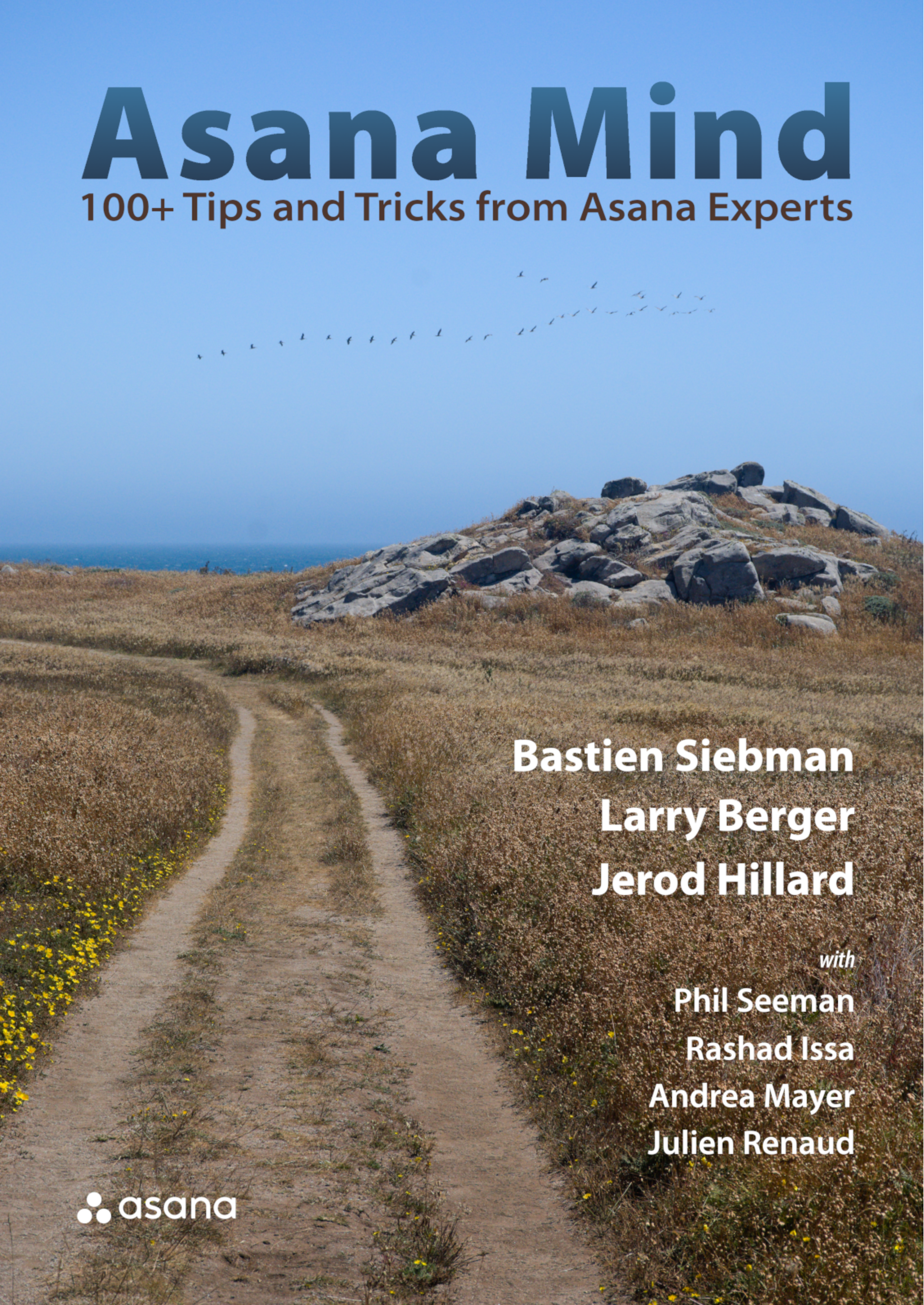

Asana Mind

100+ Tips and Tricks from Asana Experts

Bastien Siebman
Larry Berger
Jerod Hillard

with

Phil Seeman
Rashad Issa
Andrea Mayer
Julien Renaud

asana

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Foreword

At Asana, we believe there's power in collaboration. By working together, teams can accomplish more than any one single individual. That's why we created Asana Together - our community of Asana enthusiasts. These are folks who are passionate about helping teams find new ways to streamline their work and be more effective as they make progress towards their goals.

A fantastic example of what can happen when people put their heads together is the book you're about to read. More than just a set of advice from one individual expert, this book contains the best of the best: tips, tricks, and workflow ideas from across the spectrum of Asana experts who've contributed to our Community Forum. Our most involved Forum members have shared their Asana advice in this book, for teams of any size and at all levels of Asana expertise. Whether you're looking for tips on getting started with Asana, ideas for integrating your favorite tools into your workflow, or reporting on the work your team is accomplishing with Asana, this book (and the community members who've participated by sharing their advice) has something for you.

I'd like to extend appreciation from the entire Asana team to everyone who has contributed to the Community Forum, and a special thanks to our Forum Leaders. These are folks who are dedicated to answering questions and leading conversations in the Forum, thereby helping other Asana customers get more out of Asana and be more productive. It's because of them that this book came together.

I wish you and your team success on your journey to reach your goals. I know this book will help you get there!

See you in the Forum (forum.asana.com),

Joshua Zerkel, CPO
Head of Global Engagement Marketing (Lifecycle & Community)
Asana

Introduction

Bastien Siebman

When Asana started a few years ago, there was no community. You could only find a handful of geeks talking here and there. I was one of the gang, along with other consultants and app creators.

And slowly our group grew. First, on a Google group, then on the official forum. And that forum grew into a real community with many active members.

We all have different backgrounds and experiences. Some of us are full-time employees using Asana at work. Some are consultants helping clients. And others are app developers, trying to improve Asana any way they can.

We go beyond the Asana Guide. We complement the official training online. We push Asana to its limits, and try to help everyone as best as we can. We are also not afraid to give our point of view and sometimes challenge Asana in their decisions.

This ebook is a compilation of the best posts from some of the most active and dedicated members of this community, all of whom now carry the official "Asana Forum Leader" designation. This book, along with the Guide itself, will give you everything you need to successfully use Asana!

Annecy, France, July 21, 2021

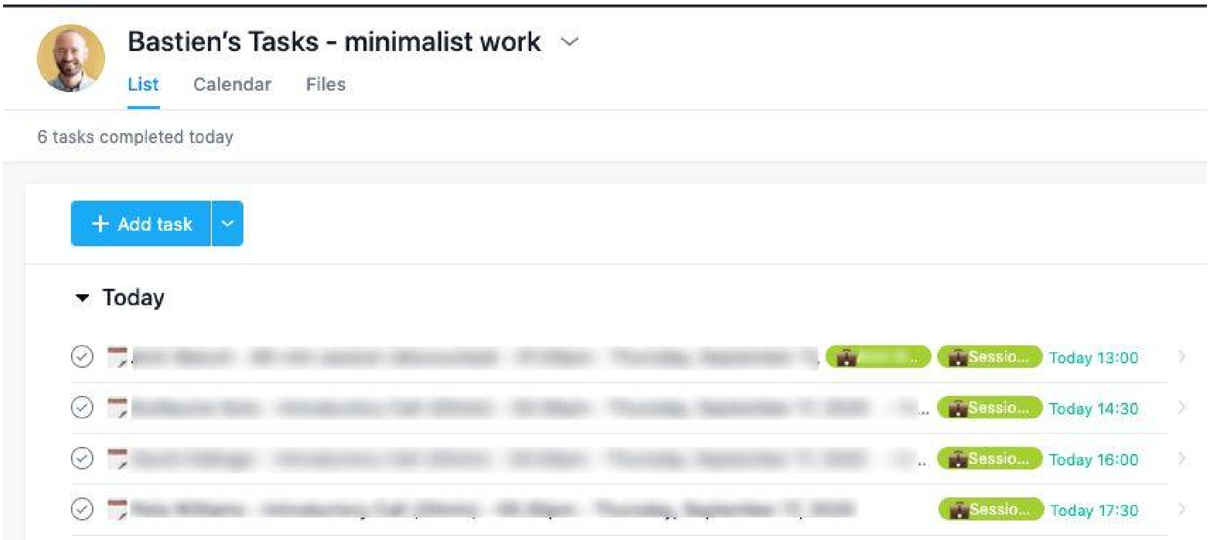
Section 1: Productivity

Productivity

Use My Tasks as a calendar

Bastien Siebman

Did you know you can turn your My Tasks view into a daily calendar? First, use a calendar emoji in front of tasks that represent an event. And make sure to have a due date and due time. Last step: each morning when reviewing tasks, manually sort them at the top of the list.



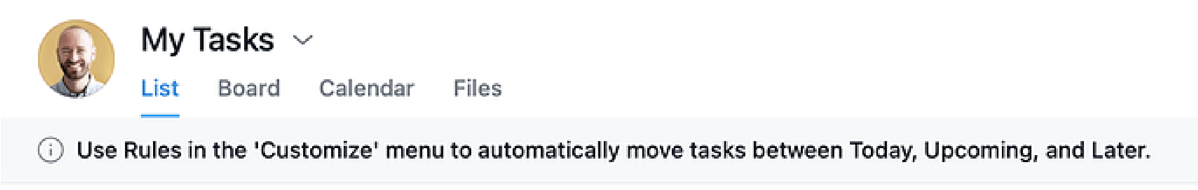
[Link to this tip's discussion thread in the Asana Forum]

Productivity

Be careful with task auto-promotion disappearing

Bastien Siebman

You might have seen the grey banner, as shown on the image, above your My Tasks view on Asana. Asana is rolling out a new version of My Tasks and you'll be missing deadlines if you don't do what I describe below.



What are you talking about?

My Tasks is being updated to what is referred to as V2, with a new Board view and customizable sections. A side effect of this version is that the task auto-promotion is gone.

What is task auto-promotion?

It is a hidden treasure of Asana: your tasks move automatically from Later to Upcoming and from Upcoming to Today based on the due date.

How can I get it back?

By following the instructions given in the banner, and define a specific rule in the Customize menu.

What happens if I don't?

All your tasks in Later will never move up and will stay hidden in that section, you might miss many deadlines!

[Link to this tip's discussion thread in the Asana Forum]

Productivity

💡 Use Asana as a habit tracker

Bastien Siebman

Did you ever think of using Asana as a habit tracker and enforcer?

I wanted to get into the habit of taking a daily walk outside. I set up a recurring task for myself, and now I see it every day in My Tasks. Even if I don’t do it one day, seeing that task every day motivates me and creates a habit in my brain!

Sorry, gotta go, it is time for my daily walk 🚶

[Link to this tip’s discussion thread in the Asana Forum]

Productivity

💀 What did you kill lately?

Bastien Siebman

Discontinuing projects is the best way to stay productive, save time and preserve your energy. Every once in a while, go through all your projects (not Asana projects, but initiatives/side projects/businesses...) and consider killing them. Here are my latest kills:

💀 Coachana was a Templana spin-off specifically for coaching programs. Took me a couple of hours to create, nobody used it, I killed it.

💀 Mailana was a tool to extract Asana projects as contacts in an address book to easily send tasks to them by email. I needed to migrate some other code it was based on, did not migrate Mailana.

💀 I created a system where you could get each day an Asana task with the weather for your location, the stock price of your stocks, etc. Never found anyone interested, I discontinued the project.

💀 Three-dots was a tool to share an Asana project as a webpage with a custom design. It required heavy server usage, was often timing out or crashing, and did not generate enough interest in the Asana community. I killed the project.

💀 I have a dashboard service generating Asana dashboard you can access with a unique URL. I only have one client using it, but still need to maintain the code. I reached out to the client with a deal, they wanted to stop using it anyway.

💀 I used to have a list of all the Asana experts in the world. I required too much time to maintain, I changed my approach, only listed one expert per country, and stopped the main list.

💀 I founded the first « Asana incubator », made of a group of individuals building apps around Asana. It was fun at first. But it turns out there was not a need for such a program. I also offered to sponsor someone, share my code with them, and coach them to create Asana apps. Nobody was interested.

💀 I also had a team of assistants working for me and clients directly in Asana. The team went from a single assistant to a dozen, and back to a handful. I decided it was not worth the time to maintain a team and find clients, so I decided to delegate to two trusted partners from now on.

Stopping those initiatives allowed me to focus on more promising or important projects! And it feels good to get that weight from your shoulders!

Link to this tip's discussion thread in the Asana Forum

Productivity

Guide for micromanagers

Bastien Siebman

🕵️ You can't help it, you are a micromanager. You want to know every single thing that happens at work, and when Asana was brought on, it felt like a gift: you can finally see everything!

🙂 But now the honeymoon is over and you are buried under notifications. You can't keep up anymore. Let me help you get the most out of Asana!

1️⃣ Don't follow everything. That seems obvious, but Asana will naturally amplify the number of things to read. You were maybe able to read all the email chains of the company, but with Asana tasks are flying around like crazy. Processes that were known by the teams are being discussed, steps that were quietly done by team members now appear as tasks... you can't follow everything, you need to make choices.

2️⃣ Use reports. Asana has a powerful search engine and the result of a search can be saved as a report. Then reports show up in your sidenav. For example, you could have a report for any urgent task that had an approaching due date. Or another one for tasks specifically assigned to someone that tends to drop the ball. Build a strong suite of reports and you'll never have to navigate through projects anymore.

3️⃣ Use existing reports. They are in the sidenav as well, they include « Tasks I've assigned to others » and that is a great way of following up on things.

4️⃣ Use follow-up tasks. When you see a task notification in your inbox, you can very quickly create a follow-up task. That way you don't have to remember to check the task, and you safely remove yourself from the collaborators. Just push the follow-up task to a few days out and check the task when that date comes.

5️⃣ Leave conversations and ask to be brought in when needed. Trust your team to know when to involve you, and remove yourself from the collaborators as soon as you answer a question. Tell them to bring you back in with a mention whenever they need it.

Hope that helps.

[Link to this tip's discussion thread in the Asana Forum]

Productivity

💡 Why and when to use task templates

Bastien Siebman

Asana recently introduced the concept of task templates: you can now create, in a project, a list of « task examples » and when creating a task in that project, you can pick from your list of templates.

At first, my reaction was: I don't really need task templates. And when looking at the feature more closely, I realized there were many possible use cases for them!

Here is a list of ideas:

- 💡 have a template with a specific set of collaborators, e.g. the entire marketing team
- 💡 have a template with a complex description, e.g. list of questions to ask a lead
- 💡 have a template with many subtasks that you usually create manually, e.g. steps to write a blog post
- 💡 have a template that predefined values for custom fields, e.g. pipeline stage for a lead and most common origin and country
- 💡 have a template that defines a specific due date based on the creation date, e.g. a bug always has to be fixed within 2 days
- 💡 standardize a task for repeated use (thanks to Larry Berger) because sometimes you just want to ensure consistency
- 💡 of course the template can mix all those ideas!

Side note from Larry Berger:

Assignment in the template task, or subtasks of it, will not result in the appearance of the task/subtask in the assignee's My Tasks. That won't happen until the instantiation of the task template into an actual task.

[Link to this tip's discussion thread in the Asana Forum]()

Productivity

About Custom Templates (Premium feature) and their Teams/permissions/privacy

Larry Berger

I received this great question the other day:

I want to save a private project as a template and I want the template to have the same permissions as the project--and not be visible to the entire organization. I don't really know what happens when I hit "Save as Template" and I'm afraid to do so until I'm clear on what happens with the permissions.

Not knowing the answer offhand, I checked "Custom Templates" in the Asana Guide, but it wasn't detailed enough to provide the answer either, so I tested it.

Custom Templates that you create end up grouped by team. A team project will become a team template visible to the same people the project is. More specifically (and not documented), if the project is public to the team and saved as a template, the template will be visible to the team. If a private project is saved as a template, the template will be visible to the project members.

It's not easy to create an Organization-wide custom template (unless you already have a team with everyone in the organization as members). I found a feature request for that on the Asana Community Forum (and voted for it).

But the rest of the functionality regarding access/permissions for Custom Templates is nice to see because it lets you use templates for many scenarios; I didn't expect all that fine-grained control would be possible!

Link to this tip's discussion thread in the Asana Forum

Productivity

Create shortcuts to data

Bastien Siebman

When you have a large Asana account, it might sometimes be hard to remember where something is stored. For example: did I store our list of forms into the general Forms project or the Marketing Materials?

If you often end up in the wrong place but believe that is still a valid place in Asana to store something, there are two options:

- if possible, multi-home content into several projects
- create a « shortcut data », which is a task named exactly the same way but in the description, you mention the official/original task. So with a simple click, you are taken to the right location and the right task.

Link to this tip's discussion thread in the Asana Forum

Productivity

🌋 My biggest productivity trick for 2021

Bastien Siebman

What is my biggest productivity trick for 2021 in Asana? Glad you asked!

Create a project with a priority custom field (with an option for High, possibly High-Medium-Low), and move into that project anything that is not urgent, and un-assign the task from you.

As a result, your My Tasks view will be emptied of almost everything, and you'll feel better instantly. Whenever you have a moment, open the project and tackle the tasks from top to bottom.

You'll quickly realize that what you considered to be a High priority, well, it seated for two weeks in the project without being done and the world is still spinning 🤷‍♂️

[Link to this tip's discussion thread in the Asana Forum]

Productivity

🤯 When overwhelmed, start with one source

Bastien Siebman

I have 2 email addresses, and 3 Asana accounts I need to check. Some days, things just feel like they are piling up in all 5. My solution to this problem is to tackle the sources one by one.

I'll usually start with the emails. Go through the list and try to act on each one. If I can't act right away, the email becomes a task in my Asana.

And then I look at my My Tasks views. Because I am overwhelmed, anything not urgent or important gets pushed back to a future day. And for the rest, I will try to organize in Today or Upcoming. And when I'm done organizing, I go through the list again from top to bottom...

Eventually, the overwhelming feeling dies away!

[Link to this tip's discussion thread in the Asana Forum]

Productivity

Quick Tip: Getting Around List View Quickly

Larry Berger

I wanted to share a couple of simple sequences I use often that save me time when in ListView (in My Tasks or a Project) where I spend most of my Asana time.

I often need to toggle between seeing:

1. the full view of all tasks and columns (right Task Detail pane closed), and
2. the same view but with the right Task Detail pane open

I used to do this with the mouse but it involves some mouse moves, clicks, extra time, and removes my hand from the keyboard.

The quicker way is this. With a task selected (highlighted in blue):

1. Tab+Enter to open the right Task Detail pane
2. Tab+Enter again or Esc to close the right Task Detail pane

Here's one more common sequence I use–quickly adding a Task Description:

1. Tab+Enter to open the right Task Detail pane (not needed if it's already open)
2. Tab+R and now type your Task Description
3. Tab (I guess this is needed to escape from the Description field)
4. Esc to close the right Task Detail pane

That's it! Written out it looks cumbersome, but once it's in your muscle memory I think you'll benefit from it.

