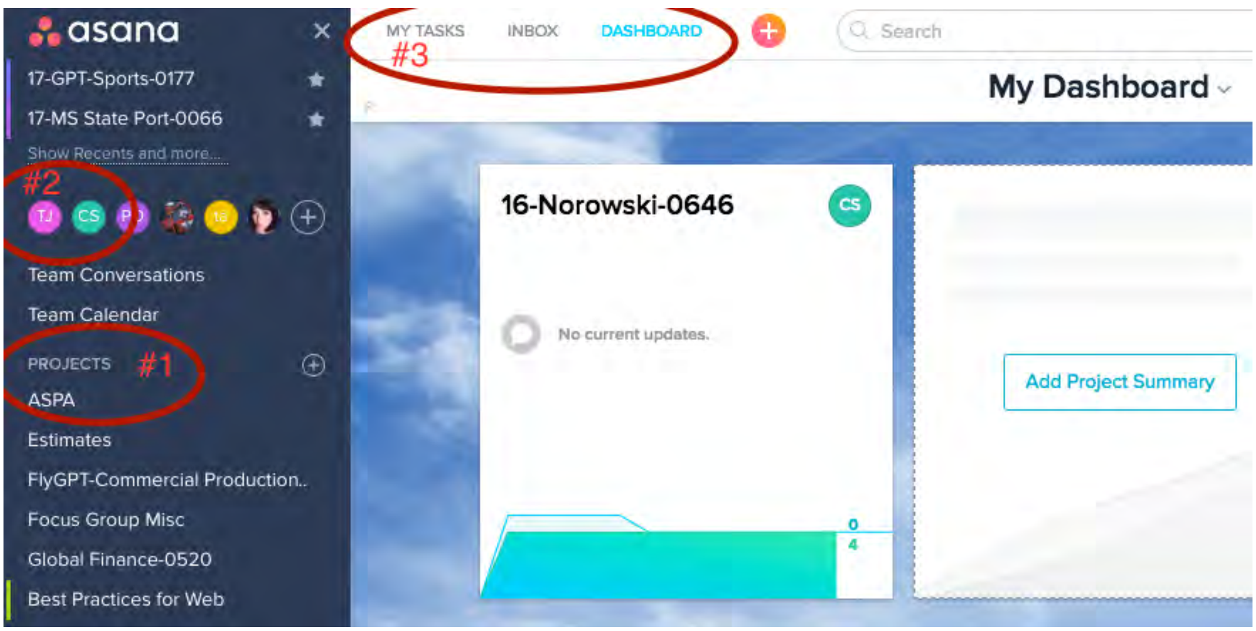
Project Manager's & Traffic's Guide to Asana

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).



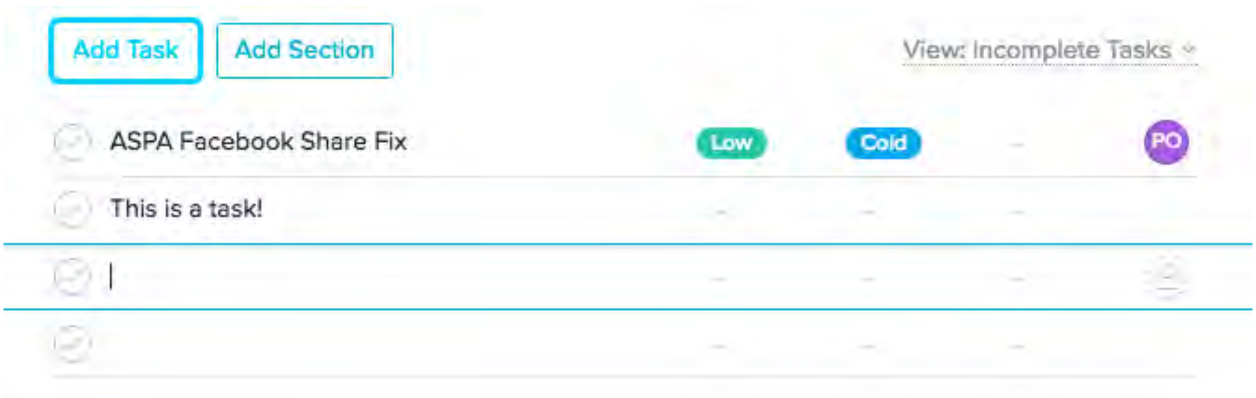
Asana centers around **projects (#1)**. The Focus Group organizes them alphabetically and has three project categories. The first category are our templates- they are marked with a green border to the side and are updated as needed. They are not used individually but can be copied for future projects 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



