



Asana Webinar

Project Management 101 Series

Session goals and objectives

- Asana Orientation
- Assume the role of a Project Manager or Admin
- Practical application of Workshop content
- Apply Asana Best Practices

Session Content

- Signing up
- Navigating the homepage
- Your Settings
- Your team
- Projects and Tasks
- Communicating with people
- Sample Projects
- Best Practices

Asana Pricing

Free

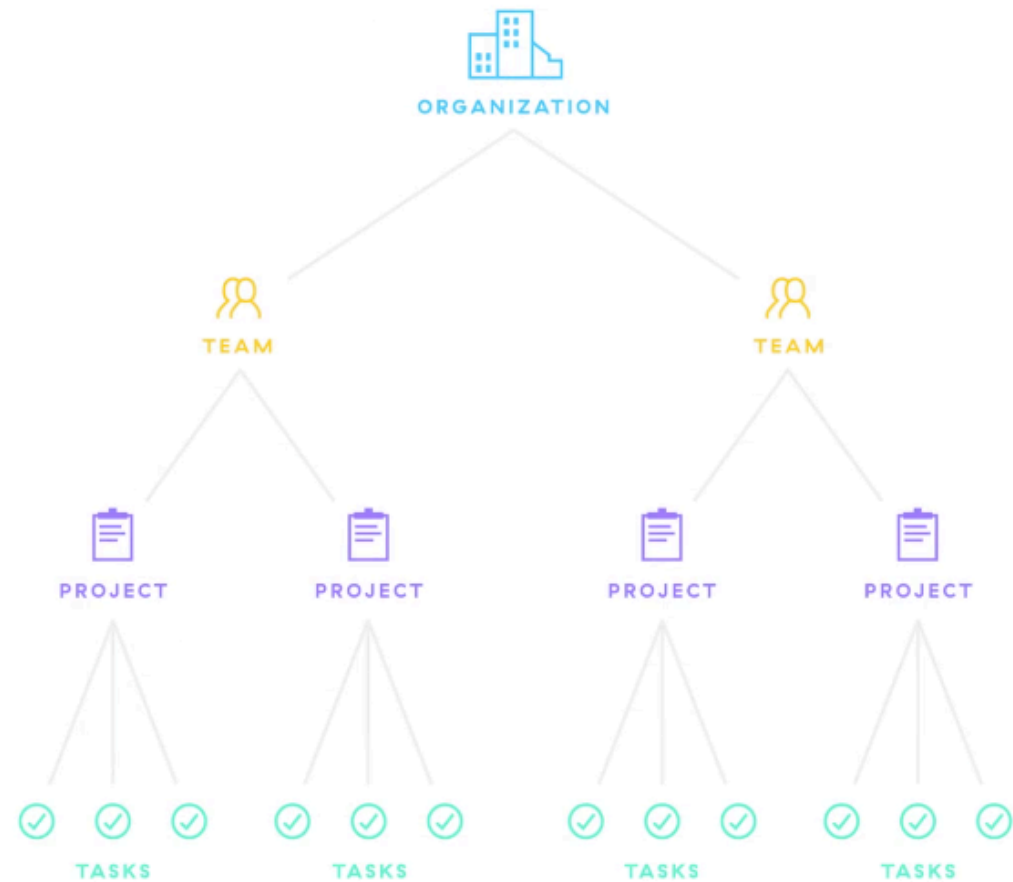
- Up to 15 users
- Limited Search
- Simple tasks
- Multiple Projects

Premium (\$7.50/mth)