[Link to this tip's discussion thread in the Asana Forum]

Productivity

Time Blocking in Asana with KosmoTime

Jerod Hillard

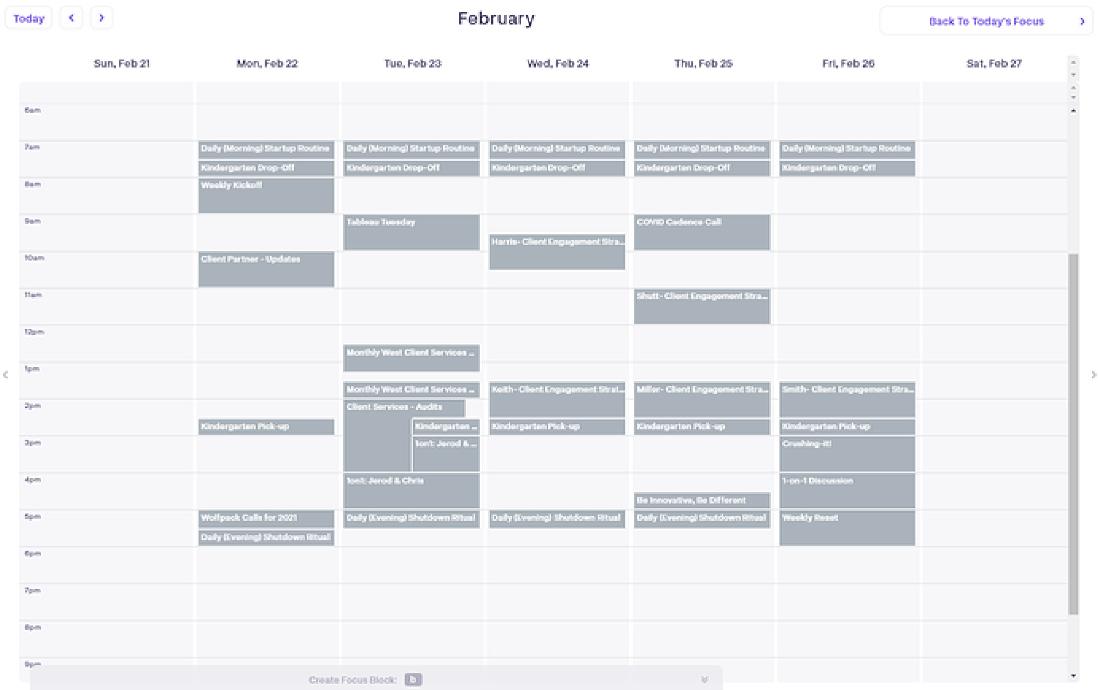
Time blocking? *What is that* you might ask… It is a simple practice of planning out the moments of your day in advance and dedicating specific time "blocks" for certain tasks and responsibilities. While a standard to-do list tells you what you need to do, time blocking tells you when you're going to do it (more than just when it is *DUE*) When you fill your calendar with the tasks and things you *want* to do, it's harder for others to steal your time. 😉

How often would you say you've completed 8 hours of work in an 8-hour workday? Whether it's endless meetings, constant emails, or coworkers (virtually) popping in for a "quick chat," your productivity rarely makes it through the day, *right*?

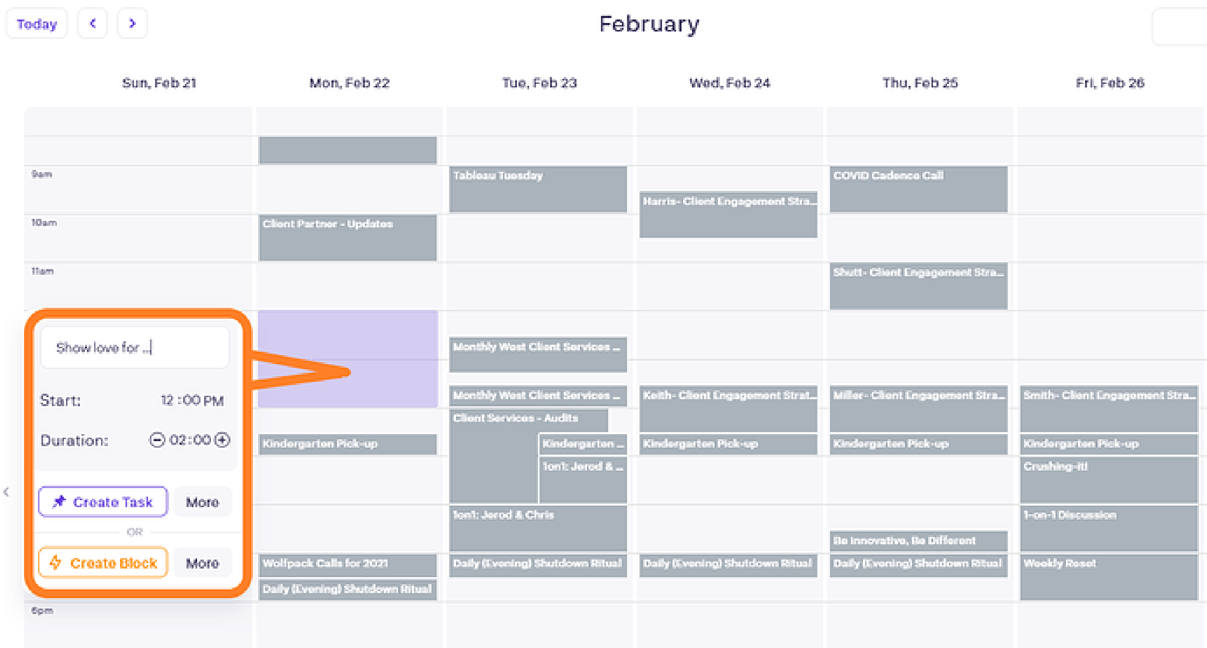
Do we all agree that if you only realize 1-2 hours of productive time, in an 8-hour workday, this presents a problem? Well, this is where the power of [Asana +:KosmoTime 75] (developed by Nicolas Vandenberghe) puts you back in the driver seat and on the road to a more productive tomorrow!

**Here is how you can use time blocking to make the most of the time you have each day, *5 simple steps*.

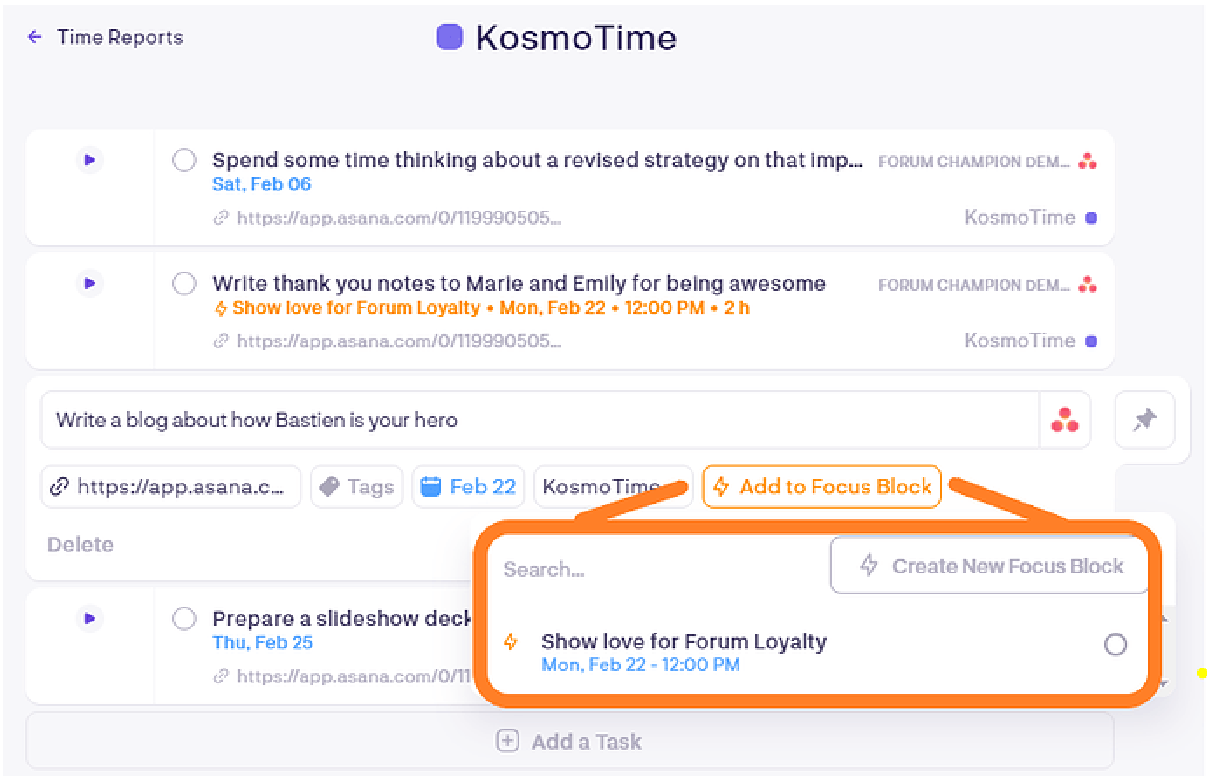
1. Evaluate where you have openings in your upcoming week. In this case, my Outlook calendar is dynamically synced to KosmoTime.



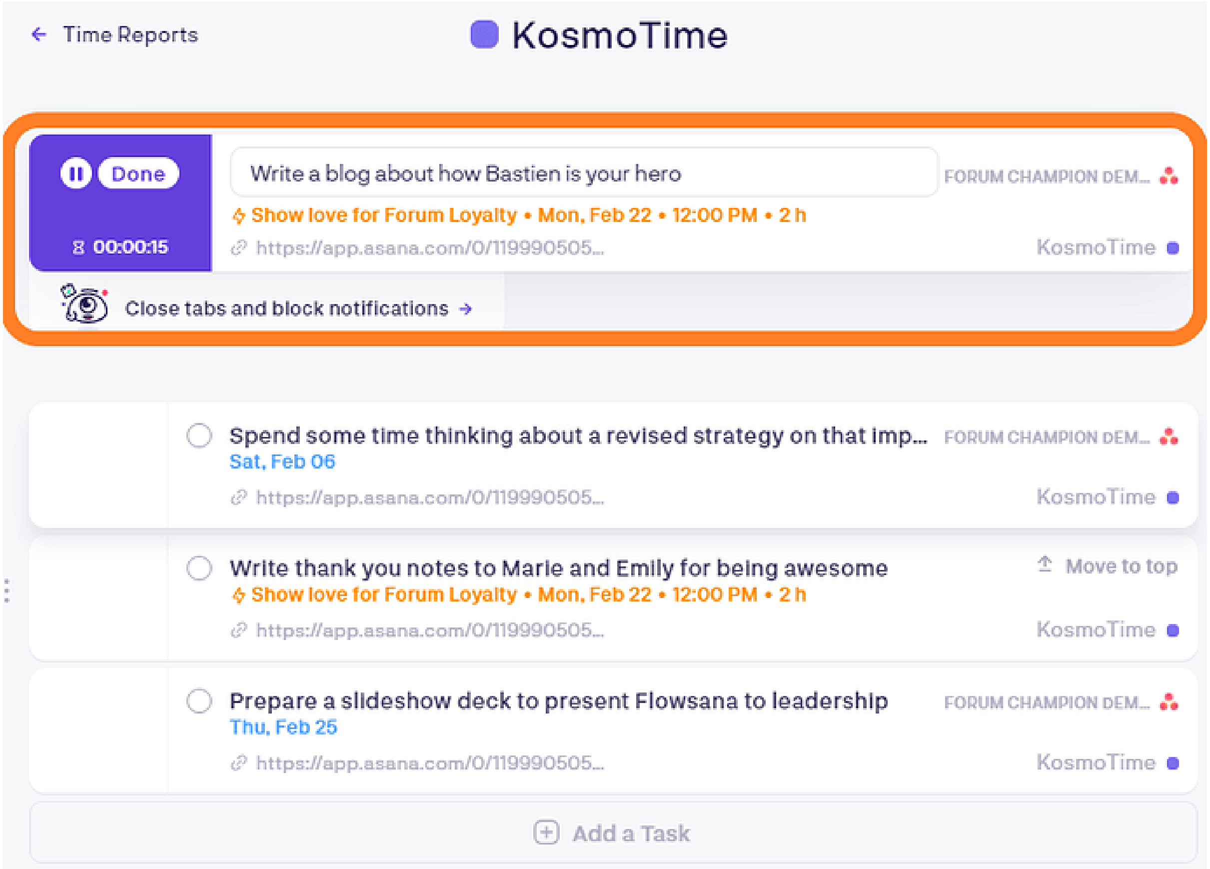
2. Select specific blocks of time where you want to dedicate yourself to perform "deep work" on tasks that you have prioritized *WHILE making sure your colleagues see you are unavailable*. Value YOUR time!



3. Batch Asana Tasks to dedicated Focus Blocks so this time has both purpose and definition.



4. [OPTIONAL] Use the embedded time-tracking and distraction blocker features to stay on pace and shut out distractions (with the option to block open browser tabs and set your communication stack to a “do not disturb” mode)



5. Finally, review your calendar at the close of each day so you can make adjustments for the week ahead. Once you start to get a taste for the productivity that comes with valuing your time, it will be hard to not make this a key step to your workflow! 😉

A few potential enhancements for Nicolas Vandenberghe to consider:

[I invite other Asana lovers to share their experience and feedback in this thread as well.]

1. Within the Calendar Powers, I could see value in being able to set separate preferences for whether to enable the “hide titles” or “show as busy” options
2. Introduce a Workspace and Teams layer to the task hierarchy. I would love to be able to see All Tasks (Workspace Layer). Also, when wanting to see just tasks within a specific Project or Team it would be nice to have Teams as a part of the hierarchy - allowing this grouping to contain their associated Projects. Otherwise, the Projects list can be rather long for power users making it difficult to find what you are looking for. I believe in a lot of ways this also

would improve the navigation (assuming you could collapse and expand Teams).
3. It would also be nice to have the option to enable/disable which workspaces, teams, or projects are synced or seen in the navigation pane.

Link to this tip’s discussion thread in the Asana Forum

Productivity

📅 Use a « real » due date when using task auto-promotion

Bastien Siebman

Task auto-promotion is the feature I use the most. I assign a task to myself, choose a due date in the future, move the task to Later, and the task comes back to me automatically on the due date.

👌 However, I am trying more and more to choose the « right » future due date. That due date has to be the date on which I'll be able to act.

💡 Here is an example: you assign yourself on the task representing a client you just emailed, and choose the due date in 2 weeks. When the task comes back to you, you think to yourself « 2 weeks is not enough, let's wait another week before reminding them » and push again the task by a week.

🔋 That is a lot of wasted energy! Try to choose right away the right due date on which you'll have to act. In that case, 3 weeks right away. If the client answers before, good. Otherwise, no energy is wasted.

Editor's Note: While My Tasks no longer includes task auto-promotion, the same behavior can be implemented via rules, and the same principles described above still apply!

[Link to this tip's discussion thread in the Asana Forum]

Productivity

How to add a numeric field to many projects

Bastien Siebman

Let’s say you need to add a numeric custom field to many projects. For example a budget in dollars. You don’t want to manually add the field to every project.

The trick is to create a portfolio and add all those projects in (that is the manual part). Then go to the workload tab and choose the budget field as the effort metric. Asana will allow you to add the field to every single project if they don’t already have it.

You’re welcome 🙂

[Link to this tip’s discussion thread in the Asana Forum]

Productivity

The coolest Asana rules 😎

Bastien Siebman

When you discovered the Automation feature, with its triggers and actions, you probably thought "yeah that is cool, I could use it to automate a bunch of stuff like complete a task when a status changes". I was pretty excited myself, and I was even more excited when innovative and fun ideas started popping up here and there about how to use rules in new ways… Here is a list of the coolest Asana Rules you probably did not think about!

The Unassigner

The Cry for Help

The Butler

The Clock Master

The Date Equalizer

The Lurker

The Architect

The Template Perfectionist

The Finisher

The Protector

The Storyteller

The Middle-Man

Out of Office

The Gentle Whisperer

The Cleaning Lady

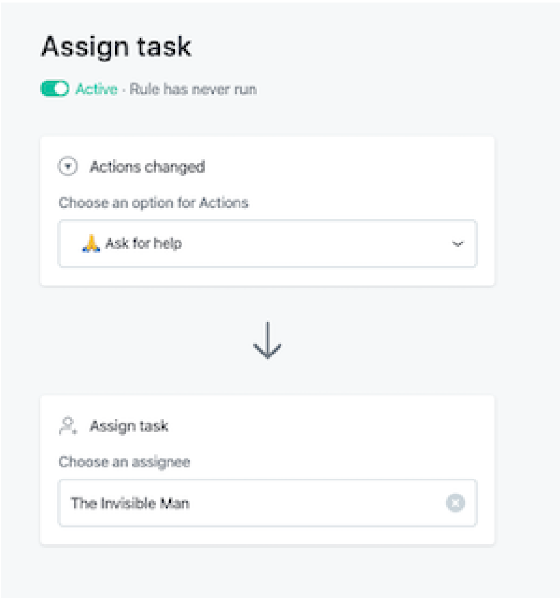
The Standup Robot

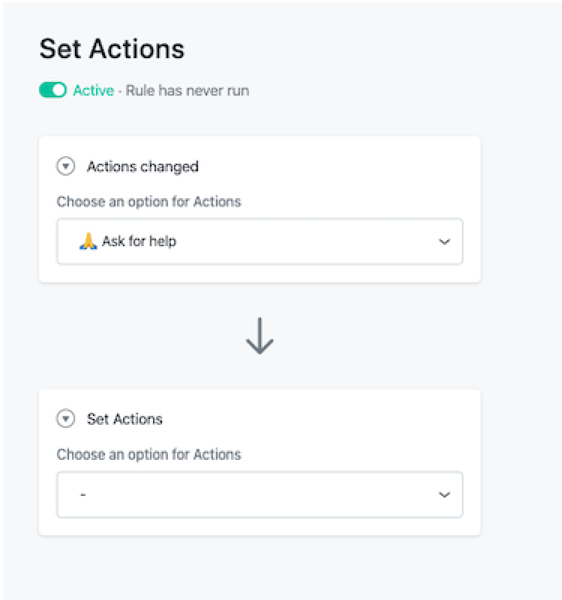
⭐ The Unassigner ⭐

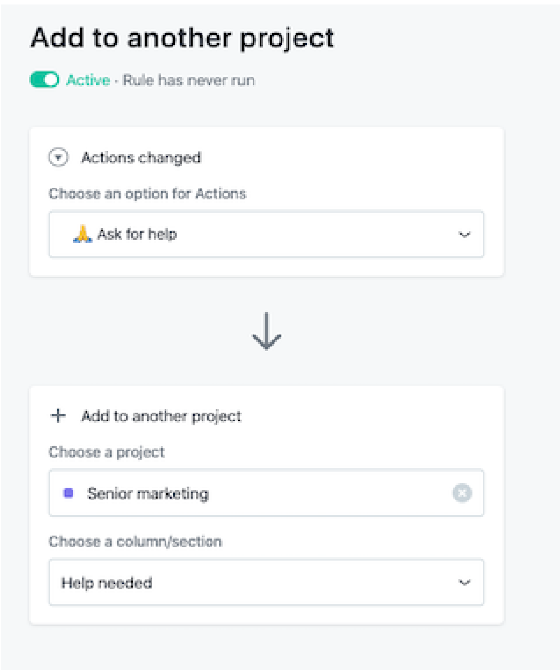
- *Goal*: assign a task with a rule even though this action does not exist (yet).
- *Idea*: if your email address is siebmanb@gmail.com (highly unlikely because it's mine), then you can create an Asana account with siebmanb+invisible-man@gmail.com. The subscription emails will land in your regular Gmail account, but Asana will see it as a new guest account. Name your account « Invisible Man » and add a nice profile picture. *Voilà*: you can set up rules to assign to the invisible man.
- *Why it's cool*: because you can now un-assign from yourself without assigning it to an existing user.