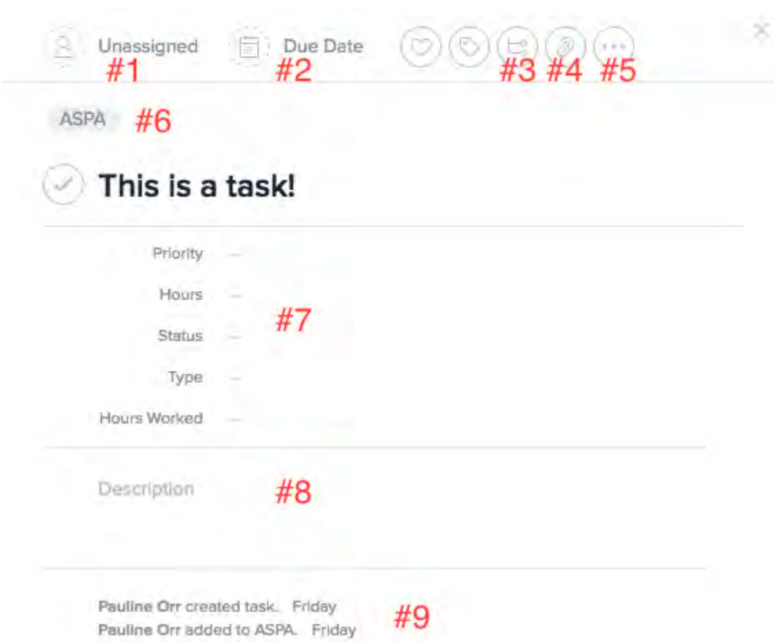
You write what the task is and press "enter" or click again to be finished. When a task is complete, click the check mark. The task will disappear into your archive.
By default, you see **incomplete** tasks. But you can set view to **all tasks** (incomplete and complete) or by project, due date or tasks 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 text without a check box and in bold to signify a section in your to do list. Some examples of their uses: organize 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 **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.

Read more on the Waiting on Tasks: https://asana.com/guide/help/tasks/dependencies

#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.

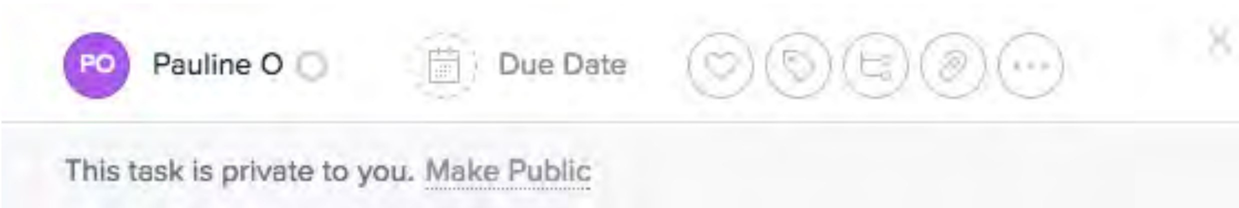
#9 is a record of the task's history. It is a nice way to check when a task is created and what has happened with this task since.

#10 is where anyone can comment on the task. This is a great way for make sure everyone is 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 are more details, simply write it in the task's description. Whereas "Upload to server" is unclear. What logo? What client?

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



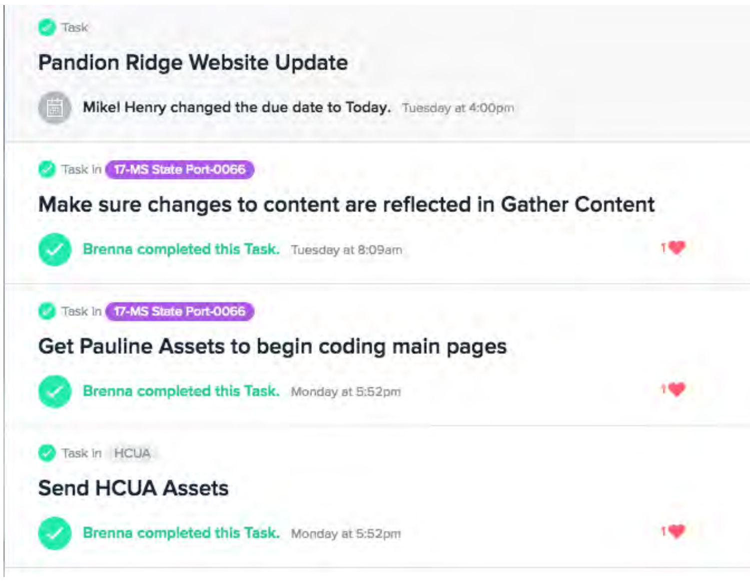
Above, is a task not involved with any project and by default, private to me. I can make it public. This means anyone can see and access this task. It will show up on calendars. If I add a follower, it will only be accessible by that follower and me. If privacy is important, knowing how Asana's privacy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