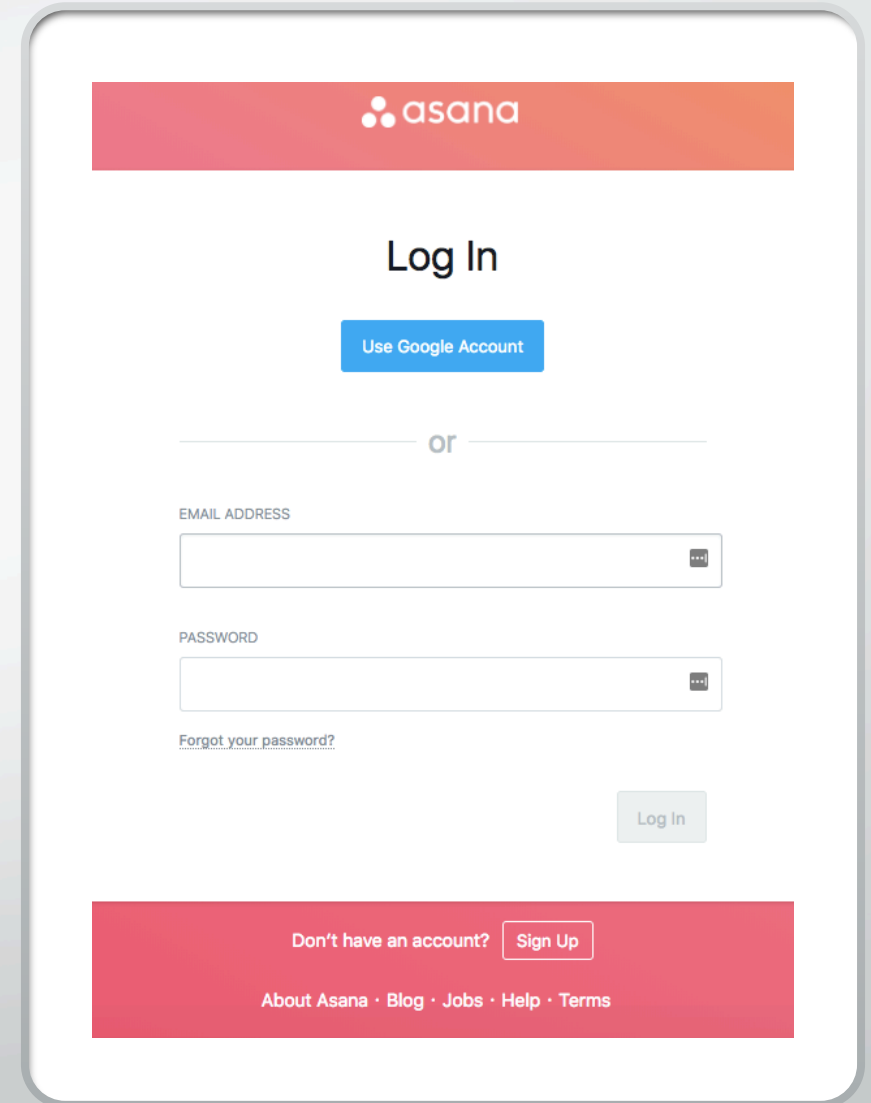
- Pay as you go
- Custom Fields
- Start Dates and Dependencies
- Project Templates
- Advanced Search Features

Relationships

- Teams: People working together on a collection of projects
- Projects: Groups of related tasks. Each team can have multiple projects.
- Tasks: Used to break down projects into smaller pieces of work



Demo: Signing up for Asana



The image shows a screenshot of the Asana login page. At the top, there is a red header bar with the Asana logo and the word "asana" in white. Below the header, the text "Log In" is centered. Underneath, there is a blue button labeled "Use Google Account". A horizontal line with the word "or" in the center separates this from the login form. The form consists of two input fields: "EMAIL ADDRESS" and "PASSWORD", both with placeholder text and a small icon on the right side. Below the password field, there is a link that says "Forgot your password?". At the bottom right of the form area, there is a grey button labeled "Log In". At the very bottom, there is a red footer bar containing the text "Don't have an account?" followed by a "Sign Up" button, and a list of links: "About Asana · Blog · Jobs · Help · Terms".

asana

Log In

Use Google Account

or

EMAIL ADDRESS

PASSWORD


[Forgot your password?](#)

Log In

Don't have an account? [Sign Up](#)


[About Asana](#) · [Blog](#) · [Jobs](#) · [Help](#) · [Terms](#)


Project Setup

 asana

Who's on your team?