★ The Cry for Help ★

- *Goal*: have a "ask for help" action on tasks.
- *Idea*: create a custom field called "Action" with an option "Ask for help" that adds the task to a project followed by a group of senior staff and another rule to assign it to a guest account (like the Invisible Man). Then set up a rule to reset the custom field to the value « -« (you need to actually create that option).
- *Why it's cool*: you never know who you should ask for help? This rule will do the work for you.

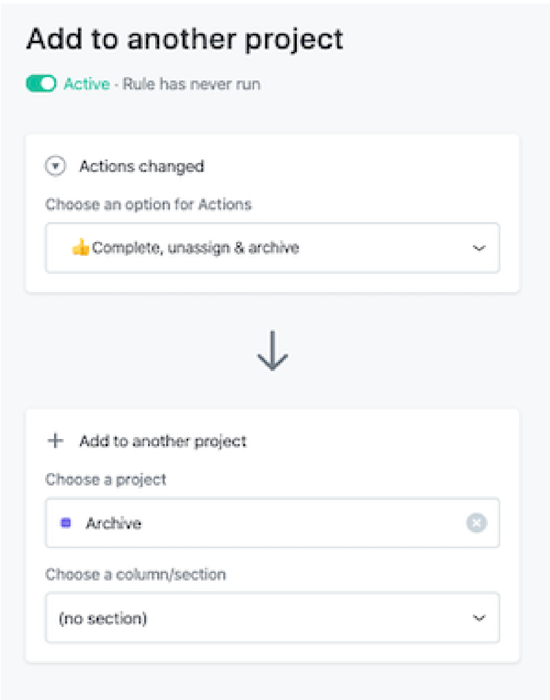


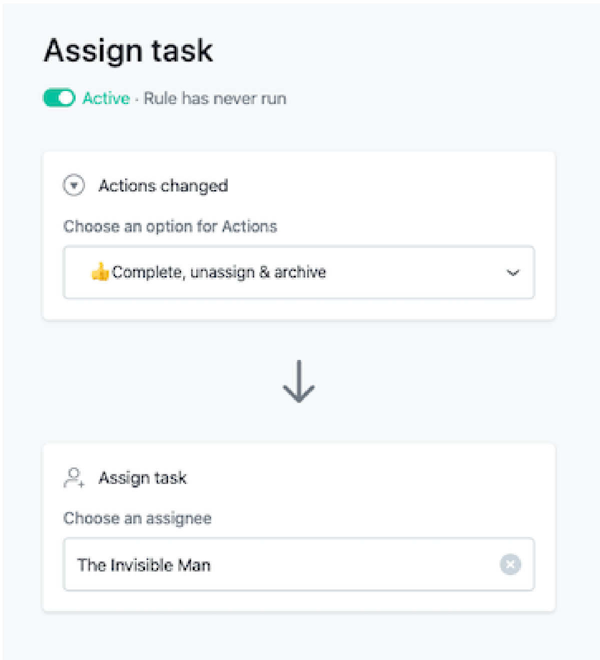


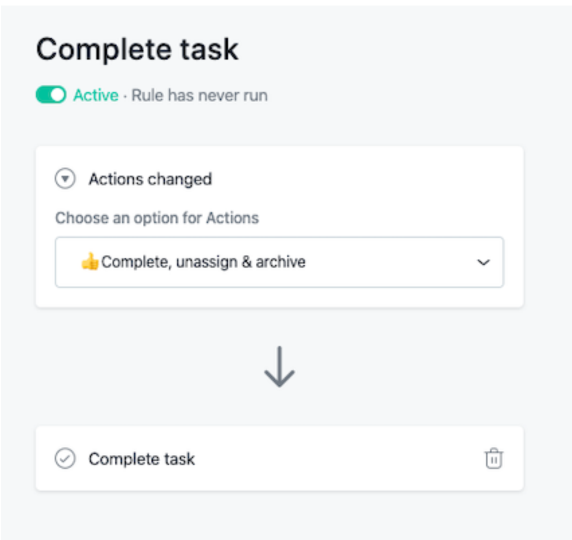


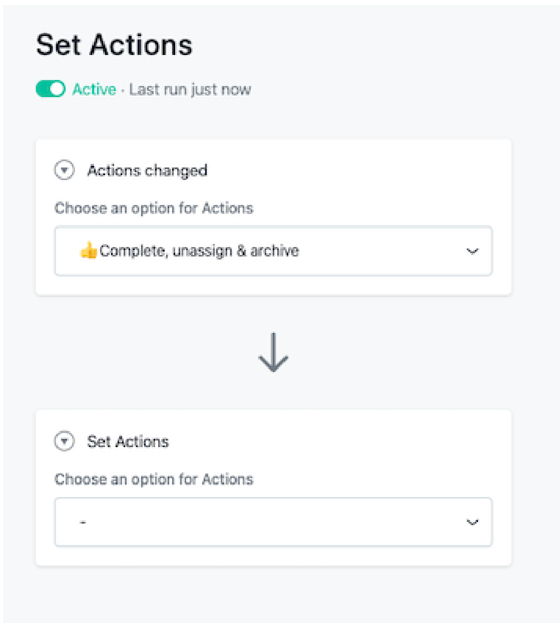
⭐ The Butler ⭐

- *Goal*: use a custom field as an action list.
- *Idea*: create a custom field with options like “Complete, un-assign, and archive”, and create rules to do just this whenever this value is chosen for the custom field. Then set up a rule to reset the custom field to the value « -« (you need to actually create that option).
- *Why it’s cool*: because we always see custom fields as “dumb” values, never as actions you could trigger. And you can save time by combining multiple actions.



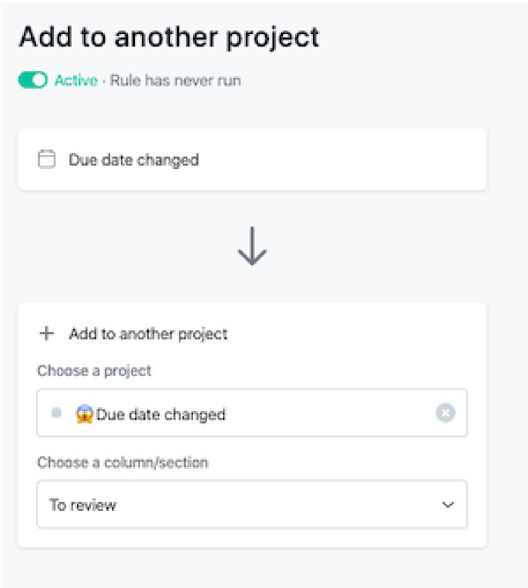






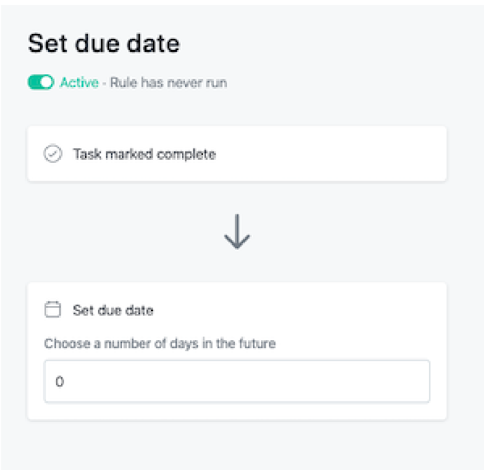
⭐ The Clock Master ⭐

- *Goal*: get notified of any due date change.
- *Idea*: create a project called "Check due dates" and create a rule to add any task with a due date changed to that project.
- *Why it's cool*: you don't need to forbid people to change due dates anymore, you can watch from behind the curtain.



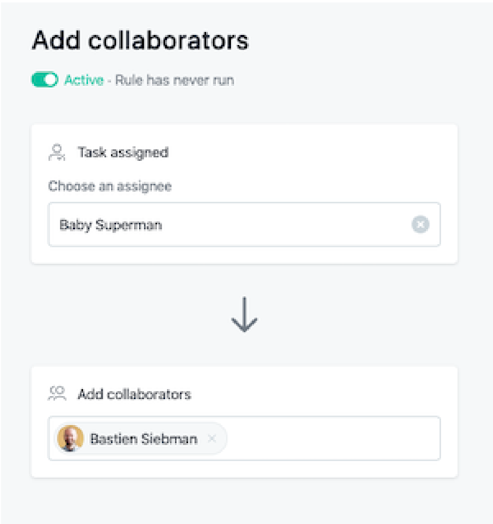
⭐ The Date Equalizer ⭐

- *Goal*: have the due date always match the completion date.
- *Idea*: set up a rule to change the due date to "0 days" whenever a task is completed.
- *Why it's cool*: for reporting reasons, you might need the due date to match the completion date. You are welcome.



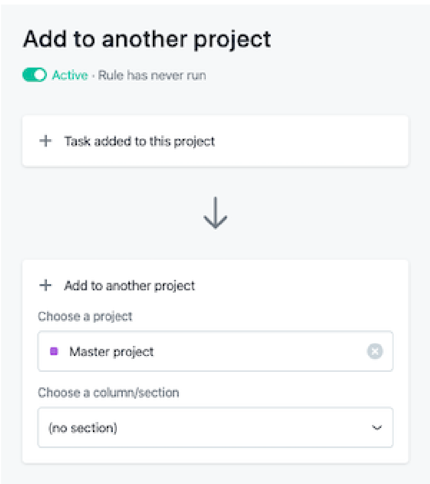
⭐ The Lurker ⭐

- *Goal*: automatically watch tasks assigned to a junior employee
- *Idea*: set up a rule to be added as a collaborator whenever a task is assigned to someone.
- *Why it's cool*: you can quietly watch work without disturbing or stressing anyone.



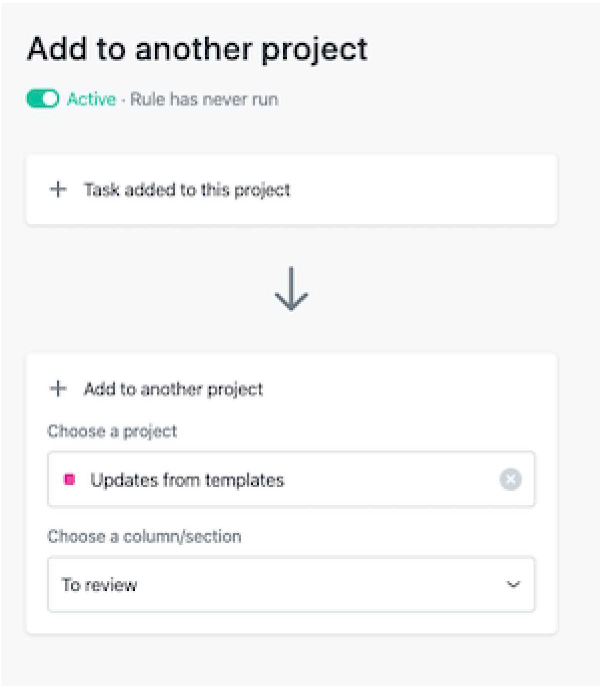
⭐ The Architect ⭐

- *Goal*: automatically build a master project, from various sources.
- *Idea*: in various projects, create a rule that automatically adds any task created to a master project.
- *Why it's cool*: your master project will always be up-to-date with all its children's tasks.



⭐ The Template Perfectionist ⭐

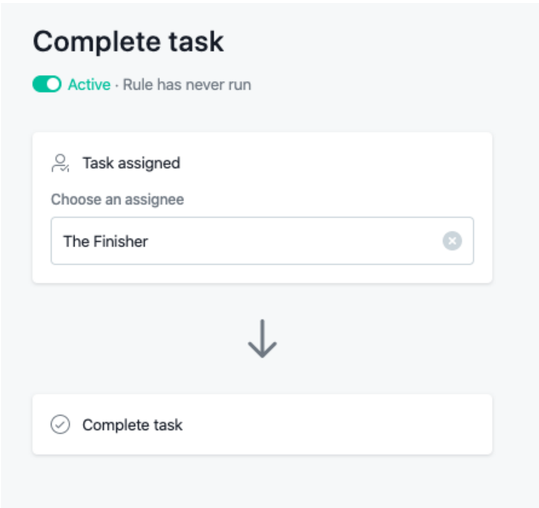
- *Goal*: be notified of new tasks added to a template so you can update existing projects.
- *Idea*: create a rule in a template project to add a new task to a project called « Update existing template implementation »
- *Why it's cool*: when a template is updated, it does not update all projects based on it.

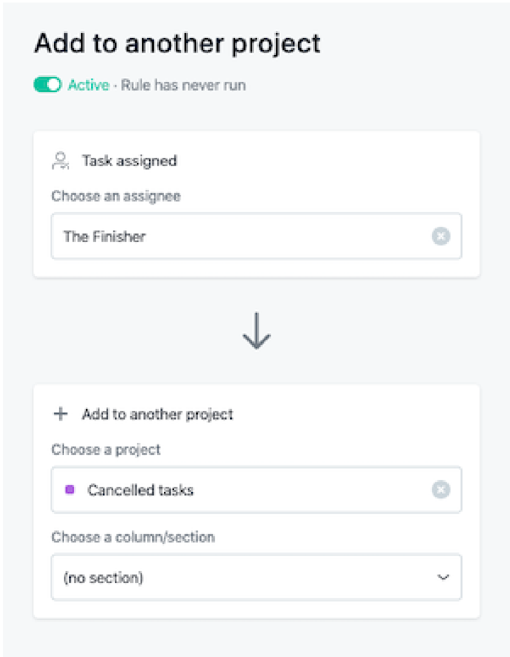


⭐ The Cancellor ⭐

- *Goal*: store together all tasks you were not able to finish and tag with them for a specific reason.
- *Idea*: create a project called « Cancelled tasks » with drop-down custom fields and various reasons. Also, create a user account with a guest email, call him « The Finisher » and add a nice avatar with a superhero mask. Create rules with a trigger « Assigned to The Finisher » and actions are « Mark as complete », « add to canceled tasks project ». Then just choose the reason for cancellation.

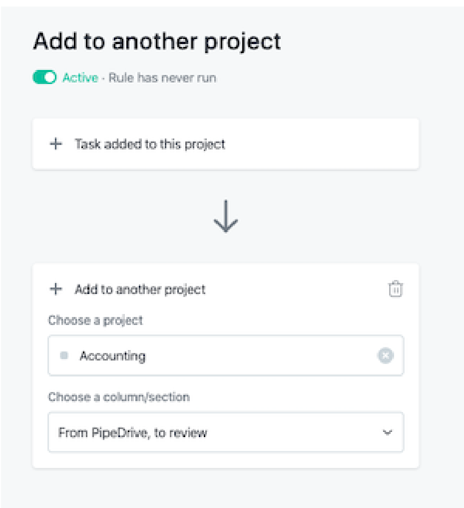
- *Why it's cool*: it will be fun to actually cancel tasks, you'll get a nice cancellation history on which you can run stats.
  Thanks to Larry Berger for coming up with this one.





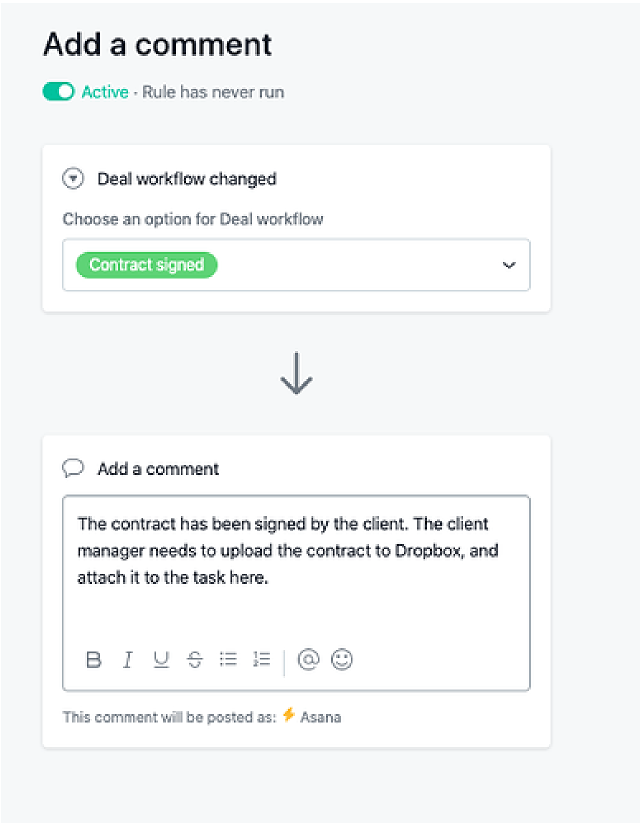
⭐ The Protector ⭐

- *Goal*: when using 3rd-party apps, you don't want to give them access to your whole Asana. For some rules, like « Add task to project » you can use « The Protector » to prevent apps from accessing your whole Asana.
- *Idea*: create a guest account in your Asana with a single project called after the specific use case (like « Zapier PipeDrive »). Connect to the 3rd party with that limited-access account and make it add tasks to the project. From an admin account, set up a rule with the trigger « Task added » and action « Add task to another project » and target your accounting project.
- *Why it's cool*: you don't want to give 3rd party access to everything!



★ The Storyteller ★

- *Goal*: automatically comment when a step is chosen in a drop-down custom field to explain what that step involves.
- *Idea*: create one rule per value in a drop-down field to comment automatically, the comment should include what the step means in terms of deliverables for example or what it involved.
- *Why it's cool*: sometimes it is hard to track the steps a task went through + you might need to keep track of the "definition" of a step at one point in time.