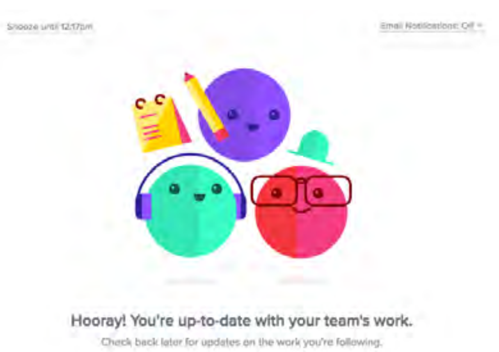
Staying Informed: Inboxing and Archiving

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, and 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 access your archive by clicking the "Archive" tab right next to "Activity" tab at the top. 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 an orange dot on the Inbox link:

This is your visual cue that there is 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.

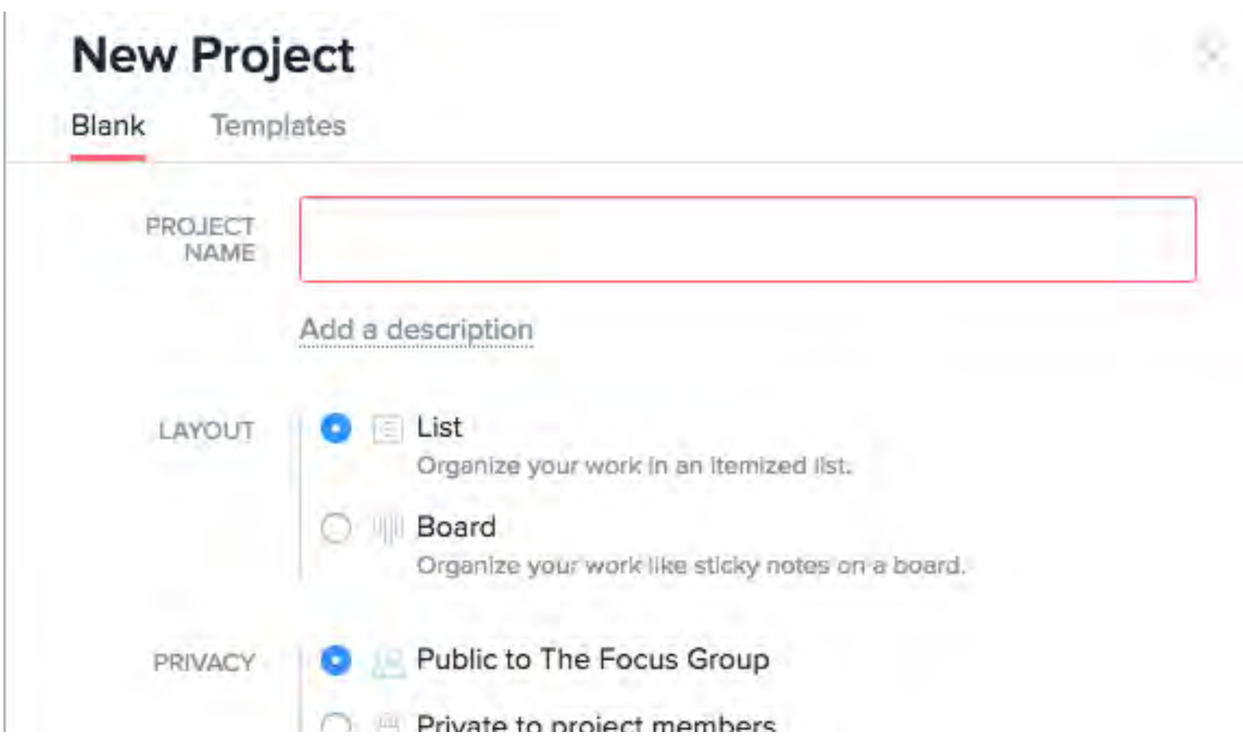
Speaking of email settings…

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 modal while you're here.