[Continue](#)

 Experience the full value of Asana when your team collaborates together.

 asana

What is the name of your project?

[Continue](#)


 Use projects to track the tasks needed to achieve your goal.

Choose a project layout

LIST

BOARD

[Continue](#)

 Organize your work in an itemized list or like sticky notes on a board.

Navigating Asana

Menu Bar

Task View

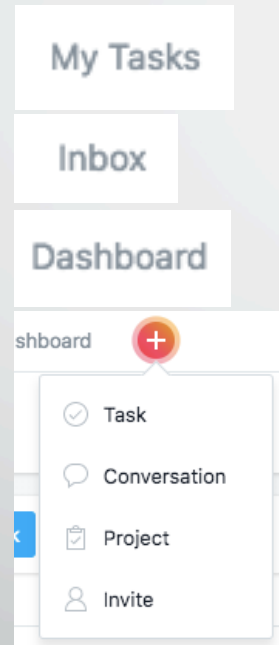
The screenshot displays the Asana web interface. On the left is the 'Menu Bar' (dark blue sidebar) with the Asana logo at the top. Below the logo are sections for 'My Dashboard', 'Marketing' (with team avatars), 'PROJECTS' (with a plus icon), and other departments like Engineering, Sales, Design, Managers, and Recruiting. The 'Website Launch' project is highlighted in blue. On the right is the 'Task View' for the 'Website Launch' project. It features a search bar, navigation tabs for 'List', 'Conversations', 'Calendar', 'Progress', and 'Files', and a 'View: Incomplete Tasks' dropdown. The main content area lists tasks under several categories: 'Goals and reference:', 'Milestones:', 'In-product:', and 'Launch day plans:'. Each task includes a checkmark, a description, a due date, and an assignee's profile picture. At the bottom, a URL is visible: <https://app.asana.com/0/49246933638815/49246933638815>

Category	Task	Due Date	Assignee
Goals and reference:	Website launch plan	Sep 30	[Avatar]
Milestones:	Design pages	Sep 25	[Avatar]
Milestones:	Code pages	Sep 28	[Avatar]
Milestones:	Pick new colors	Sep 30	[Avatar]
Milestones:	Review website updates	Tomorrow	[Avatar]
Milestones:	Q&A website	Wednesday	[Avatar]
In-product:	Top Bar/ In-Product announcement	Tuesday	[Avatar]
Launch day plans:	Day of launch- marketing coverage	Sep 30	[Avatar]
Launch day plans:	Social sharing	Sep 30	[Avatar]
Launch day plans:	Customer Quote plan	Sep 30	[Avatar]

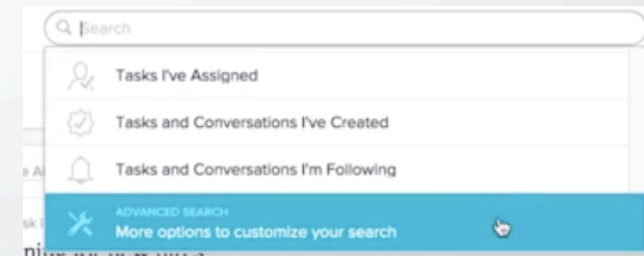
Navigation Elements



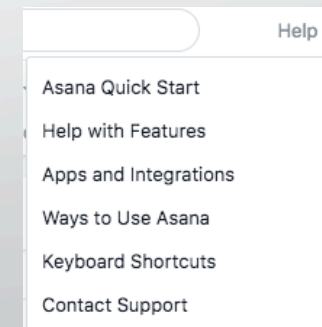
- My Tasks
- Inbox
- Dashboard
- Add (+)