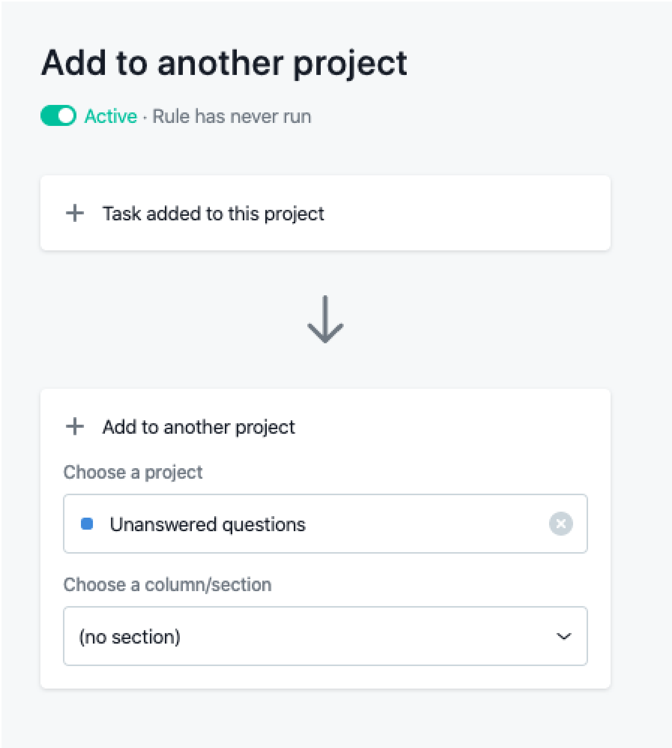


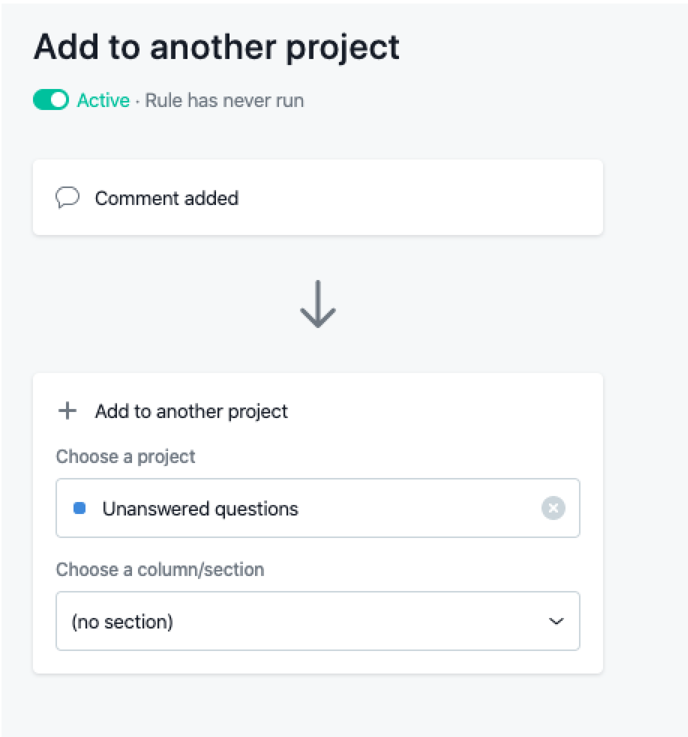
★ The Middle-Man ★

- *Goal*: automatically add to an inbox project any task being added or commented on by a client.
- *Idea*: create a project to hold any task with an unanswered question and create two rules. The first one adds any new task inside your client project to this project. The second one adds any task commented on to this project.

Your team should be notified of any new task coming into the “Unanswered questions” project.

- *Why it’s cool*: because you can be very reactive to client needs!
- inspired by Chris Labatt-Simon





⭐ Out of Office ⭐

- *Goal*: warn people when they assign tasks to you while you are away.
- *Idea*: "Another great one is the "Out of Office". If you're on leave, you can create a rule where if someone assigns you a task, Asana automatically comments with an Out of Office message so people know that you won't see/be able to action a task until you're back. Great for working with clients. And then you just turn it off when you're back." -Ben Fitzpatrick
- *Why it's cool*: enjoy your holidays, Asana got you covered!

⭐ The Gentle Whisperer ⭐

- *Goal*: gently remind people that the due date is near.
- *Idea*: for some projects, respecting the deadline is critical, especially when your clients are involved. The idea is to set up a rule, when the due date is approaching (3 days out for example) you post the following comment mentioning the project manager "You still have time, just wanted to send a gentle reminder that this due date is approaching!".
- *Why it's cool*: there is nothing worse than discovering a critical task is due today and you are missing inputs to work on it. The comment makes it gentle enough to not disturb the workflow of the team.

⭐ The Cleaning Lady ⭐

- *Note*: alternate name is "The Cleaning Dude" obviously 🙂
- *Goal*: remind people that a really overdue task is not acceptable
- *Idea*: if you manage to add every single task to a single project (by having the same reroute rule in every project) you can set up a rule sending a comment if the due date is more than a month overdue. That situation should probably never happen, the due date should be re-assessed or the task completed or deleted.
- *Why it's cool*: a report with manual comments could achieve the same thing, but some automation is nice!

⭐ The Standup Robot ⭐

- *Goal*: automatically fill in the weekly or daily standup agenda
- *Idea*: if your team has a daily standup meeting or a weekly meeting, add a rule to automatically multi-home a task due today (or this week) to the meeting project.
- *Why it's cool*: you won't forget to talk about something due!

Link to this tip's discussion thread in the Asana Forum

Productivity

📢 Tip on how to organize your work in a variety of ways (My Tasks Filtering Workaround)

Jerod Hillard

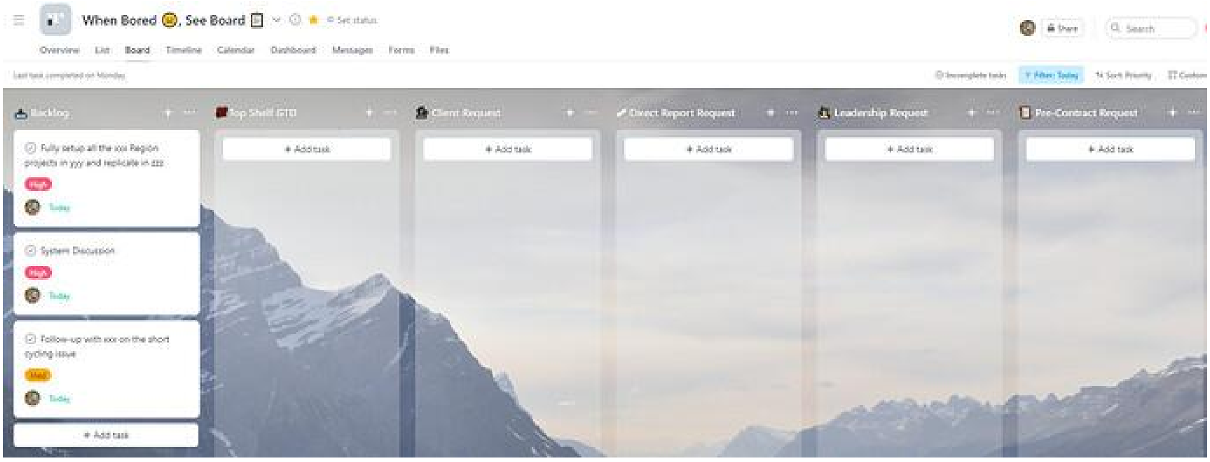
Currently, you are unable to filter in My Tasks v2. For some, this might be a challenge because you find it difficult to see your work with both time, scope, and priority in mind.

As pointed out in a wonderful Asana blog post, the introduction of boards and custom sections now offers more flexibility in how My Tasks can work for you. How this post suggests one might break up their work is by:

- Progress
- Scope
- Work Blocks
- Dates

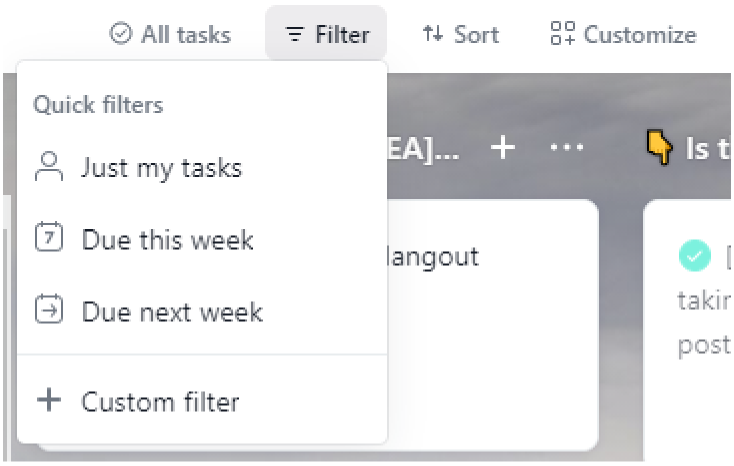
Well... for some, this is a challenge. What if I care about them all but can't choose? Do I have to choose? It isn't always easy or convenient to re-structure your system to see work differently (by scope over time, or priority over scope, etc). Bastien Siebman recently posted a LinkedIn article to share how users can temporarily do something to jumpstart their My Tasks when feeling lost (join the "Asana tips, tricks and discussions with experts" LinkedIn group to get access to the post). I loved this post, but as he put it, this is a temporary effort to produce a more functional, manageable system long-term. In my case, and perhaps many others, more context is always needed to offer the right level of clarity on the work needing to be done. So how might one provide the right level of context?

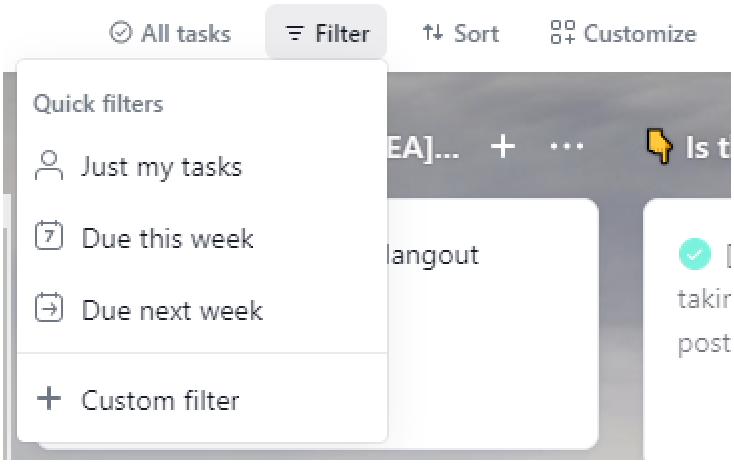
For some time now, I have managed a separate home base project that I call: When Bored 😑, See Board 📋 (shown below) - a bit ironic given this is my main view for work which then suggests I am always bored #fakenews. This is what it looks like:



I can use the project filters to see my work just as I would in My Tasks v1 (Today, Upcoming, or Later) while sorting the cards in the board view to have a high priority on top but then allowing the Sections (Columns) to be the scope (type of work). This allows me to evaluate what REALLY is the priority because for me… scope, time, and priority on their own don't dictate what needs to be worked on first! A combination of those things does!

Here are the due date filter options available on projects (*yet not currently available in My Tasks*):





Unfortunately, this system only offered me control over what I add to this board. It would require a lot of work to manually seek any work to be added that was assigned to me by others. Fortunately, with My Tasks v2, there is an introduction to Rules. So now, I can have anything that is added to My Tasks be added to this Board as a Rule.

⚠️ Disclaimer: To use Rules in this fashion requires a Business or Enterprise plan. The other wonderful alternative would be to introduce Flowsana into your productivity toolkit ⚠️

With the new Clockwise integration, I could even take into consideration work blocks and use that to help me determine exactly WHEN the work can get done!

My ideal scenario would be if Asana would Offer the same filtering capabilities and Custom Fields within the My Task experience.

Preferably, these custom fields would be unique to tasks when viewing from My Tasks or if viewing them outside of My Tasks the fields would be separated/collapsed in some way to show they were not associated directly with the project that the task was being viewed within. This allows My Tasks to be a unique experience while not adding clutter when viewing items from a different contextual lens (the difference between the work that needs to be done in a project vs the work that needs to be prioritized by me).

Link to this tip's discussion thread in the Asana Forum

Productivity

🏁 The number of tasks completed should not be a metric to measure success

Bastien Siebman

During a recent session with a client, a top manager raised an issue with a manager on their team.

The manager in question was confused (and a bit worried) by the fact that in Asana, as a manager, he/she was delegating more tasks than actually completing them. So they were looking for a way to still show their work and how busy they were because the « Completed tasks by assignee » was shining a bad light upon them.

My answer was that I don't believe the number of completed tasks should be a metric of success. Asana is just a tool, you should measure success the way you used to before Asana came into the picture. Everyone has a different way of splitting their work (1 task versus an entire project), and some others, because of their position, are delegating a lot. The success should be measured based on the value delivered (number of bugs fixed, shops opened, revenue...) and not some completion metrics!

Link to this tip's discussion thread in the Asana Forum

Productivity

Create a new Asana task from any browser address bar with task.new

Larry Berger

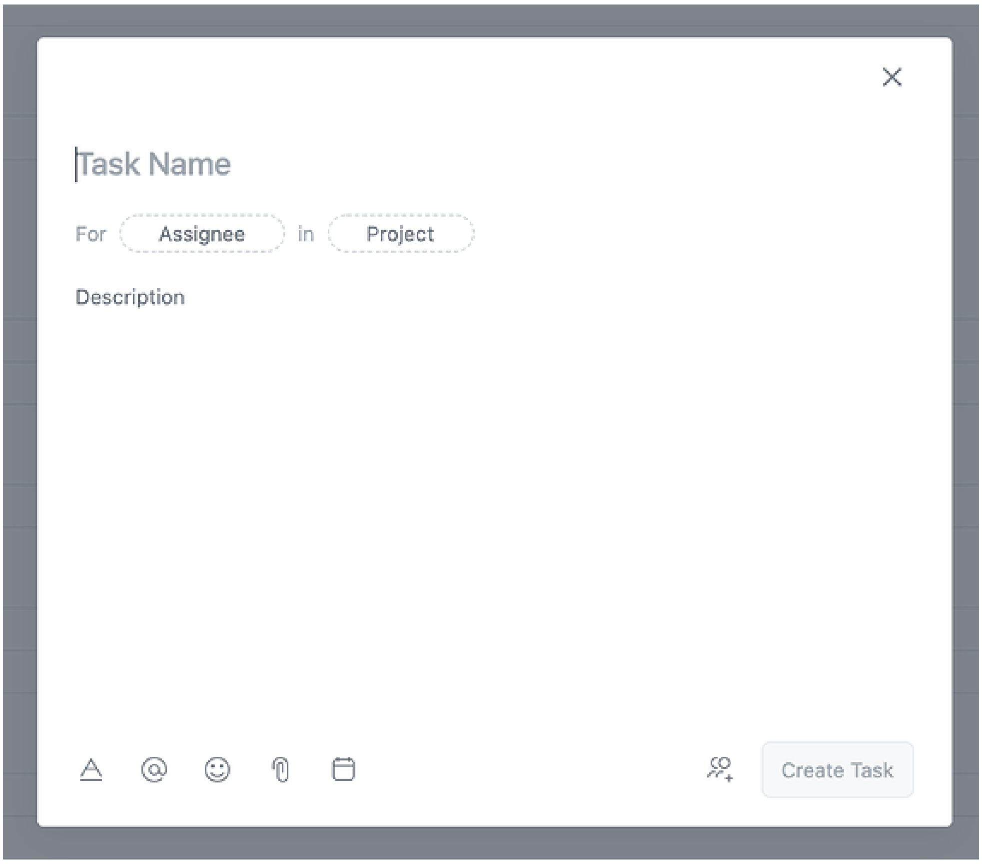
Did you know that in any browser address bar you can type either:

task.new

- or -

asana.new

to create a new Asana task? You'll see this dialog:



This is similar to many other *.new shortcuts that have been registered. They're all listed on the Google Registry whats.new/shortcuts/.

[Link to this tip's discussion thread in the Asana Forum]

Productivity

💡 A bothering situation does not require a bothering task

Bastien Siebman

We've all been there. Something is bothering us and we create a task about it.

In my case, it was that my computer no longer allowed me to read and send SMS without picking up my phone. I created a task « Fix SMS on laptop ». And every day I was seeing the task. And that reminded me it did not work. And every time I received an SMS and could not read it on the computer, it reminded me again.

The thing is: I don't need a task. When that becomes too annoying, I'll do something on the spot. A bothering situation does not require a bothering task. Give that situation a chance to resolve itself, or yourself to adapt.

PS: I am still not sure I fixed the problem, I sometimes get SMS, and sometimes I don't. I hate it, but not enough to spend time to fix it 🙂

[Link to this tip's discussion thread in the Asana Forum]

Productivity

🏝️ Get comfortable with only completing the most important tasks

Bastien Siebman

I know the feeling. You prepare a big to-do list for the next day, with tasks being sorted by priority (High, Medium, Low). At the end of the day, you completed the 3 High items. And the project is almost the same: tons of Medium and Low tasks. You feel bad, you feel like you did not accomplish much.

Get comfortable with only completing the most important tasks! Because if you decided they were a High priority, then having completed them all is a big win! And all those Medium and Low tasks can be done later, or never! Unless they become a High priority themselves.

Remember something: a Low priority task might disappear by itself over time because it isn't necessary anymore 🙂

[Link to this tip's discussion thread in the Asana Forum]

Productivity

Your Simple (or Advanced) Strategy for Asana's Updated My Tasks

Larry Berger

I've published an article to Medium (free access): Your Simple (or Advanced) Strategy for Asana's Updated My Tasks.

I hope both existing Asana users grappling with My Tasks version 2 (currently being deployed), as well as new users to Asana, will check it out because it was written with all of you in mind.

This comprehensive article on My Tasks:

- Outlines a simple but highly functional My Tasks setup with brief, step-by-step setup and use instructions,
- Explores an advanced My Tasks approach–the one I use–that I feel is unique yet has wide applicability, and
- Offers a survey of other "best of" My Tasks approaches. If the previous two examples aren't your cup of tea, surely something here will be to your liking.

