for them to be listed. The Focus Group currently has the following fields: **priority** (ranging from low to high), **hours** (meaning the hours **allotted** to this task), **status** (cold, following up on, waiting on, in progress), **type** (range of type of work, from copywriting to web programming), **hours worked**. The **Focus Group** sets these fields purposefully and invite employees to update tasks especially with its status if applicable on the task. This is a great way for clear communication on tasks. *If a task is missing these custom fields that you think needs it, let us know and we will set it up for you.*

#8 is a place to provide more information on the task.

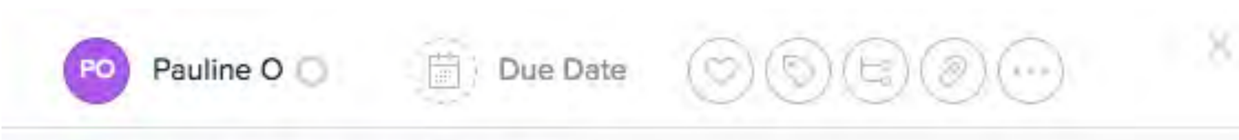
#9 is a record of the task's history. It is a nice way to check when a task is created and what has happened with this task since.

#10 is where anyone can comment on the task. This is a great way for everyone to be on the same page and ask questions.

A great feature to specifically target someone (or a task or project) in a comment is to use the **@ feature**. You type **@** and start writing the name of what it is you're mentioning and it will pull up on a drop down list. This will alert the person mentioned or point people to what you are referring to. Note, mentioning someone in this way will automatically add them as a follower to the task.

For naming tasks, we recommend you keep it clear and concise. "Upload ASPA logos to the server" tells us the client, what logos, what to do and where. If there's more details, simply write it in the task's description. Whereas "Upload to server" is unclear. What logo? What client?

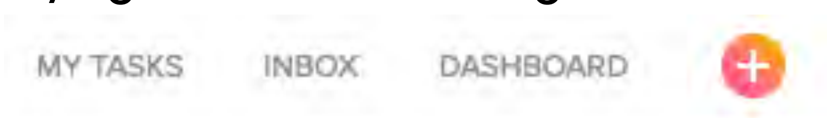
#11 shows who is following the task. You can add followers to the task or take someone off as a follower. Related to followers:



Above, is a task not involved with any project and by default, private to me. I can make it public. This means anyone can see and access this task. It will show up on calendars. If I add a follower, it will only be accessible by that follower and me. If privacy is important, knowing how Asana's privacy settings work is crucial.

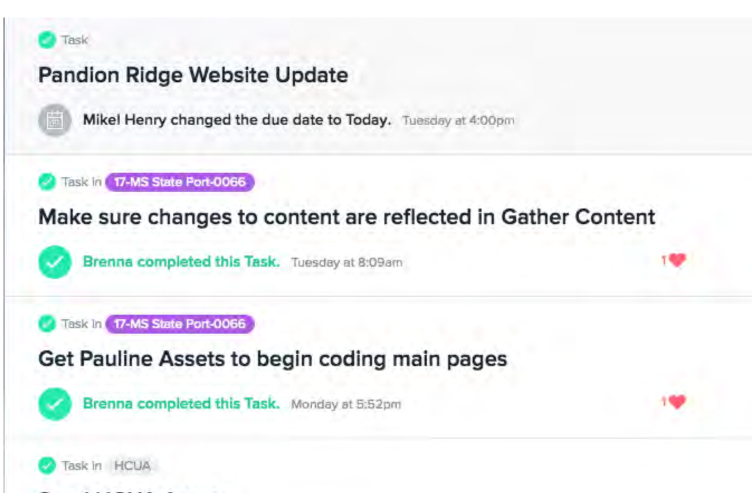
To make it clear, followers will not only be able to access the task but will see any updates within the task in their inbox and notifications. Speaking of inbox…

Staying Informed: Inboxing and Archiving

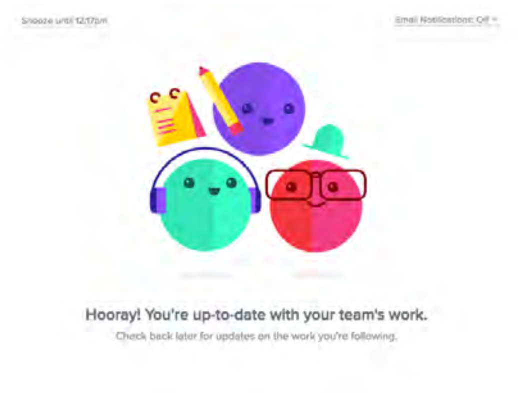


Welcome to your new best friend! The **Focus Group** loves and strongly recommends Asana team members practice inboxing and archiving. We do this because we found email notifications confusing and crowding. And also because the inbox feature just **works**!

You'll find the Inbox right at the top of the screen. Once there, you will see something like this: a list of everything that has happened since you've last checked your inbox of all the tasks you follow or assigned to.



In here you can click on a task and it will pull up to the side. From there you can do whatever you need. Once you are done with being updated with a task, you can click the **X** that shows up when you hover over a task. Hovering on a task will **archive** it. You can find your archive right next to **Activity** link at the top if you need to see your archive list. You can **"X"** off all your tasks or simply click **Archive All**. A fun picture will show up to show you are all up to date.



And that's how you use Asana!

How will you know if there's new information? You will see at the top of your window a orange dot on the Inbox link:

This is your visual cue that there's news. It will go away once you are up to date again. This is a cleaner way to keep you up to date on Asana while keeping your email inbox free of clutter. It does require a commitment to create the Asana inboxing habit.

Speaking of email settings…

Your Personal Settings

You can navigate to your personal settings in the drop down menu by clicking your circle icon to the top right of the screen. **We recommend**

checking off all notifications under "To Email". Check out what else you can personalize in this model while you're here.

Idea Boards

Creatives will probably understand the boards project type if it is described as Asana's version of Trello. It has columns instead of one list where you can create tasks and organize them by dragging them between columns. It is a way the Focus Group can have everything in one place rather than Asana and Trello. To create one, simply click the + sign by projects on the side panel and choose the board style. Give it a clear name- client/project with an indicator as a mood board.

I recommend you go through this on boarding checklist to see how familiar you are now with Asana. Link is:
https://asana.com/guide/resources/checklists/onboarding-checklist

Also, last thing is I recommend you look through Asana's full features list. The link is: https://asana.com/guide/get-started/share/features Additional Features Asana Offers:

Sync your Asana account to your Google Calendar & email yourself tasks How-to: https://youtu.be/JBMghE-9dOI

Get the Asana App:
iTunes Store
https://itunes.apple.com/us/app/asana-team-tasks-conversations/id489969512?mt=8

Google Store
https://play.google.com/store/apps/details?id=com.asana.app&hl=en

Additional How-Tos For Quick Tips

Planning Your Day (2 minutes) - https://youtu.be/UltFHzfjE08

Understanding Asana in A Minute - https://youtu.be/V3WkgVpv1Zk

Creating a Project (1 minute) - https://youtu.be/LO4WmcUdsLo

Task Management (**Recommended**, 1 min) - https://youtu.be/_vwvbgiejhQ

Project Management (1 minute) - https://youtu.be/qqANMTvVp_E

Understanding Asana Capabilities (**Recommended**) - https://asana.com/guide/get-started/share/features

Idea/Mood Boards (1 minute) - https://www.youtube.com/watch?v=jmZaZGydfPY&feature=youtu.be

Everyday Workflow - https://asana.com/guide/resources/info-sheets/everyday-workflows