- Search

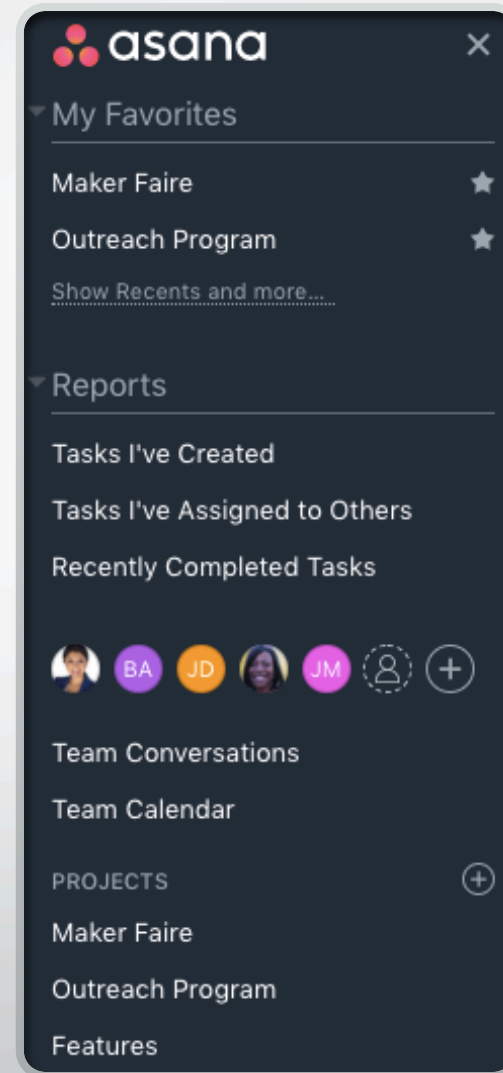


- Help



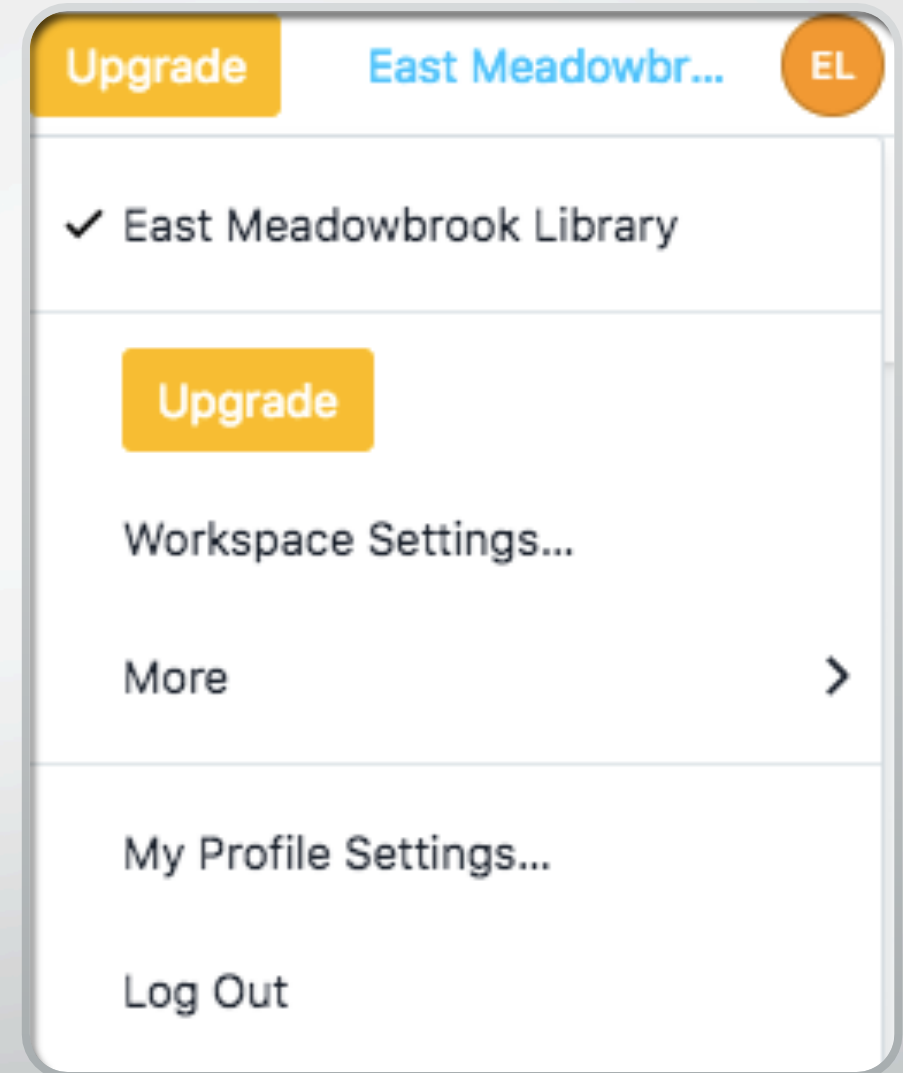
Menu Bar

- My Favorites
- Reports
- Team Members
- Team Conversations
- Team Calendar
- Projects




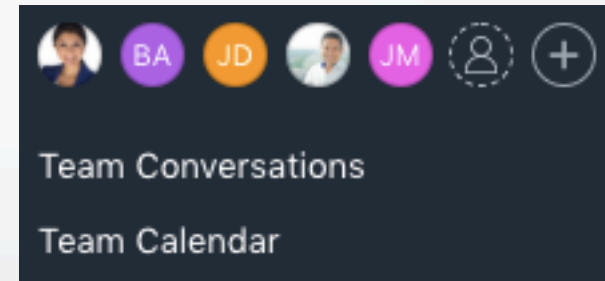
Profile and Preferences

- Select Workspace
- Upgrade to Premium
- Workspace Settings
 - Name
 - Invite Members
 - Time Tracking
 - Convert to Organization
- Email automation
 - Send to: x@mail.asana.com
- Apps and Hacks





Teams

- Invite Users 
- Users who collaborate on the same tasks together
- Assign Tasks
- Initiate Conversations and Messages

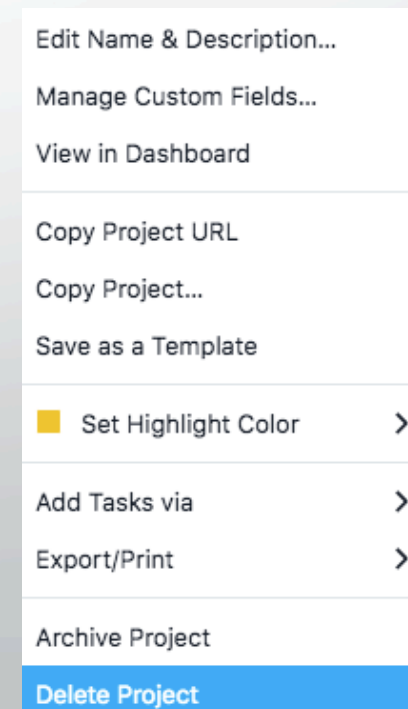


Creating a new Project

- Click on Plus Button in Menu  or from the Navigation Bar 
- Provide a name
- Select a Layout (List / Board)
- (Premium: Select Templates)

Project Settings

- Project Settings from Dropdown
- Project URLs
- Highlight Colors
- Import/Export Tasks



Project Views

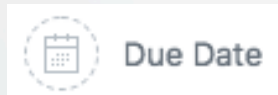
- List : Tasks Occupy Rows
- Conversations: Initiate or Respond to Questions and Comments
- Calendar: Synchs from Tasks
- Progress: Quick Status updates
- Files: Extracts from Tasks and Conversations

The screenshot displays a project management interface with several key components:

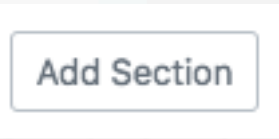
- Task List:** A list of tasks with checkboxes and phase indicators. Visible tasks include "P1: Finalize Exhibitors" and "P2: Define Event Space", both marked as "Phase".
- Status Update - Feb 26:** A notification from Patricia Jeffers stating "Updated the project status to green:" with a green progress bar and the text "Status on track".
- Update Status:** A section with three colored circles (green, yellow, red) and a prompt: "What's new with this project? Is there an update the".
- Task Progress:** A section showing two tasks: "BA Identify potential layout plans" (checked) and "BA Identify Space requirements" (checked).
- Notification:** A bell icon indicating "4 people will be notified. Add more project members."