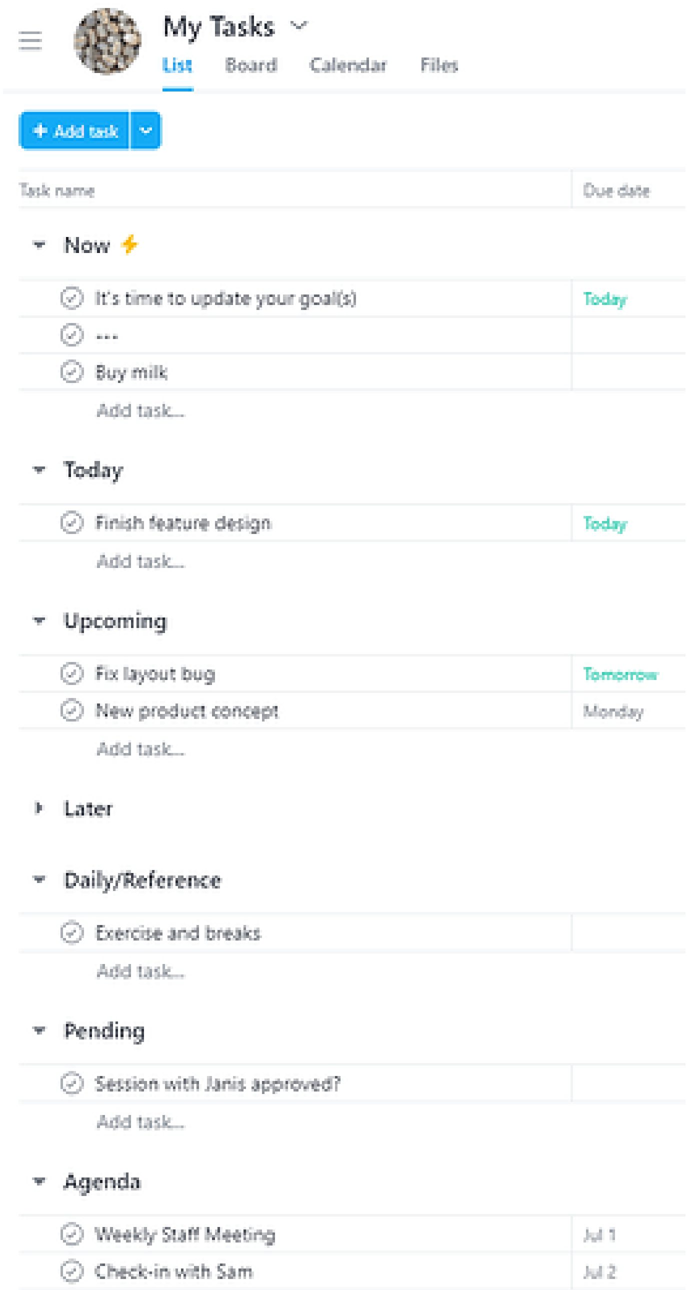
There's more along the way, including a generous helping of tips and best practices.

In summary, the article will give you a quick, simple playbook, along with advanced and alternate approaches, to restore the lost functionality (automatic task promotion) you've been used to (or, for newer users, that you'll want to add) and leverage the new customizations available.

Please also find all my other Asana-related articles (many with embedded YouTube videos/screencasts), at Trilogi Medium articles.

PS Thanks to Phil Seeman and Bastien Siebman for their review of this article.

PPS Here's a preview of the advanced approach discussed:



[Link to this tip's discussion thread in the Asana Forum]()

Productivity

💌 Send emails from Asana

Bastien Siebman

My first AHA moment with Asana was when I understood the power of custom fields and multihoming.

The second AHA moment was a few weeks ago when Paul Minors shared with me his Zapier setup to send email from Asana: that blew my mind and opened a whole new world to me.

With the right configuration in Zapier (called a zap) you can trigger a Gmail email to be sent with content coming from an Asana task. More specifically, I have a task list of clients, each task being a client with a name and email in custom fields. I set up an extra project called « Session debrief ». When I finish a session with a client, I multi-home that task into the session debrief project. That triggers Zapier to send an email to the client saying « Hi client-name » and asking if they can fill a debrief form (an Asana form obviously). So after a session and with only one click, I can send an email and get feedback + testimonials from a client!

I have the same system in place to send a session reminder if a client did not confirm his presence at the event, and also send upsell emails to some hand-picked clients. The possibilities are very exciting!!!

[Link to this tip's discussion thread in the Asana Forum]()

Productivity

💡 Templates can also be “task factories”

Bastien Siebman

Following the discussion with Jerod Hillard on [breaking long templates into stage-focused templates](), I came up with the idea to share the concept of using templates as factories 🏭.

Too often, users see a template as a way to create a project, and then they feel like they need to “stay” with the project. However, a template can be used to only “fabricate” tasks, and then you can move tasks elsewhere. A couple of examples:

- your client process takes a year, you create a template for each stage, and every time you use a new stage template, you move the resulting tasks into the main project
- your blog post workflow involves a task and many subtasks with dependencies, description, assignees... You create a template with a single task and once used, you move the task wherever you want it. (Asana introduced task templates for this)
- you need to generate 150 times the same task. You create one in a template and manually duplicate it 5 times. Then you create a project based on the template and move back the 5 new ones into the original template. You now get 10 in the template. Use the same process again, you get 20. Then 40. Then 80. You just saved many hours of work. You are welcome 🙂

[Link to this tip’s discussion thread in the Asana Forum]()

Productivity

💡 Break long templates into stage-focused templates

Bastien Siebman

Here is my little tip of the day regarding templates, especially the ones taking weeks or months to complete.

If your client's projects are usually spanning across several months and are based on a template, you should consider having several templates instead of one. Try to identify the main stages of the projects (e.g. initial stage, preliminary, design, delivery...) and have one template for each. That way, you'll always start a new stage with the latest fresh version of the template, rather than being stuck with the big template version from 1 year ago...

That is important because Asana does not have a possibility to push template updates to projects that used it!

Link to this tip's discussion thread in the Asana Forum

Productivity

When to Use Asana Project Templates (and When Not To)

Larry Berger

Asana supplies a [vast library of all-purpose project templates] in about a dozen categories that you can access in-app to help you create a new project or just browse freely. Whether you're planning a product launch or marketing campaign, Asana has a project management template to help you organize, track, and complete your next initiative. Explore Asana-created templates and find one for your next project.

These pre-packaged templates are best for beginners because they're generally clear and simple and even include instructions.

More advanced users can benefit by quickly canvassing them for ideas, best practices, and to make sure that their own approaches are not missing anything.

Yet these templates can run out of steam. They're typically rudimentary and only implement single-project solutions as opposed to powerful solutions that require two or more linked projects.

And they tend to be a bit formulaic. For example, many use a High|Medium|Low built-in Asana Priority custom field. I discourage clients from using such a field, which is usually not necessary or requires too much effort to maintain–I try to minimize the number of custom fields at the task level to have to value initially and keep updated for all tasks. I prefer to use either priority order of tasks in list view, Due dates, an "Urgent?" dropdown custom field with a single option of a checkmark (✔), or another approach.

But I do appreciate and employ browsing the template gallery for ideas and to make sure I'm not missing something in my own custom projects, though I rarely use these templates themselves for actual projects. Creating your own custom projects will deliver better results, and takes little extra time in most cases.

Link to this tip's discussion thread in the Asana Forum

Productivity

Managing My Tasks for V2 Greatness (One way to overcome data overload in My Tasks)

Jerod Hillard

This post is specifically for those that are legacy users or finding that there is a lot of clean-up needed in their My Tasks to take full advantage of the new experience. If you don't fall into those categories, you likely don't need to take any additional steps to make the most of V2. Cheers 🍻 to you! 😉

For me, I was witnessing a lot of lag when My Tasks was being loaded. I believe this is primarily due to data loading differently than it had in the past *AND* the fact that I had 14,855 tasks assigned to me. 🙄

It would seem (*and I might be wrong here so welcome any technical details others have to support or refute these points*) the following to be true:

- You aren't able to collapse Sections that contain more than 1,000 tasks. Historically, this limitation wasn't present. You could collapse Later which often held tasks for the future and those users weren't interested to see auto-promote. It was a fancy parking lot that didn't introduce any latency when loading data. If this is something you want to see reintroduced, you can upvote here: [The ability to collapse Later in My Tasks V2 when having > 1,000 tasks]()
- Data contained within a Section where the task count is < 1,000 tasks seem to load whether the Section is collapsed or not. I don't recall experiencing this delay previously. This seems to be the case because when I expand a Section the data seems to show in full (no additional loading prompted by scrolling) and is relatively responsive.
- Data contained within a Section where the task count exceeds 1,000 will only load a portion of the tasks - usually the first 100 and then another 100 as you scroll further down the page. This is preferred IMO but it seems to cause some issues when multiple Sections have more than 1,000 tasks or when these types of Sections are not listed last.

After fumbling around for several days, I had to come up with an alternative approach to get My Tasks to a usable state (*I relied too heavily on the data in My Tasks for it not to serve me well*). I tried creating additional Sections, [moving tasks around in bulk](), and reordering Sections from the Board view. These actions helped in some ways and made matters worse in others (I started to get sync notices and error messages which then forced some rework). I needed a new approach. Ultimately, this is what I found to work best and what I would offer to those that can relate to my experience:

1. Create a new, private Project called “Rainy Day”
2. Add the Rainy Day project to any task that a) has no due date, b) is past due that you don’t want to address immediately, or c) is assigned to you and either doesn’t require an assignee or can be delegated
3. Once these tasks are moved to the Rainy Day project, remove yourself as an assignee.
    - Removing yourself will remove these tasks from My Tasks
    - You can filter the Rainy Day project to only show those tasks assigned to you as you work through the effort of removing assignments in bulk (50 at a time). You can then later save your default view without the filter.
4. Once you get My Tasks to a manageable state you can set it up the way you prefer and start taking action. Perhaps this previous post can help get you started: [Today is my “My Tasks V2 Day” so where should I start?!?]
5. Plan to visit the Rainy Day project on occasion to work through any actions that need to be taken. I would recommend setting up a recurring task to serve as a weekly or bi-weekly reminder. 😉

My final bit of advice to make this effort less painful and to save some time: open a separate browser tab and perform an Advanced Search for all tasks assigned to you that are NOT in the Rainy Day project. While you are adding tasks to the Rainy Day project from your My Tasks, you can simultaneously be doing the same through this Advanced Search. This certainly helped because as mentioned before, My Tasks would often give me an error because of all the data it was having to process. Tip of the cap to Bastien Siebman for affirming this extra step! 🙇

Today, I’m experiencing V2 the way it was intended! The less data you have in My Tasks the better the experience. This is a nice indirect reminder to delegate work or better manage what can be achieved when. That said, I hope to see some improvements in how quickly data loads (confident it gets better over time).

[Link to this tip’s discussion thread in the Asana Forum]

Section 2: Collaboration

Collaboration

3 main steps to onboarding a new employee in Asana

Bastien Siebman

If there were only 3 things to do when onboarding a new employee in a company using Asana, that would be:

1️⃣ Add them to the relevant teams & projects in Asana. I very often see new employees not being a member of any team or projects and as a result just creating tasks not attached to anything.

2️⃣ Encourage them to disable email notifications, teach them to use the Inbox properly, and ask them to fill in their name, role and profile picture.

3️⃣ Make sure they master My Tasks view and check their task list regularly - you could assign a “champion” to them to help!

[Link to this tip’s discussion thread in the Asana Forum]

Collaboration

What if a friend invited you to an Asana-themed amusement park as a Guest? 🎟️ This tip highlights the rides you aren't tall enough to ride! (Guest Restrictions)

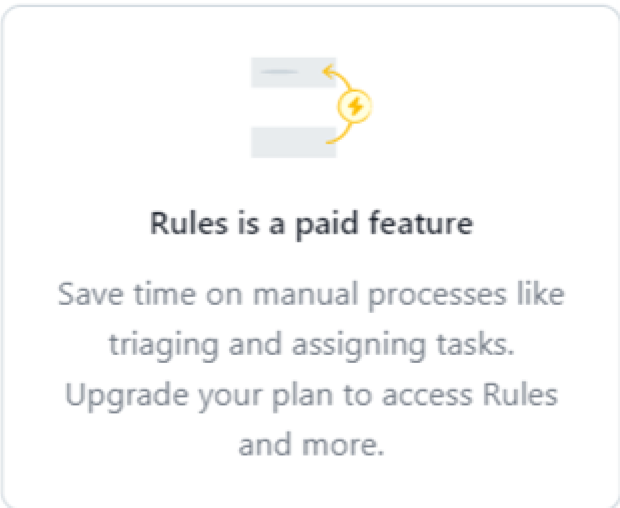
Jerod Hillard

Have you ever wondered what kind of restrictions are in place for a Guest of an Organization? One outstanding differentiator of Asana is the level of access that a Guest has. 🤩

One thing I won't cover is what a Guest can and can't see 👀. That is covered beautifully in a previous post by Bastien Siebman: [Who sees whom, a guide to guest visibility with Batman & Robin].

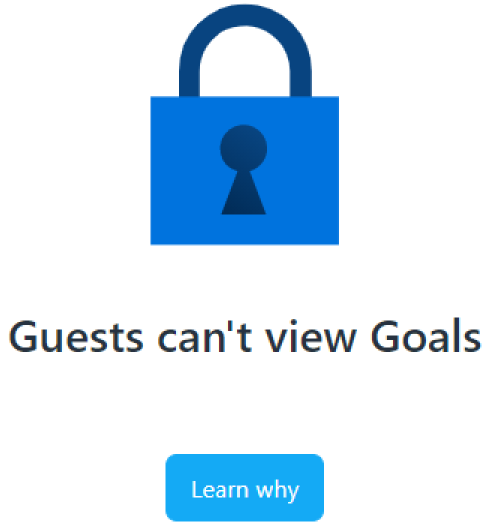
In this posting, we will look at the few things that a Guest **CAN NOT** do. Guests should have access to all paid features in an Organization or team they're invited to, **UNLESS** listed below (assuming I'm not overlooking anything):

- **Unable to Create a Team**
- **Unable to create, edit or delete Rules**



- **Unable to create, edit or delete Task Templates in a project**. They can't even see where this would be done in the Customize menu as only Fields and Apps are visible. While those limitations exist, *they are able to create new tasks from an existing Task Template.*

- **Unable to view Goals** (although the option does still appear in the navigation pane)



The guide explicitly states that if someone receives a link to a Goal they will be unable to access the Goal if a guest in an Organization. Guests cannot view Goals and cannot be added as an owner or collaborator.

- **Unable to create, edit or delete Custom Fields**. Users are only able to input or edit the values of existing custom fields that are already available to them.
- **Guests can not search for Custom Fields using the Advanced Search tool**. There are a few exceptions to this condition.

    1) If a report is built using Custom Fields, a Guest can still see the results AND refine the search criteria within the Advanced Search Tool. Even though they can't search for these Custom Fields themselves.

    2) When using the Advanced Search tool, a Guest will be able to see 5 of the recent Custom Fields within an Organization. While they can't search for any Custom Fields, for some reason a limited number appears and can be selected to build a Report.

- **Within a Portfolio, there is not a “Fields” option visible to Guests**. This means that Guests aren’t even able to trigger Custom Fields on/off... like they can from within a Project.
- **Within a Portfolio, Guests are unable to “add Effort” in Workload**; however, they are able to see what Custom Field is defining the effort as it is listed in the hovercard presented when placing your cursor over the trended

tasks for each user.

I hope this is helpful for anyone curious what restrictions a Guest may have when invited to work within your licensed space!

⛑️ HELP! ⛑️ If you uncover a restriction that isn't mentioned in this post, please don't hesitate to leave a comment below.

⚠️ These restrictions were last reviewed on 6/10/21 on the heels of the Universal Reporting Launch.

[Link to this tip's discussion thread in the Asana Forum]

Collaboration

10 things I learned about Forms

Bastien Siebman

I have been working a lot with forms lately, and thanks to my favorite client (they will recognize themselves) I also learned a ton! Here are my key takeaways around forms.

1️⃣ If you need to ask for a list of things, like diplomas for an application form, then start by asking about their first diploma and include a question "Do you have another diploma?" and branch the "yes" answer to a new set of questions and so on.

2️⃣ Each question is given back with the answer inside the task as a result of a submission. But the question description isn't so make sure your team does not need to see the description along with the answer to make sense of the data.

3️⃣ I am a big fan of emojis and I believe they make a form cool and fun to use. Place an emoji in front of the questions. Be careful though to not offend people: an old man for a question about age or a man (not along with a woman) for a gender question might be a bad idea.

4️⃣ I reached the limit of the branching mechanism and the magic number is 5: you can't nest more than 5 branches.

5️⃣ The biggest form I created so far had 120 questions, no technical limit in sight!

6️⃣ Make sure to connect questions to existing custom fields if you want to sort submissions based on that value later, or filter, or just export the submissions as a CSV and have the freedom to do whatever you want.

7️⃣ You can't connect a "multi-select" question to a drop-down custom field. If you need to ask for several values, one solution could be to use a drop-down question with a "Multiple values" option that shows a text field for free input.

8️⃣ If you need to have an "I agree" or "I understand" checkbox, you can use a multi-select question with only one option. And make it required.

9️⃣ If you need to ask for a number and a currency, you don't have much choice: ask for the currency in a drop-down, or ask for the whole value in a text field.

🔟 For your information, if the field you connected to the title of the task (using "Select a field for task titles") is left blank, the name of the project will be used.

✳️ Bonus: most forms include “big” sections with explanations like “Part II: personal data. bla bla bla”. You can’t create sections in a form, but you can have a question of type 8️⃣ 👆

[Link to this tip’s discussion thread in the Asana Forum]

Collaboration

💍 One single form to rule them all

Bastien Siebman

When an organization starts looking at forms in Asana, that usually opens up a new world for them. I think this is one of the most underused features of Asana, to be honest!

But at one point, managing several forms could be complex. And it is even more complex to keep track of all the forms, where they are, and what is the link to share them.

A solution is to merge several (simple) forms into a new one. The trick? Add the first, question in the form, being « What is your request regarding? » and based on the answer from that drop-down, use the branching mechanism to show the appropriate next questions. Then use Rules to move the submission into the right project so the right team is notified.

PS: this idea was initially shared by Larry Berger on the forum!

[Link to this tip's discussion thread in the Asana Forum]

Collaboration

How to have multiple forms for one project

Phil Seeman

Are you one of the many Asana users who would like to have the capability of multiple forms in one project?

This popular request is discussed [here in the Asana Community Forum](#).

But there's a workaround you can use to have this ability now. It uses the [multi-homing capability](#) of Asana.

Say your main project where you have a form set up is the Work Requests project. And let's say you have two types of work requests, *Software Requests* and *Hardware Requests*.

You can set up a form that captures one of these, let's say *Software Requests*, in the Work Requests Project.

But in addition, say you want to have a different separate form for *Hardware Requests*.

What you can do is:

1. Create a second project, called Hardware Requests.
2. Create a form in that project which captures *Hardware Requests*.
3. Create the following rule in that Hardware Requests project:

    If a task is added to this project, then add it to the Work Requests project.

This rule will "multi-home" the task that gets created in the Hardware Requests project so that it is also in the Work Requests project.

Then just provide the links to both forms as options for people to use, depending on what type of request they have. Voila, multiple forms going into one project!

And you can replicate this process as many times as you need, to have as many different forms as you need going into one central project.

It's a workaround for sure and not ideal, but it'll work.

In terms of creating this rule, you have two options:

- If you have an Asana Business or Enterprise subscription, you can create it using Asana's *custom rules* capability.

- For those without that subscription level, you can use Flowsana's rules, which work with *any* Asana subscription level. (Disclaimer: I'm the author of Flowsana.)