Starting Projects and Managing

Since we have already defined Active Projects and Campaigns versus Ongoing Clients, let's get into the details of starting projects. To create a project, click the + symbol in the side panel. A model will come up and you will have several options to choose from.

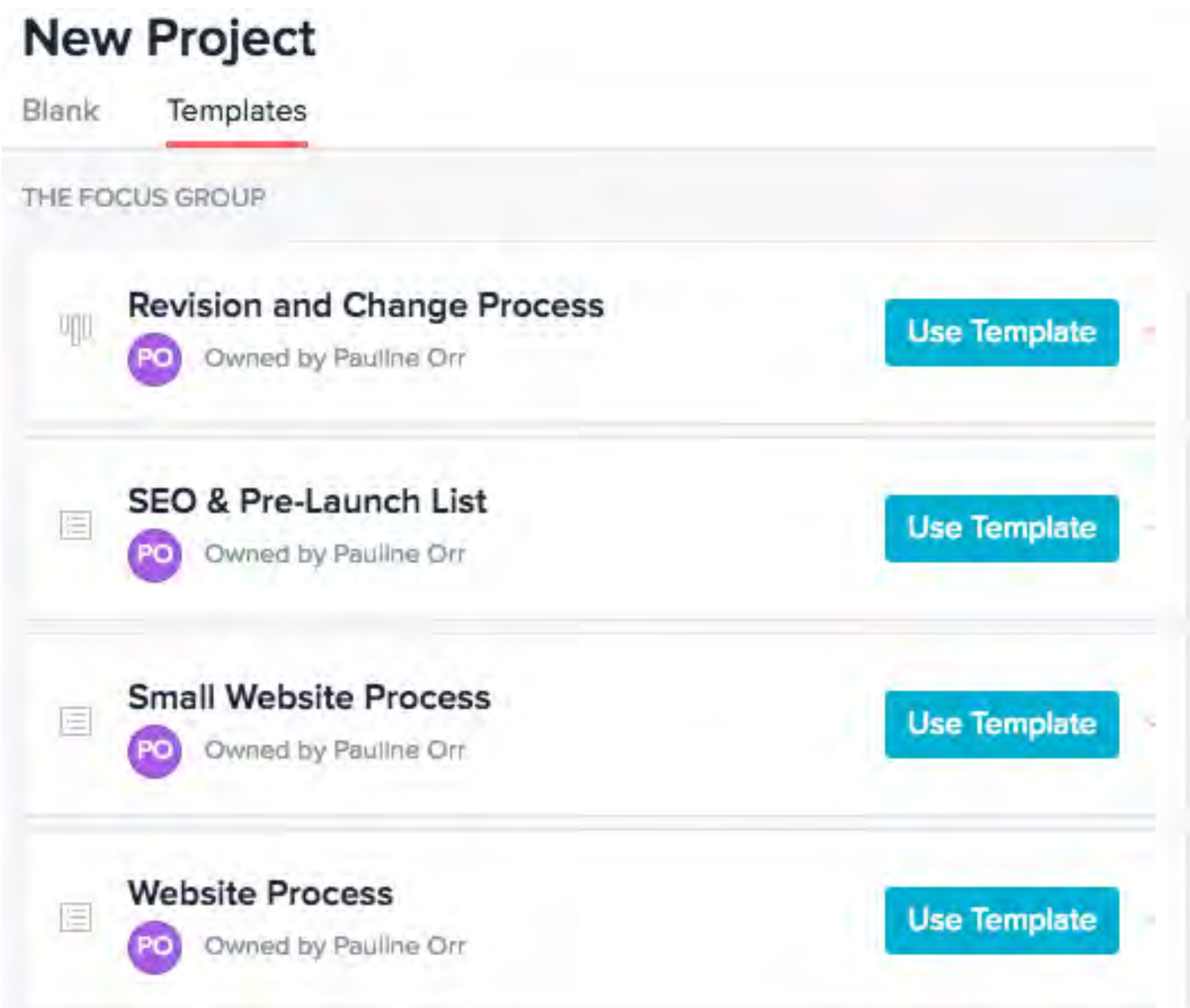


For campaigns and new ongoing clients, you'll typically start with a blank project. For campaigns and active projects, use the job number and name in WMJ. We do this for clarity for the entire team. For ongoing clients, name it the client name.