Task Details

- Assign Resources
- Set a Due Date
- Tag
- Create Subtasks
- Attachments
- More Settings



- Sections
- Comment



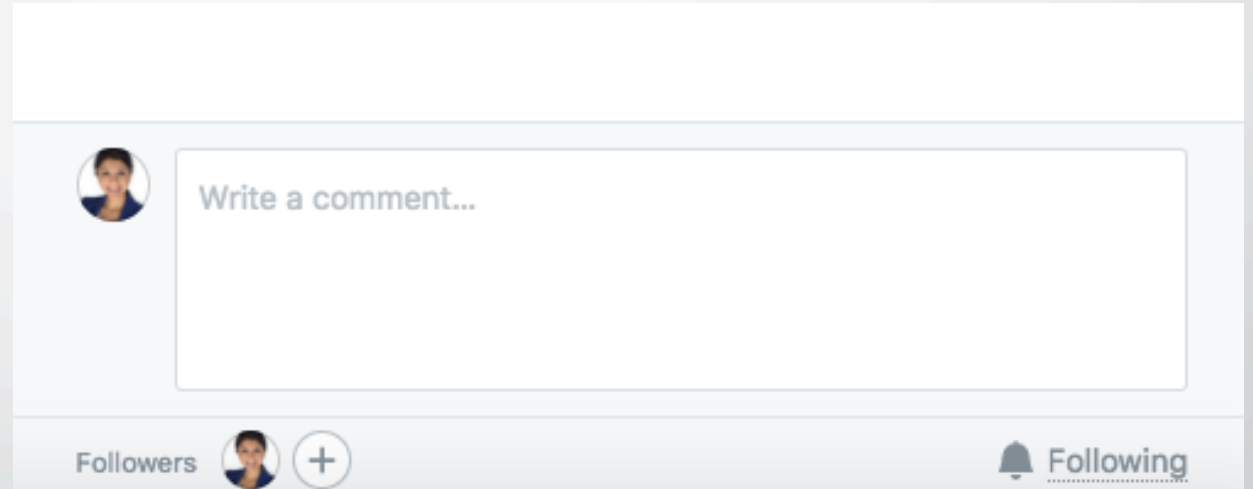
Inbox



- Alerts you when task or project statuses change
 - Tasks: Assigned/Unassigned/Due Dates/Attachments/Comments
 - Task/Conversation Likes
 - Projects: New Tasks added to a project

Conversations


- Activity Log for Projects, Teams and Tasks



Dashboards


- Quick Status view of Projects

The screenshot shows a project dashboard for 'Maker Faire'. At the top right, there is a user profile picture and a close button (X). The main text indicates 'Status on track'. A summary box at the bottom left shows the date 'Feb 25', '18 remaining' in blue, and '4 completed' in green. A small icon with the number '4' is visible at the bottom left corner of the dashboard.

Maker Faire 

Status on track

Feb 25
18 remaining
4 completed




Search Views

- Advanced Search Features

Contains the words

All Tasks Conversations

ASSIGNED TO  Em Laerton ×

IN PROJECTS ×

FOLLOWED BY

ATTACHMENTS Has Attachments Any

COMPLETION Completed Incomplete Any

DUE DATE Days

[+ Add Filter](#)

Best Practices

- Track Meetings in Asana
- Standardize using templates
- Use Comments and Link to Tasks
 - Mention a team mate @username in a comment
 - Link a task in a project conversation @taskname and @username

Conclusion

- Individual Sessions: <https://doodle.com/samsena>
- Additional Resources:
 - Website link to download: <http://www.samsena.com/PM-101-2018>