Link to this tip's discussion thread in the Asana Forum

If the Form Editor was a 🍪 cookie jar, how might one keep hands out of it?

Jerod Hillard

Today any member of a project that has edit rights can modify the content within Project Forms. Since there aren't any form-specific permissions, this could create some complications and perhaps introduce some confusion for those that aren't as familiar with the feature. In this tip, I will describe a scenario and offer 3️⃣ suggestions *for better form management.*

In some instances, it might be by design to 1️⃣ **provide placeholders within the drop-down options of a question**. Say for instance a team is using a Custom Template to collect information from the field where a form is leveraged to standardize the data entry. As such, a part of the prescribed workflow might be to require users to pre-populate certain areas of the form for the scope of their data capture.

How might this be achieved if we want to limit the interactions users have with the Form Editor?!?

The answer lies within Custom Field mapping. As seen in the GIF from the link, you can 2️⃣ **connect drop-down options to Custom Fields within the project**. If the fields are set up properly for the scope of a generic project, a template can be used which then allows users to customize the options within said fields. Users can then be instructed to edit fields from the customize menu or column header. If a user *was* to attempt to change the drop-down options from a form, they will be sent back to the same field editor. They won't be able to simply introduce a new option to an already connected custom field that provides a nice layer of control.

Disclaimer: this is one of the few instances where our org will purposefully not add this field to the org library. This is done because this field is meant to be modified to suit the needs of a specific project and not to report aggregated data.

Wait... hold the phone ☎️... rewind the clock 🕥... you might be asking, *why might one want to limit the user interaction with the editor?!?*.... Well... without form permissions, if your experience is anything like mine, a decent subset of users mistakenly will try to submit form data through the editor 🤦‍♂️ ... creating unnecessary rework!.. It's true... it happens... For this reason, when it comes to Forms we prefer to

3️⃣ **ONLY advertise the Form Link and we avoid drawing any unnecessary attention to the Form tab which contains the editor**.

Be the change, vote for a better tomorrow here: [Forms] Ability to manage Forms permission 😉

Link to this tip's discussion thread in the Asana Forum

Collaboration

🤟 3 reasons why you should mention someone in a comment

Bastien Siebman

The simple act of mentioning someone in a comment has more implications than you might have thought.

1️⃣ It adds the mentioned user as a collaborator. Meaning they get notified right away of the comment and will be notified of any new activity on that task. Unless they remove themselves (and they often should reduce the noise).

2️⃣ It makes it clear who you are talking to, especially when there are several collaborators involved, and if you have several times the same first name.

3️⃣ Mentioning someone that is already a collaborator is also a way to save a tiny bit of the energy required to check if that person was already a collaborator. Mention them anyway, worst case scenario they were already there, best case they weren't and you brought them back!

[Link to this tip's discussion thread in the Asana Forum]

Collaboration

What I learned about divisions 😅

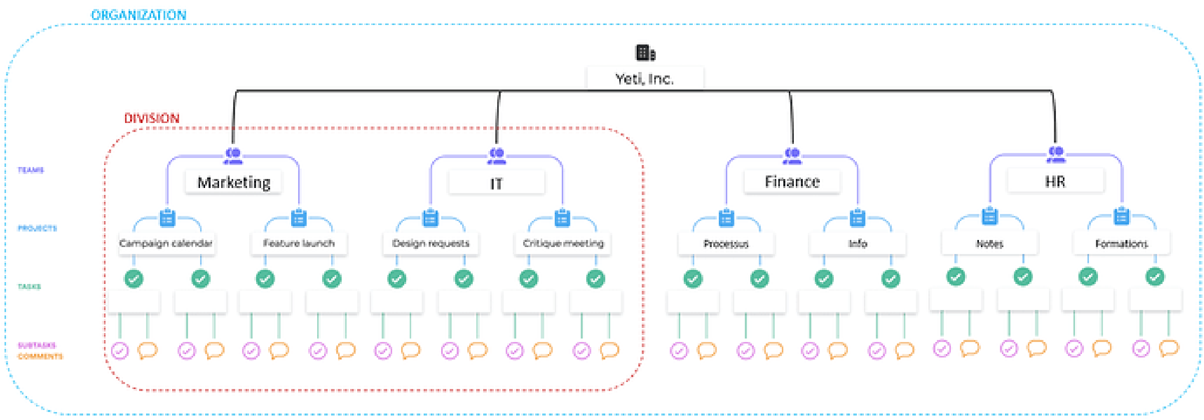
Julien Renaud

Workspace, organization, division, we've all heard about it!

But "division" is not the easiest one to understand 😅

📢 So here is a summary of everything I have discovered over time on the subject!

As an introduction, here is a quote from my friend Jerod Hillard, which is both a good summary and a good teaser for the rest of the post: "a division is like a collection of teams within an existing Organization, but with some exceptions".



❓ Why would one WANT to use divisions?

Several reasons:

- having a division allows for a family-owned business to exist within a larger conglomerate
- need for separated invoices
- this is the only solution to have teams from various paid plans with the same email domain
  ** A "free" classic organization can have a Premium or Business team, but only 1. From 2 it creates a division.
  ** A "paying" classic organization cannot have a team from another tier, except by creating divisions.

❓ Why would one NOT WANT to use divisions?

- when groups of people need to collaborate. With divisions, they would become separated through this structure. The result is either they don't collaborate or you're stuck paying for them to inefficiency operate in two places.
- hard to manage

💰 Billing

A division has its own billing and billing owner, separated from the organization.

👥 Teams

In a division, you can create 2 types of teams: private or membership by request.

You can't create a public team as you could in an organization.

You will have to manually invite everyone if you want to create a team open to everyone. This will also have an impact on who can see what, as access rights will limit or not the visibility of portfolios, projects, tasks, … This requires a single dedicated effort to make sure everyone has the right level of visibility.

You can delete a team that you have created but you must first remove it from the division through the Admin Console. Once it is no longer associated with the Division, you can delete it from the 'Advanced' section of the Team settings.

✅ Assigning a task

You can assign a task to someone from another division (in the same organization), and the person you assign a task to will not count as a member of your division. Then you will not pay an extra license. The autocomplete will show everyone from the entire org.

🚨 **BUT** if you invite to a team or a project a person from another division then he/she will count for an additional license.

=> Collaboration is not easy between divisions, because if you don't pay extra licenses then the others see only the tasks they are collaborating on, and not the whole project.

📚 Portfolios

A portfolio can't see the projects of another division, because you are not a member of the project, or you have to pay for an extra license, which means that you have to pay in both divisions.

If you want to create a Portfolio with projects from “only” the division you belong to: you just need to be a member of the team or a member of the project. No impact on the number of licenses.

If you want to create a Portfolio with projects from “several” divisions:

To add a project into a portfolio, you need to see the project. But in a division, you have to be a member of the project to see it (if it is in the other division: as explained above 👆).

Thus, you need to be a member of the projects, meaning you have to be in both divisions, and then have to pay for 2 licenses.

Jerod’s tips:

Once you have added all the projects into a portfolio, the boss has to be in all the teams of the projects he wants to see if he wants them to appear in his portfolio view.

So as it pertains to Portfolios, we have a system (somewhat manual) where we add necessary projects to a variety of Portfolios. Depending on the users and their role within a Team/Project they may (or may not) be able to see what they need to see.

For a boss, they are usually a full team member so they always see what is in the portfolio.

For individual contributors, we will often make them project-specific members. This way they only see the projects they are associated with in the navigation pane and from the Portfolio.

As you work up from the bottom (individual contributors > managers > directors) the visibility widens. Managers will often be Team members of their team but not others. So they too only see their work. Where the boss can see all teams. All of this is often managed in a single Portfolio that just happens to only show what the user needs to see… with the boss and other leaders having full visibility.

This reduces the noise and makes the navigation and use of the Portfolio better for users as well.

So it all just boils down to making sure the project-specific members and full team members are set correctly across everyone. The rest works itself out.

💻 Admin Console

Almost the same as for an organization, except that some features are not available:

- Can’t do some of the little things like editing a user’s profile)
- Cannot have service accounts; must use personal access tokens.

- Admin cannot deactivate a feature where a user can invite another user.

Thanks, Jerod Hillard, Bastien Siebman, Larry Berger, and others for helping to understand all this 🙂

Link to the Asana Guide: Les divisions · Asana

🔍Ongoing investigations

- Is it possible to have several divisions, but with the same billing owner? or do we have to choose different ones?

Link to this tip's discussion thread in the Asana Forum

Collaboration

💡 The first task in a project as a workflow task?

Bastien Siebman

Projects in Asana can have various workflows. One project could require people to complete tasks when done. Some projects require them to use the status field available, and never complete tasks. Others could have a status but the last value is replaced by actually completing tasks.

This could be confusing. Stop the confusion now and include a "ℹ️ workflow explained" task as the first task of the project! The task will hold an explanation of how the project needs to be used. It could also be written inside the project's description.

[Link to this tip's discussion thread in the Asana Forum]

Collaboration

🏠 An Asana project is like a room in a house

Bastien Siebman

An Asana project is like a room in a house. It should be enjoyable to be inside it otherwise that room will never welcome anyone.

Treat your projects with the attention they deserve. Have a clean workflow. Create nice custom fields with clear names, colors, and emojis. Make sure your project adds useful custom fields to any task added to them so people will want their task to be in them!

For example, if you want to have a project that holds all meetings, you need to “attract” all tasks representing a meeting. Adding your meeting task to that project should bring you value, not cause you extra work. The project should have a nice name like “📅 Meetings”. And most importantly, it should have useful custom fields like a room number with a drop-down of all meeting rooms in the building. A Zoom room number field. A meeting date field, separate from the due date. A duration field. A meeting report status with values like “Choose a reporter”, “Report to write”, “Report to share”…

Turn the paradigm around: do not force people to add tasks to projects, but make those projects so good people won’t have a choice!

[Link to this tip’s discussion thread in the Asana Forum]

Collaboration

Keep your (remote) team motivated with the help of Asana - A to Z

Andrea Mayer

A question many project managers/ project leaders and others keep asking themselves probably a lot of times is „How do I keep my (remote) team motivated?“

Especially due to the lockdowns over the past year many companies had to restructure their work environment which I know has been quite a struggle for many.

I am used to working with remote teams for years so I thought I‘d share some tips and tricks that help me to ensure the team stays motivated 🙂

[A] - Asana ⭐

The most important rule is to ensure your team members understand why Asana and why it is so important to add all tasks there and they need to learn how to use Asana efficiently.

During the onboarding process of new team members, they would have to go through the Asana tutorials: Video Tutorials: Tips & Tricks 20 and also specific Asana videos we prepared explaining our specific processes and set up.

This is definitely not something that can be achieved in one day. It is a process and you or a coordinator needs to be by their side to guide them. If you already know your team well you understand who needs more hands-on training and who just needs a little bit of guidance along the way.

You definitely have to avoid overloading people with features and ensure to slowly introduce them to more. Only then they will really get to love it and are eager to improve 🙂

Now I could be talking about this topic for much longer but this is probably best kept for a separate post 😉

A1) Ensure every team member adds a profile picture

A2) Ensure your team knows how they can customize their Asana background and show them the dark mode feature so they can customize Asana the way they like it best 🙂

You might also be interested in upvoting here: Custom Backgrounds 18

A3) To avoid frustration, caused due to the high amount of Asana task notification emails they might get, help them to set up a filter in their inbox to separate Asana tasks updates and other company emails or (and this is what I would suggest) have them disable the email notifications 2 and instead keep the Asana inbox open in a separate window or the desktop app.

[B] - Birthday Congratulations 🎂

Whenever somebody starts working with us we also ask for their birthday. I keep a calendar of all birthdays in my Asana and whenever one comes up I would send a message in the main newsletter Asana project with congratulations and a gif.

This way all other team members are reminded too and send their wishes + often also fun gifs and pictures.

The team is really enjoying this so far.

Example:

[C] - Company Culture 😊

Every company operates differently and has different values and guidelines.

It is very important that these are clearly communicated to everybody joining the team to avoid any confusion or miscommunication down the line.

Especially for remote work, this is important, even more important when team members from different countries with different cultures work in your company.

[D] - Do‘s and don’ts of effective communication 🗣️ 💬

- Ensure this is part of your team culture and address these points with your team regularly as communication within the team is key! Especially for remote teams, this is even more important.
- Be a good listener 👂
- Express negative thoughts in a positive way. Negative communication can be demotivating and hurtful. (So for example instead of saying „Don‘t do this anymore“ rather say „I see where you are coming from, however, based on the outcome I suggest changing the approach next time and rather perform this task differently“)
- Be open to receiving and giving constructive feedback
- In case of any miscommunication often a short call is recommended to sort out things quickly (Too often I have experienced miscommunication due to different cultures. For example, somebody from Australia uses a typical saying, however, a team member from another country is not familiar with that at all and feels offended)
- Don’t interrupt people when they are talking
- Don’t overcomplicate your message.
- Don’t be defensive or offensive – stay neutral
- Don’t criticize in public.
- Don’t shout or talk too fast.
- Avoid floundering. When you do decide to speak up, make sure that you’re prepared to be clear and concise.
- Learn to avoid using filler words such as uhh and umm. Nearly everybody does this at times which is okay as long as it does not get too much. This is probably one of the toughest bad habits to break.
- When in a meeting don‘t try to multitask. Stay focused and take notes.
- If on video call: Maintain eye contact

[E] - Emojis 🥳 😜 😍 👌 👍

Use emojis when communicating with your team. Again don‘t overdo it but an emoji now and then can put a smile on people‘s faces.

[F] - Freedom 🪁

Give team members autonomy.

Granting autonomy shows you trust your team members → push in motivation and once they complete something successfully they get a feeling of accomplishment.

- In the long term it helps you build self-sufficient teams as they learn to create their own processes.

[G] - Goals 🎯

When we are talking about team motivation then „Clear Goal Setting" is definitely something that should not be missed.

Setting specific and clear goals leads to greater output and better performance.

Also, ensure to break big goals into more manageable chunks.

[H] - Happy Monday - Happy Weekend 💼 😎

H1) Motivational Monday

I have recently started sending a message via Asana to the whole team to wish them a great start to the week. I am also always sending a fun gif or a motivational message such as the below examples:

Now it is important to come up with different messages and gifs so the team does not know what exactly to expect.

Examples:

Good Morning - Let's Rock This Monday!

Started 3 days ago by @Andrea Mayer

Andrea Mayer 3 days ago 11

Good Morning - Let's Rock This Monday!

Andrea Mayer 3 days ago 4

Happy Monday!!!

H2) Happy Weekend Message

The same that I do on Monday's I do on Friday as well. Often I attach a fun video too.

Example:

[I] - Ideas 💡

Encourage your team members to come up with and share ideas.

In our company, we have an idea column in every project. Could be ideas related to Marketing, Website Landing Pages, Social Media, etc.

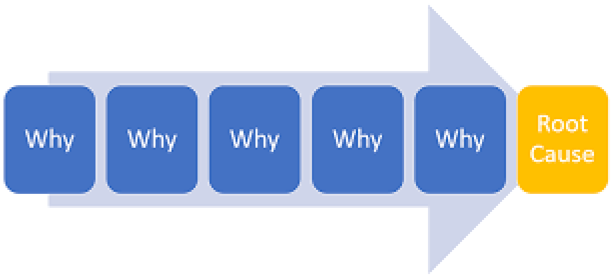
Whenever a team member comes up with an idea or finds something interesting in an article they read or video they watched they would notify their coordinator who then creates the task in the relevant Asana project and discusses it with the team in order to decide whether it is worth testing or not. (Or the team member creates the task directly and assigns it to the coordinator)

[J] - Judging 🤨

Don't judge team members purely based on the results of one task.

Often we tend to be very critical when mistakes are made one time, although 9 out of 10 times things are done correctly.

Whenever mistakes are made, speak to the team to find out why (5 WHYs 8).



We are all human, sometimes maybe personal issues, unrelated to work did impact the result or maybe there is a clinch between team members you were unaware about.

[K] - Knowledge Base 📚

Set up a company Wiki that covers everything your team needs to know or might need to look up at some point in time. Such as all infos on the services/products you are selling, how the invoicing and payment process works, what to do when they want to take time off, etc

Here you can also add all the SOPs/ Work Guides created.

[L] - Love ❤️

Show your team appreciation:

L1. I feel that showing your team enough appreciation often comes a bit short with remote work. Especially when people or let's say leaders in a company/ coordinators/ PMs are not really used to remote work yet.

And then on top of that add that they are stressed and super busy and managing xx team members.

So I recommend setting a recurring reminder task for yourself regarding this matter so you never forget this. If you have a big team maybe split it into groups and every 1-2 weeks pick a few team members.

Even a personal thank you with a smiley 5, short voice msg pointing out a special achievement will help you to push the motivation of your team.

That does not mean you should not also be strict when it requires it.

L2. Asana has some lovely [appreciation stickers] 1 as well

L3. Use GIFs now and then. Don't we all love them? 😉

A funny gif on a stressful day can really do wonders I believe.

People will work for recognition and opportunity more than they'll work for anything else. - Marcus Lemonis

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[M] - Meetings 🙋

Ensure meetings are efficient.

Team meetings are important but not always necessary.

Set clear guidelines on when team members should hold meetings and when they are not needed. Why? Because otherwise, they might end up scheduling xx meetings without any real or low outcome as this is also super demotivating if nothing could be achieved.

A few key rules we set:

- Before arranging a meeting the coordinator has to evaluate whether it is really needed or the topic can be quickly discussed via the Asana task directly (which has proven to work in most cases also because often it is anyway difficult to schedule a call due to different timezones).
- Set a clear agenda that is placed into the meeting Asana task
- Set a clear max time for the call
- Define a meeting leader and somebody who will take notes and later prepare the action steps in Asana
- Ensure that the meeting starts with providing an overview, then discussing the planned topics, question round and at the end a summary.
- If the meeting tends to go off topic the meeting leader has to step in (That does not mean that there shouldn't be any jokes made or fun stories told - this is important also sometimes, however it should not go into the extreme as I have experienced this a lot of times already that meetings that could be completed within 15-20 minutes ending up taking nearly 1h with no extra value provided
- You can also connect Zoom to Asana so the recording is automatically added.
- Evernote or Google Docs can be used for meeting notes or you can directly add the notes in Asana with all action steps as subtasks

Here is a meeting Asana project template: Meeting Agenda Template - Staff, Formal, Kickoff • Asana 1 and you can find more templates on Templana

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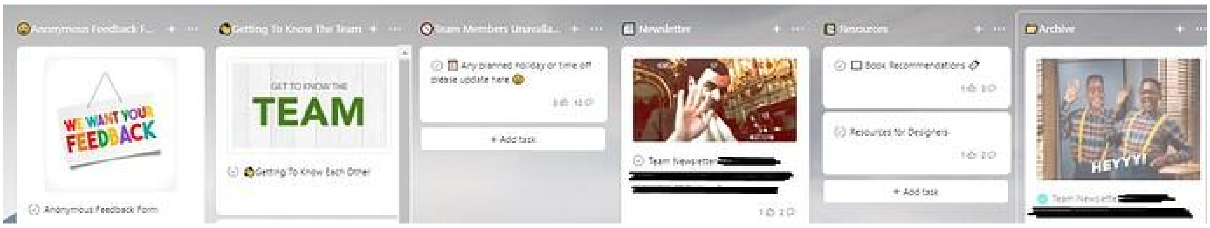
[N] - Newsletters ✉️

In our team, it has also proven to work well to have one main Asana project that covers the key things such as „Anonymous feedback form“, „Unavailability of team members“, „Getting to know the team“, „Newsletters“, „Useful Programs“

I call it „Team Newsletters“

The way I set it up is that only I have edit access and all team members have comment only access + I ensure that notifications are enabled so everybody receives any updates I post or messages I send via this project.