The most common layout we use is **List**. However, if this is an idea, brainstorming or mood board, we recommend using the board layout. If you are familiar with Trello, then you will have an idea of what the board layout is. Basically you create columns with tasks underneath them. You can drag tasks between columns too. It is a neat way to organize ideas in a fluid way.

Privacy setting depends on the project. Since the Focus Groups employs freelancers who use Asana, it may be something to consider if a project has a sensitive or private nature. Keep in mind that this is simply privacy of who can SEE and access the project. It doesn't have anything to do with followers.

If you are opening a website project, then it is recommended you use a template.



Currently we have these templates that follow our website process. Please note that small website process is meant for template websites.

An important step when creating a project is adding followers to the project. A follower of a project should be involved in the project. It is important to add followers to projects so that they will be notified of its changes and any conversations or project reports inside the project.

Just click the plus sign to add team members or edit its privacy status.

Custom Fields

Custom fields are a great way to gather more data on projects and tasks. Going through how to create them will give you an idea of what I mean. Go inside a project and click the down arrow next to the project's name in the near top of the page. You will see a drop down menu with links such as **Edit Name & Description**, S**ync to Calendar**, **Print**, etc. You will click **Manage Custom Fields** to see a modal pop up.

It is important to note that you manage custom fields on a project basis rather than having global fields that will affect every project you have. So when you add custom fields to a project, all tasks inside the project will have these custom fields. Here is a list of all the available custom fields we have now.

Priority is a nice way to let the assignee know how important this task is so they can plan their day accordingly.

Hours is how many hours have been allotted for the task.

Status is another way to keep up-to-date on a task labeled as waiting on, in progress, cold, or follow up on this.

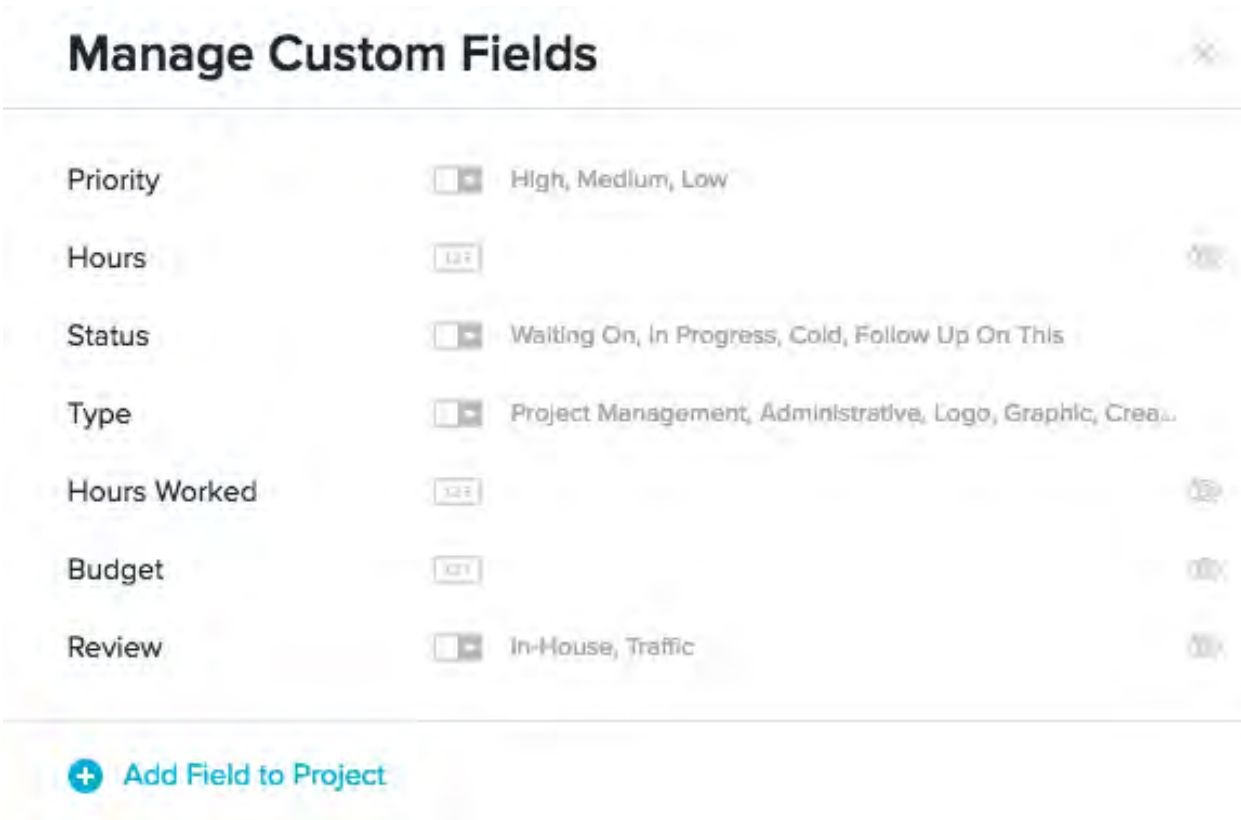
Type gives you a list of what the task pertains to; administrative, logo, etc.