Here is how I set it up:



N1. Company-wide announcements

This way I can also send company-wide announcements very easily and I even stopped using emails for these because in Asana I can track who marks the message with thumbs up so I know they read it.

Now don‘t assume everybody in the team will read the msgs or mark them with thumbs up.

1a) you have to inform your team that you need them to mark these messages with thumbs up, because they are sent for a reason so everybody should read them.

To ensure you are aware of who did so the thumbs up is great.

Things won‘t always run smoothly, be prepared for some „special candidates“ as I tend to call team members that need some extra push or special treatment/ one on one calls to have them understand WHY this is important.

N2. Regular company newsletters

We have started doing this years ago in our company based on feedback we have received from our team members that they would like to receive more insight into company areas/projects they are normally not involved in.

For example, the customer support team would communicate with the marketing team regarding some specific things such as promotions, new product launches etc

There is always a connection between various teams, however, somebody working in CS most often won‘t know specifics on which marketing campaigns worked really well and why. Or somebody from logistics might not know about awesome feedback or testimonial video a CS team member received from a customer.

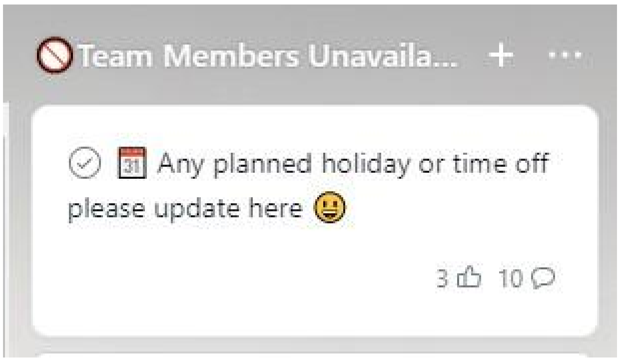
Why is that? Because everybody has their expertise and therefore works in specific teams and on specific tasks.

Now to give you another example: I work for a CEO that owns various companies: B2B and B2C. This means that the majority of team members working on the B2C side don‘t know what‘s going on on the B2B side.

Implementing a company-wide newsletter covering key updates and achievements on all areas of the company will provide everybody with a great overview and they get a better understanding / „whole picture“ + it helps communicate the vision and goals for the upcoming period.

I usually use Google Forms for newsletters as this allows me to split it into various sections with the ability for the team to also leave questions or notes after every section. And the results would flow into Asana so I can monitor who read it and what feedback they shared

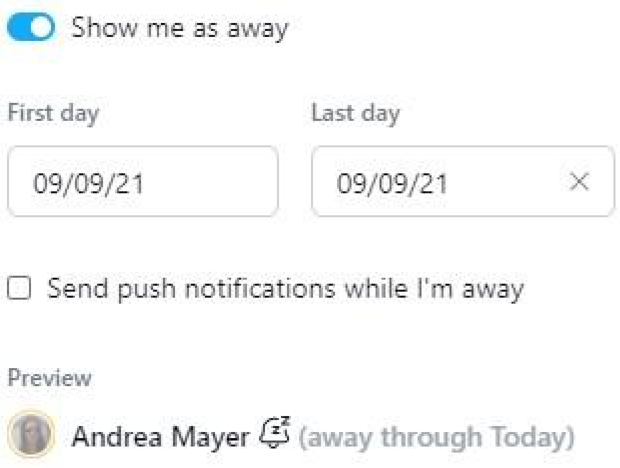
N3. Unavailability of team members



Here you can have one task or various tasks within a column listing when team members are unavailable.

In the monthly newsletter, I would also point out who is unavailable and when for the upcoming month.

Remind your team also to use the vacation indicator feature in Asana: How to control your profile settings in Asana | Product guide • Asana 3



[O] - Onboarding 🆕

Ensure that your initial onboarding process is structured and covers all aspects that you would like them to know about.

How they are onboarded is kind of the first impression about you, your company and your team. So spend some time on this and think about it carefully, and prepare nice task templates/projects for the onboarding process.

[P] - Personality 🤸

Getting to know each other

In our onboarding pack, we also ask our new team members to complete a personality test such as Free Personality Test | 16Personalities 6 to get to know them better.

Additionally, we ask them to prepare one Asana task where they share some details about them such as hobbies, fun facts and more + share some pics

It could look like this:

Description

Country:

Birthdate:

Zodiac sign:

Education or Courses completed:

Nature Lover

Hobbies:

Countries/regions I want to travel to next:

Key things you are proud about:

Strengths:

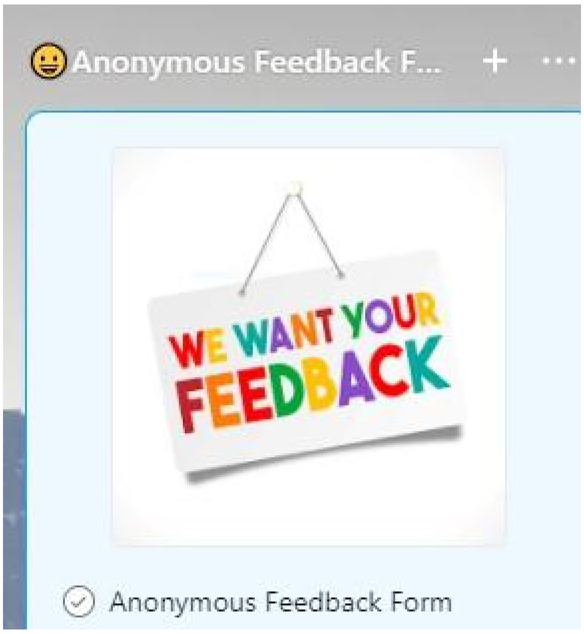
Weaknesses:

More about me in the "This or That" Questions Graphic attached below

All the tasks would be added in a separate column/section in the Asana newsletter project.

[Q] - Questions ❓

Anonymous feedback form



This form contains some important questions and empty fields so team members can share their concerns in an anonymous way. (Currently I use google forms)

Some team members would tell you straight up when something annoys them, but not everybody is like that, hence why such form works really well.

Usually, we have a ritual that we also send such a form at the end of the year + we add fields to ask for specific feedback about team members (whoever wants to take part will be listed).

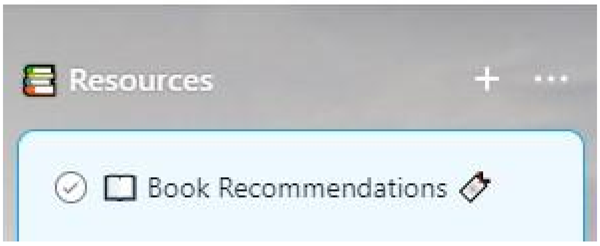
Doing this gives another push of appreciation for the upcoming year.

So far I can say by doing this a few times already the team loves it 🙂

This form would be also added to the main newsletter project in Asana.

[R] - Recommendations 📖🔖

R1) Book recommendation list



Over the years we have also collected a book reading list that contains book and article recommendations for various topics.

Whenever a team member has a recommendation they would submit it as well with the reason why they think it is worth reading it.

R2) Program recommendations

We also have a list of programs we recommend the team to use that can help them to take notes such as Evernote or Google docs and sheets or help them improve their writing skills such as Grammarly etc and many more (Note: I am not affiliated with any of these programs just mentioning here what we use)

[S] - SOPs 💻🧭

It is also important to keep in mind that team members feel more valuable when they are learning and enhancing their skills.

To inspire and motivate your team to achieve great results you should provide them with opportunities for growth and development.

In our company we have a folder with all SOPs (work guides) and whoever is interested in learning something new they can find everything they need in this folder.

We constantly update the guides.

[T] - Team Work & Transparency 👏

Promoting and encouraging teamwork boosts productivity because it makes team members feel less isolated and helps them to feel more engaged with their tasks.

Competitions can be a great motivator to strengthen teamwork but they should be set up in a friendly way meaning make sure that you're not incentivizing moral hazard and focus especially on the teams.

Lack of transparency can erode the trust and credibility that you've worked hard to maintain at your company. Newsletters are a great way to achieve transparency.

[U] - U are awesome - U did it 🏆

Celebrate wins 🏅

Can be successfully completed projects, goals achieved, etc.

This can also be done via the monthly team newsletter or in the main newsletter Asana project.

[V] - Vision ⏳

Company Vision

A key driver of motivation is when team members can see all their efforts are driving towards something.

They need to know that there's a destination in sight.

That's why it is very important to clearly communicate your company vision.

You could add this in your main Asana team/project overview.

And always communicate any key updates/achievements/changes in the regular newsletters.

[W] - Why ❔ 🧐

Always explain the WHY

In combination with setting goals, it is of the same importance to focus on the WHY so your team clearly understands the importance of why something has to be done.

Let‘s assume a website change has to be completed to test a new marketing strategy to find out which product sells better as this is crucial for stock planning.

If you just tell a team member to execute the task without info they would not understand the importance of it. So ensure they have the full picture in order for them to be in the loop.

Knowing all details about a task will also allow them to organize them in order of priority.

[X] - Xtra Delight 🤩

When you and your team are in a very stressful period show them the extra delight feature, trust me they will love it when they test it out for the first time not knowing what to expect 🙂

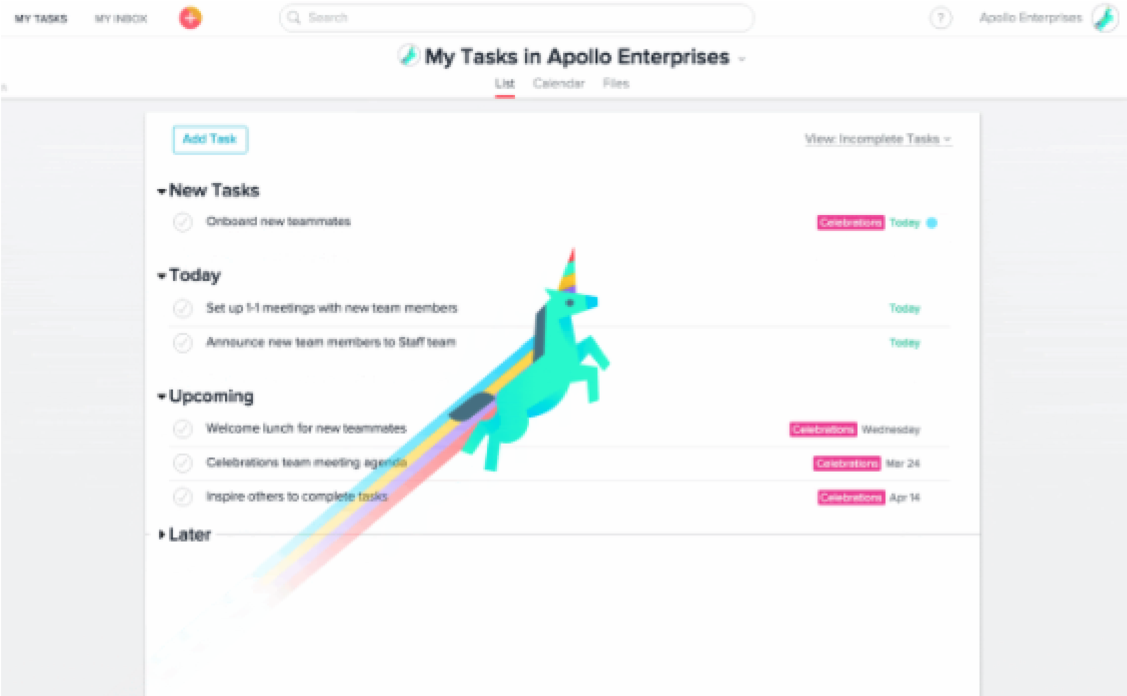
In order for Tab-B and Tab-V to work its magic, be sure you have “Extra Delight” turned on in the Hacks tab of your Profile Settings:

You can find these and more keyboard shortcuts in this list: Keyboard shortcuts in Asana | Product guide • Asana 8

[Y] - Yeti ✨

Ensure your team members have „Celebrations“ enabled Celebration Creatures • Asana 4

Once enabled, one of the four celebration creatures (a unicorn, yeti, narwhal, or phoenix) will sometimes fly across your screen like a shooting star as you complete tasks. Celebrations are randomly generated and won’t occur each time you complete a task, but the more you complete, the more they’ll visit!



Now please also ensure they know how to disable them if they want to as everybody is different and for some people in your team they might get enough over time! 😂

(Whoever wants more celebrations I recommend to upvote here: Additional and customizable Asana celebrations 4)

[Z] - Zen 🧘

Find your inner zen

Work can be really stressful at times.

I recommend providing some ideas to your team on how each and everybody can cope with stress and how they can find their inner zen.

Sports, yoga, breathing exercises, painting, power nap, calming music, etc.

You could even hire an expert to offer a meditation session once every while for whoever wants to take part.

So that's it for now 🙂 Have some more ideas but we reached the last letter in the alphabet 😃

Link to this tip's discussion thread in the Asana Forum

Collaboration

💡 Unconventional tip to improve Asana adoption

Bastien Siebman

I have an unconventional tip to improve Asana adoption within your organization! Thanks, Paul Minors for the tip.

When you just deployed Asana in your organization, you could send regular reminders by email or Slack to encourage people to check their Inbox and My Tasks views! Mastering those views, or at least checking them, is the key to better adoption.

Link to this tip's discussion thread in the Asana Forum

Collaboration

Who sees whom, a guide to guest visibility with Batman & Robin

Bastien Siebman

When working with guests, I am always confused by who sees who, because in a lot of cases a guest will see another guest as a “Private user”. So they see comments like “Hey Bryan, Private user will help you with this unless you talked with Private user already. I know he asked Private user a while back.” 😅

I wanted to understand once and for all how this worked, and invited Batman and Robin on a “Save Gotham” task. Here goes.

TLDR; guests only see each other if they are project members or team members. If you prefer a video, here are my explanations.

Note: one of the accounts was stuck with French, so “Utilisateur Privé” and “Up” stand for “Private User” and “Pu”. 🇫🇷

Link to this tip’s discussion thread in the Asana Forum

Collaboration

Hiding a Portfolio Custom Field from Portfolio Projects

Larry Berger

I just learned something new about Portfolio-level custom fields that is undocumented as far as I know (not in How to Get Started With Asana Portfolios | Product Guide or Portfolios FAQ).

My client has a requirement to track various attributes of all the projects in a certain Portfolio. Naturally, Portfolio-level custom fields are the solution. However, some of these attributes are to be kept private: **they must not be visible to anyone except members of this Portfolio (this is a private-to-members Portfolio, not public to the org), and especially not to the member Projects themselves.**

In case you weren't aware, Portfolio-level custom field values are actually "inherited" by the projects in the Portfolio (at least if they're non-empty; the empty ones are skipped over). These values appear in the project itself (not just in the row in the Portfolio table) in the "i" Info Project Details popup. But, as it turns out, that's only true for organization-wide Portfolio custom fields. Local-to-the-Portfolio (non-org-wide) custom fields are kept private to the Portfolio and are not visible in the project **for users who do not have access to the Portfolio**; just what the client wanted!

The behavior is somewhat analogous to project-level local (not org-wide) custom fields, where their values are protected from view in the Task Detail pane for those without access to the Project in which the custom fields were defined. I was happy to see that the Asana developers carried this through to the Portfolio custom fields implementation–thanks!

Link to this tip's discussion thread in the Asana Forum

Collaboration

Dealing with external clients - How much access should they have?

Andrea Mayer

How much Asana access to give to external clients?

I really don't know how often I have been in discussions regarding this topic over the past years 😅

I guess there is not really one way on how it should be done all the time, it really depends on your team and your clients.

Since this has been challenging at times I thought I'd share my experience on how we have handled this with various clients and some issues we have experienced and how we solved them.

🚦 Giving a lot of access - Pro's and Con's

For one of our companies, we created a team in Asana for every new client we onboard.

Then within that team, we have one dashboard for our coordinators (where all tasks are listed)

Then we have a separate project for the marketing team, the developer team and the design team where only the relevant tasks for these team members are added. (All the tasks in the special projects are always tagged to the coordinator project as well as they would want to have an overview of everything).

At the very start, we gave our clients comment only access to some projects, such as the marketing project, however, we soon noticed that they got way more involved than we wanted them + this way they were also able to immediately see whenever a task is delayed or communication between our team members regarding the execution of the tasks. Sometimes also our team members added tasks in the project that the client should not see. Also we are using Hubstaff for time tracking and the tracker would post an update daily on hrs worked per day and total hrs worked on this task which is another thing we don't want/need clients to see.

So considering all these factors in the end we decided it was not wise to invite the clients to these projects directly

🚦 Medium level access - Pro's and Con's

Instead, we created one project within the team restricted to the coordinators and the client where the coordinators then picked specific tasks or updates to be shown there.

Or let's say the marketing team would require details from the client, then they would create a subtask under their task and only this subtask gets added to the client project.

Then instead of the client seeing every tiny detail of the process, we provided them with regular updates on how everything is going 1-2 times per week via the Asana project status update and they did communicate via Asana Messages + 1 call per week.

🚦 Giving very limited access- Pro's and Con's

Now for another company, the projects we are working on are smaller so we did not create a team per project but instead just one Asana project per client (to which only the internal team has access to) and we would provide the clients with a weekly report (in form of Asana dashboard/Portfolio)

🚦 Full access - Pro's and Con's

Then we also have some clients with which we built a better relationship over years already. For those, we know that it would be okay to give them more access directly.

We would also allow them to add tasks directly of things they need us to work on (For the few clients we do this for it is okay since we bill the time directly (we use Hubstaff meaning the client can also see the total time tracked daily since reports are pulled directly. I wrote more about this here.

To summarize what I would say is that it really depends on the clients you perform work for as to how much access/visibility you want them to have.

Would be keen to hear your thoughts on this topic and how you are handling it?