Hours worked allows the assignee to put in how many hours they worked on the task.

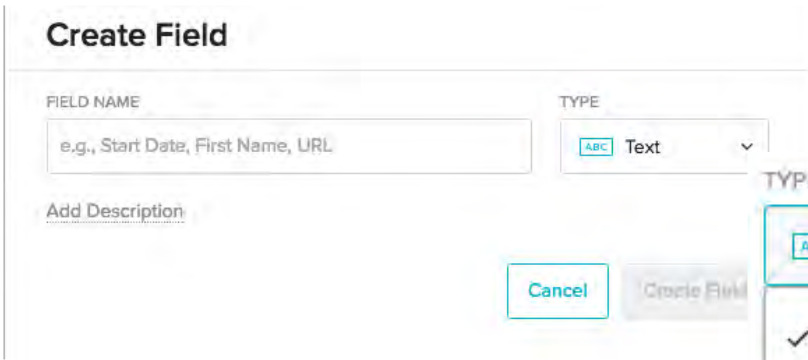
Budget can help with how the assignee may approach a task.

Review can verify who to go to once the task is done to review it.

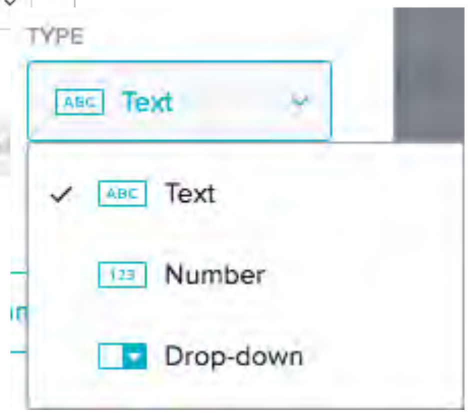
As you can tell, these fields help our freelancers with tracking their hours and help everyone know crucial details on a task.



If this modal is empty or doesn't show all of these custom fields, simply click the **Add Field to Project** button to see a list of all our custom fields to add it to a project. You can create a custom field inside this drop down menu too!



Give it a name and



declare its type. Your options will appear like this:

You have text, number and a drop down to choose from. The **Text** field is simply that; it also gives everyone the chance to type something in this field. **Number** gives you the opportunity of picking its decimal place- which is good for hours (example: 1.5 hours). **Drop-down** gives everyone the opportunity of picking between options. You can give each option its own color and add new options as you go.

Back inside the **Manage Custom Fields** modal, you can click the **gear** for each custom field to see this drop down:

Edit field is a way to globally edit a field, meaning editing will effect other projects with this field.

You can remove a field from a project or show this column in the task list. This means in the task list it will show this particular field and its current entry inside the project list. If you do not show it, everyone must go inside the task itself to see the fields. Showing it can enable quick changes to the custom field without having to go into each task to make a change. You simply hover over the "-" in the task list and change it from there.

To see what this looks like, it can look something like this in the task list.

To read more about custom fields, check out: https://asana.com/guide/help/premium/custom-fields

Viewing Tasks, Files, Conversation, and the Calendar

Knowing how use Asana effectively means having a few tricks to navigate it, as well as communicating effectively through it.

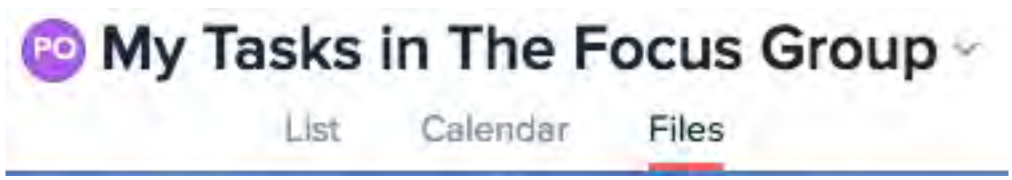
Opposite of **Add Task** you can see the view button.

Clicking it will give you options between tasks by project, due date, and even further with tasks completed today, yesterday, the past 1 to 3 weeks. This can be extremely helpful with searching for a specific task or to see what has been done. Oftentimes, I look at web projects by **All Tasks** so I can see exactly what has been done and what hasn't. Inside projects, you have more options: by assignee, by custom fields, due dates, and popular tasks.

These are the recommended views. You can customize it by priority, date, project, and even giving **hearts**, while also displaying it by incomplete to completed tasks. I recommend exploring these to see how this can all work together.

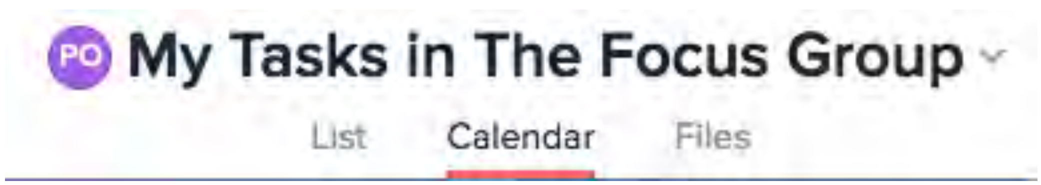
Files

As you know, you can attach files to a task. But what happens when you need to see that file on a task buried in a list of completed tasks? Under both people's tasks list and a project's task list, you can click on **Files**.



From here you'll see every file that's ever been attached to a task assigned to you. It is a quick way to navigate and find files. Simply scroll down to reveal more files if you aren't finding it in the first results.

Now



under calendar

You'll see tasks by due date. You can see how a person's schedule is panning out by looking at their personal calendar. However, it is important to note that you will only see other people's tasks you have access to in their calendar. If it is private, it will not show in their calendar. This goes to the **Team Calendar** as well; this is above the projects in the left side navigation. The team calendar is a great way to see how the team's month and week is going with what tasks they are up to and their due dates.

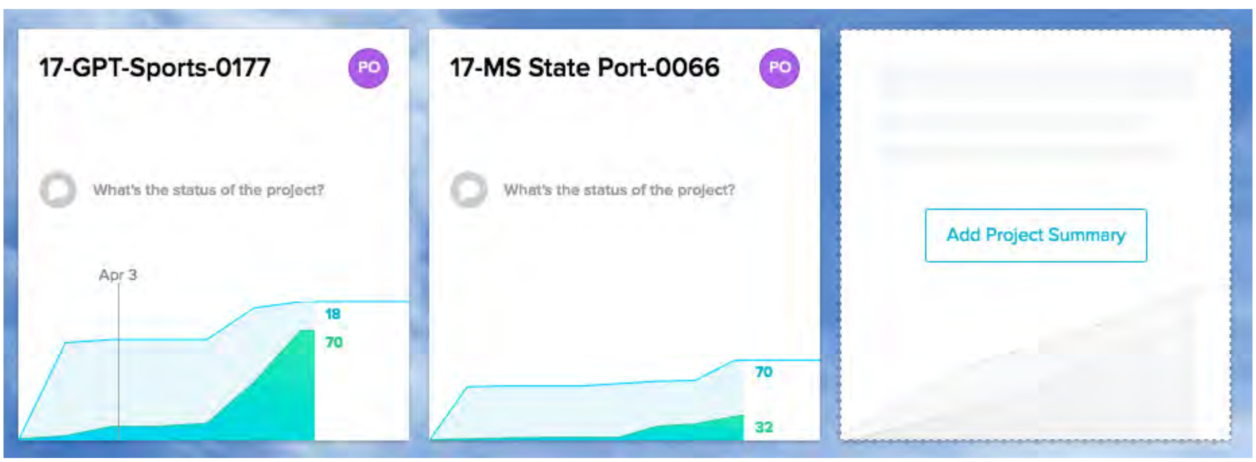
Note

You can navigate between team members on the left side panel. You can see all team members by clicking the + sign.

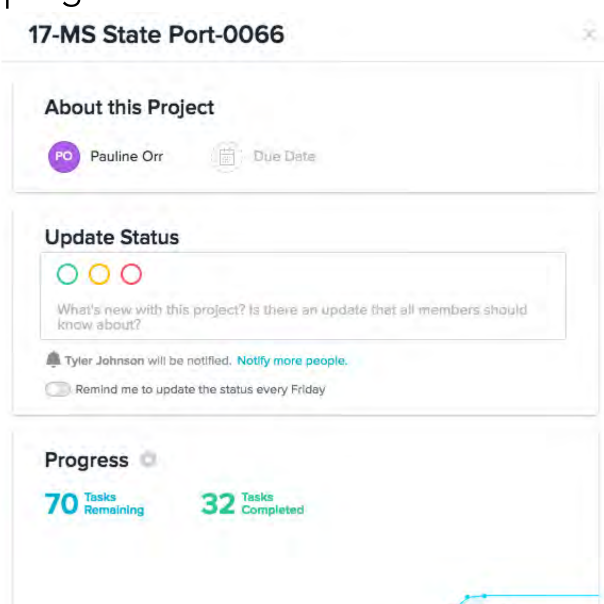
Inside the team conversations and project conversations you can post comments. In team conversations, everyone in that team will be able to see it, be notified of it, and able to comment back. The same goes to followers of a project in project conversations.

Using Your Dashboard and Progress Reports

A clean way to keep up with projects is by adding them into your dashboard. From your dashboard you can see a quick view of its current



progress.



From inside the dashboard, you can ask for a project update or issue an update in a project that will alert all project followers. You can even set a reminder to update the project's status every Friday. You can see how many tasks are in the project and how many are completed. **This is all the same as the project's progress page.**

You can select what section of tasks to count in the progress view by clicking the gear and checking off/on what section of tasks.

Also to be clear, you can find a project's progress while viewing it by clicking **Progress**.

You can add it to your dashboard by clicking its down arrow drop down menu or by clicking the **Add to Dashboard** button on the progress page.

To learn more about project progress, go to *https://asana.com/guide/help/projects/progress*

To learn more about dashboards, go to *https://asana.com/guide/help/fundamentals/dashboards*

Obviously the key to making the progress reports and dashboard work is to keep project and communications updated. It requires a team and commitment as well as a project leader keeping everyone on task.

Managing Teams and Organization's Settings

To learn more about this, I recommend going to the following links.

Managing an Organization
https://asana.com/guide/help/organizations/basics

Team Basics: Creating, joining and settings https://asana.com/guide/help/organizations/team-basics

Team Members: Inviting, Approving and Removing Members
https://asana.com/guide/help/organizations/members

Setting Team Permissions: Hidden, Public and Membership by Request
https://asana.com/guide/help/permissions/team-permissions

Project Permissions: Public and Private
https://asana.com/guide/help/permissions/project-permissions

Premium Organization Administration
https://asana.com/guide/help/premium/admins

Onboarding New Members

I recommend new members are given a chance to read their Focus Group user guide, the Asana onboarding checklist, watch training videos and even receive personal training.

As a test, assign them a task to create a new project using the Asana onboarding template. This template will have tasks all ready inside with basic things they will need to do in order to complete the project. It is simple: create a task, join a project, assign a task, add a follower and comment, but it is a good starting point for a new user.

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

Get the Asana Chrome Extension:
Chrome Extension, Assign Tasks From Anywhere Inside Chrome
https://chrome.google.com/webstore/detail/asana-extension-for-chrom/khnpeclbnipcdacdkhejifenadikeghk

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

Power User Checklist - https://asana.com/guide/resources/checklists/power-user

Dashboard Reporting (**Recommended,** 1 minute) - https://www.youtube.com/watch?v=fkW7_As9k6w&feature=youtu.be

Calendar (**Recommended,** 1 minute) - https://www.youtube.com/watch?v=w8t6KYiVPyc&feature=youtu.be

Admin Quick Start - https://asana.com/guide/resources/get-started/admin-quick-start