Link to this tip's discussion thread in the Asana Forum

Section 3: Clarity

Clarity

🗑️ Stop deleting tasks permanently

Bastien Siebman

When you delete a task in Asana, there is a red banner that appears at the top. That banner contains a button that says « Delete permanently ». The problem with this kind of banner is that it does not take into account the fact that many people (including myself sometimes) just don't read the interface properly. I have seen clients click on that button without even thinking about it every time they deleted a task.

Going into the habit of permanently deleting something is dangerous. Because you never know if you won't be needing that task one day. Deleting is usually enough unless you have confidential things you want to hide. Otherwise, just delete the task.

On the topic of deleting tasks, I rarely do. If I don't need to do something anymore, I usually write a comment explaining why and the context, and I complete the task anyway. That way it is easier to find it again, just in case…

🇫🇷 Version française

Link to this tip's discussion thread in the Asana Forum

Clarity

📘 The tale of Jerod the unwise in the subtask maze

Bastien Siebman

Once upon a time, there was a young farmer with the name Jerod Hillard. He was known as Jerod the unwise. Thirsty for adventure, he decided to go against all odds and to enter the subtask maze. Everyone advised against it, arguing he was not wise enough to navigate such a maze without proper training.

He entered the maze, and as he was going deeper and deeper into the levels, he lost his way.

After years of errors, he was finally able to find the exit of the subtask maze. Below is what he learned. He is now known as Jerod the wise.

Limitations

- subtasks are not part of their parent task project

- subtasks do not appear on Calendar and Timeline
- subtasks don’t count in the Project dashboard
- subtasks do not count in Workload
- subtasks are not available in Rules
- subtasks will soon be available in Flowsana
- you can’t create subtasks by email

Visibility

- by default, subtasks are not expanded in the list view
- as a result, you don’t see overdue subtasks from the main list
- you can’t expand and save as a default layout
- if custom fields are used in the project, the subtasks will inherit them but values will be hidden by default in the task pane
- in My Tasks, the project of the parent task is not shown
- inside a task pane, subtasks do not disappear when completed
- inside a task pane, in case of too many subtasks, they are hidden behind a « show more » button
- subtasks show up in the Team calendar view

Search

- advanced search can be used to search for subtask only, or filter out subtasks from the search

Guests

- a guest added as a collaborator on a subtask will not see the parent task

Accessibility

- subtasks are accessible from the list view when a task is expanded and can be opened like a regular task
- when displayed in a task pane, subtasks can be opened by clicking on the small bubble on the right
- only the first level of subtasks is visible in the list view. Deeper levels are only accessible from each subtask

Relationship with parent

- completing a task does not complete the subtasks

- completing all the subtasks does not complete the task
- the task due date is unrelated to the subtasks due dates

Possibilities

- a subtask can be multi-homed into its parent task project (and then count in Workload, show on Calendar and Timeline)
- the tool Subtasks cleaner can complete subtasks from completed tasks automatically

School of thought

- some organizations completely forbid subtasks
- some organizations forbid more than 1 level of subtasks

Kudos to Todd Cavanaugh for writing the first big piece about subtasks.

Link to this tip's discussion thread in the Asana Forum

Clarity

Use Due Dates Differently in Public and Private

Larry Berger

What do your Due dates mean? I bet at times yours have very different actual meanings. That's ok, but only if you are sticking to a workable policy, such as the example below.

In private (in My Tasks with private tasks or in my private projects) I often set Due dates for use with Rules (formerly auto task promotion) so I make sure I get reminders and nothing falls through the cracks. The Due date represents the day I'd like to be reminded, perhaps to follow up on the task or to begin working on it (which is not the same as when it's Due necessarily, should it take a week to complete, for example).

In public (in shared projects), I never value Due dates in that manner because it would be confusing to others. That's because Due date–from a team perspective–represents a meaningful deadline (requested or imposed) when something should be done, not a somewhat arbitrary reflection of a person's start date for their workflow. Clearly, it would be confusing to see some tasks with Due dates representing bona fide "to be done on" dates and others representing "so and so wants to remember to do something on" dates.

In public, don't set a Due date if the task doesn't have one yet. Or if you feel you must, adopt a way to clearly indicate the anomaly, e. g., use a tag or custom field like "Estimated," for example.

For your own reminders to public tasks, consider "Create follow-up task" Shift+Tab+F to create a private follow-up task and using an appropriate My Tasks section for when to do/follow-up work (instead of trying to use the Due date for that purpose), or perhaps use a Start date (if on a paid plan), though that doesn't help when using the Rule trigger for when a date is approaching.

Facilitate your own workflow with Due dates, but not at the expense of others when in collaboration.

Link to this tip's discussion thread in the Asana Forum

Clarity

🔎 Save the Timeline zoom value

Bastien Siebman

A client of mine wished he could save the Timeline settings (the zoom on quarterly) but still wanted to keep the list layout as the default view. I thought it was not possible... until I tried the following!

💡 Go to the Timeline view, choose a Quarterly zoom. Save the layout as default. Go to the List view and save the layout as default. *Voilà* you get the list as the default but when switching to the Timeline, the Quarterly zoom is selected!

Pretty cool isn't it?

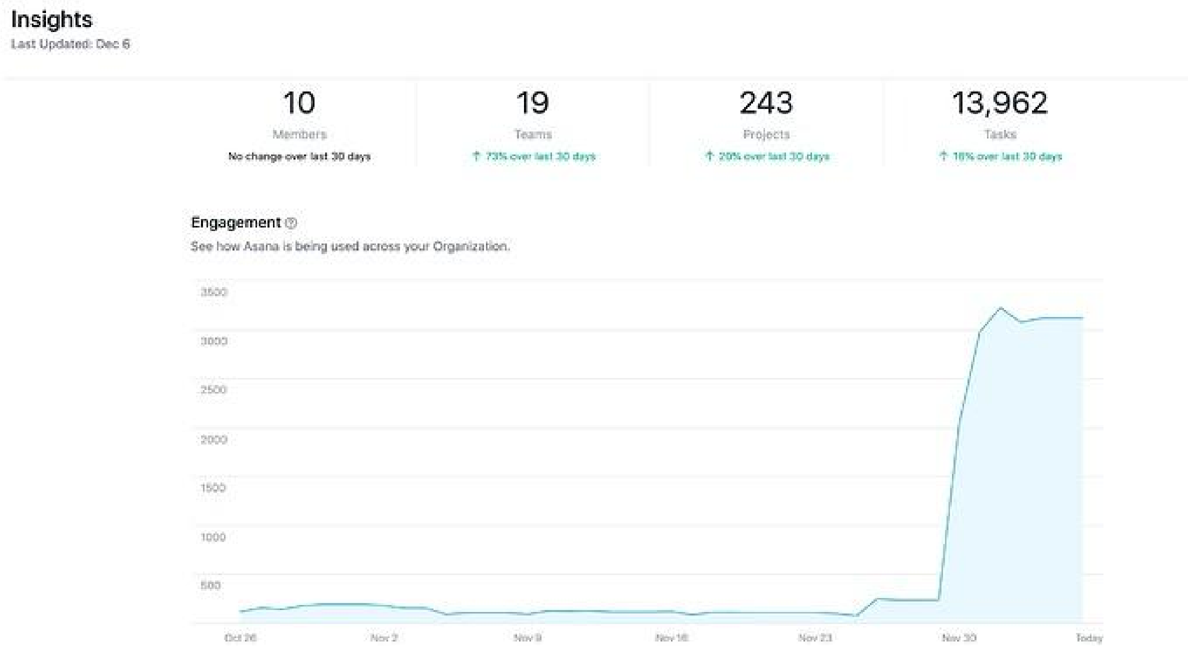
[Link to this tip's discussion thread in the Asana Forum]()

Clarity

“The boss said” versus, “An Asana expert said”

Bastien Siebman

Guess when that client started working with me to help out with their Asana?



They already knew how to use Asana, you can see a small engagement. But they were not confident enough to introduce it to the whole organization, and our sessions helped them discover new ways of using the solution. Their first big workflow migrated onto Asana is the meetings. Having attendees collaborate on the agenda in advance, and screen-sharing the Asana task during the meeting is a real game changer!

Also, don’t underestimate the importance of having someone from the outside. « The boss said » versus, « An Asana expert said » is really not the same thing when it comes to team members.

[Link to this tip’s discussion thread in the Asana Forum]

Clarity

🤔 Should I insist on all requests being a #asana task?

Bastien Siebman

I was asked the following question during a recent session with a client: « As an employee using Asana, when I receive a request from another employee, should I insist on it being a task, even though the request will end up generating several tasks or even a project? ».

An example would be « Bob can you organize the Christmas party? » said in Slack, which can't decently be a task, but rather a complex project with many involved parties (pun intended).

My advice was that "over-the-counter" requests, water-cooler suggestions, and half-baked email demands should always be a task. Even if that task ends up being turned into other tasks and projects.

The good practice, in that case, is to create the resulting work and inform the requesting person, by using comments with mentions to the new tasks and projects. And complete the original request, as a result, leaving the requesting person the freedom of following the new tasks or projects if they decide to.

[Link to this tip's discussion thread in the Asana Forum]

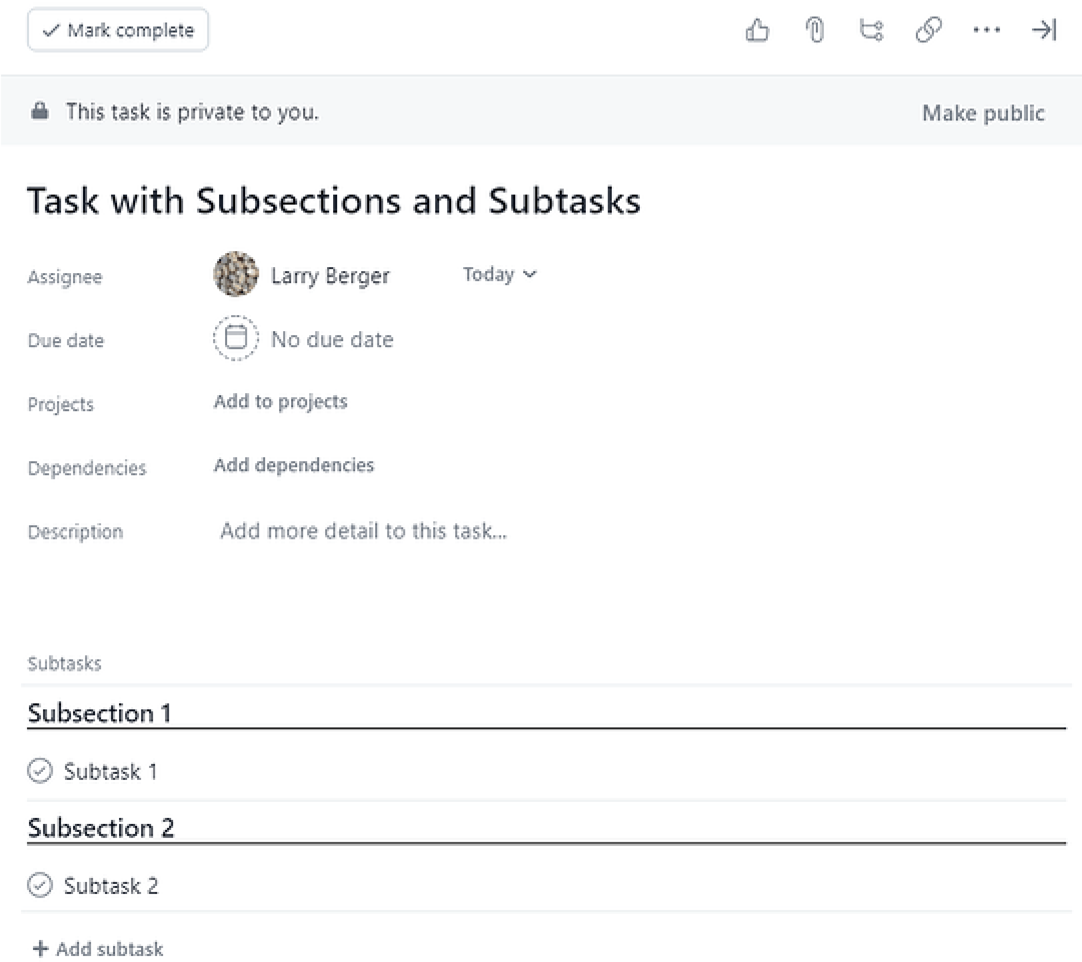
Clarity

Subtask Sections (aka Subsections) - The Hidden Story

Larry Berger

This incredibly useful feature is completely hidden in the Asana user interface and I don't think it's documented either, but it's been there forever and is good to remember.

It looks like this:



The trick to adding a Subsection is to:

1. Open the Task Detail pane for the task in which you want to add the Subsection,

2. Click to focus your mouse cursor somewhere (any field) within the Task Detail pane (otherwise you'll get a Section in the Tasks List instead of a Subsection here).
3. Use the shortcut Tab+N (the same shortcut that creates a Section when in the Tasks List) to create the Subsection.

Link to this tip's discussion thread in the Asana Forum

Clarity

Medium and Low priorities are usually an illusion

Bastien Siebman

Bear with me. The default priority custom field in Asana contains High-Medium-Low.

Apart from the fact that they should not have colored them all (but only color High), I believe having Medium and Low priorities adds complexity where things used to be simple.

Something is usually either urgent or is not. It is a high priority or a normal one. And, for the sake of clarity, when something has a default value, use an empty value! Your Asana project will be clearer, with fewer words and colors, and the actual high priorities will pop on the screen.

My revised version of the priority field? A single value « High » is in red. Nothing else.

[Link to this tip's discussion thread in the Asana Forum]

Clarity

✂️ The “eff” effect

Bastien Siebman

I like to give cool names to my methods, just in case they stick and I become famous one day.

Today, let’s talk about the « eff » effect. Let’s say you are on your 34-inch widescreen and do some Asana. You create a « Herocorp 2021 Marketing Priority plan », a « Herocorp 2021 Marketing Initiatives » and « Herocorp 2021 Marketing Team meetings ». Everything looks crisp.

Then your colleague, on its 13-inch Macbook, opens their Asana. They now see 3 new projects: « Herocorp 2021 Marketin… », « Herocorp 2021 Marketin… » and « Herocorp 2021 Marketin… ». They just experienced the « eff » effect 😬

Like any other software, Asana can run on any screen size. But it has to make a compromise on what could be displayed on the screen. And very often, content is cut (it is called a text ellipsis in web development).

You don’t decide where the ellipsis goes, so the rule is simple: place the most important words first. The company name is usually useless, the year can go at the end, the words could be replaced by acronyms (Marketing becomes MKG), etc.

That rule applies to project name, custom field values, custom field names, task names…

[Link to this tip’s discussion thread in the Asana Forum]()

Clarity

Visual sections: why and when using a custom field is better than a section

Bastien Siebman

If you want to have visual sections in an **#asana** project, there are two ways: use real Sections or use a custom field and sort by that custom field.

Note: for that last trick to work properly, you need to un-toggle “Sort within sections” in the Sort menu.

I have a preference for the second solution, but because I had no tangible reason, I decided to study the difference.

Why use sections (solution #1):

1. sections become columns in board view, not custom fields
2. sections display lanes in Timeline view
3. people get confused with solution #2 because they can’t create a new section easily
4. you can still sort by another field
5. it works with the Free plan

Why use a custom field (solution #2):

1. you can share custom fields between projects
2. you can search for custom fields more easily than sections
3. if a task has several statuses/stages with custom fields, having another status with the section is weird
4. if you have too many tasks within a section, the section itself might be outside the screen and you can’t see it when a custom field could always be visible in a column
5. you can still have the 2nd level of section if you use a custom field for the 1st level
6. if there are not tasks with that value, the “section” does not show

🇫🇷 Version française

Link to this tip’s discussion thread in the Asana Forum

Clarity

🦸 Situational Awareness can be a Superpower in Asana (Know how a project is sorted/filtered first!)

Bastien Siebman

This quick tip is inspired by the 20/20 vision of Emily Roman demonstrated in this post: I have a user that is missing the "Add Task" button in My Tasks - #4 by Emily_Roman - see notices that the "Add Task" button isn't present when filtered by completed tasks... **WHO KNEW?!?**

Many users prefer to take advantage of the ability to Save as default View yet because this changes the view for EVERYONE it may sometimes lead people to believe information is missing or a bug is present. **Take a moment to assess how a project is currently laid out so you can always find what you are looking for.**

You don't think demonstrating situational awareness can be a superpower? Jason Bourne might think differently. 😉

Link to this tip's discussion thread in the Asana Forum

Clarity

🧭 The Asana admin compass

Bastien Siebman

When I am helping clients, I always emphasize the importance of having an Asana admin. The admin is the person that knows the tool very well, can answer questions, trains the team, and makes sure the org stays clean and organized!

(the French translation is available 🧭 Le compas de l'administrateur Asana)

I thought it would be interesting to have an "Asana admin compass" as a list of tasks to undergo regularly as an admin. FYI I am promoting my own tools because I created them for exactly that purpose: to help users go further with Asana.

Mission 1: keep the org clean and nice

- review the list of tags, remove duplicates, challenge colors (using Tags explorer)
- review custom fields, challenge color and text, make sure the drop-down is alpha sorted, remove duplicates (using Custom Fields Explorer)
- encourage everyone to have an avatar, a full name, and role
- clean subtasks by completing the ones in completed tasks (using Subtasks Cleaner)
- suggest emojis, we never have enough of emojis (some inspiration in The best emojis for business and work in general)
- make sure templates are all in a public team (if applicable)

Mission 2: prevent overwhelming feelings in the team

- review everyone's My Tasks views and encourage cleaning
- review overdue tasks using a report
- encourage Inbox use
- challenge projects & templates existence and encourage owners to archive
- audit collaborators on tasks in templates

Mission 3: watch out for data leak

- audit guest access (using Guest Inspector)
- remove "outdated" guests from the org (using the admin console)
- audit teams and projects privacy settings (public, private, on request) and membership list
- audit task collaborators (if applicable, on some sensitive tasks)

Mission 4: keep the cost under control

- export usage (using the admin console) and remove inactive users to free up seats and downgrade

Mission 5: be the helper they need

- provide a place for Q&A (in the form of a project and/or a form)
- keep a record and share previous questions and answers
- use the Organization export to identify new users (without proper training)
- use the Organization export to detect a decrease in usage (in department, location...) and investigate

Mission 6: automate as much as possible

- keep an eye out for new rules and get inspiration from [The coolest Asana rules] 😎

Mission 7: define and watch for best practices

For example:

- authorized level of subtasks deepness (hint: should be 1 😄)
- project name structure
- a color system and workflows around colors (using 🎨 [If Van Gogh used Asana: a study about colors on Asana] for example)

Mission 8: design the Asana systems

Using [A framework to evaluate Asana systems]

- find the right balance between teams, projects, tasks, and subtasks
- use custom fields or tags when appropriate
- design workflows adapted to each need

Thanks, Larry Berger, Jerod Hillard, and Julien Renaud for your help. The detailed list now includes more than 50 points of control (reach out to Bastien to get it).

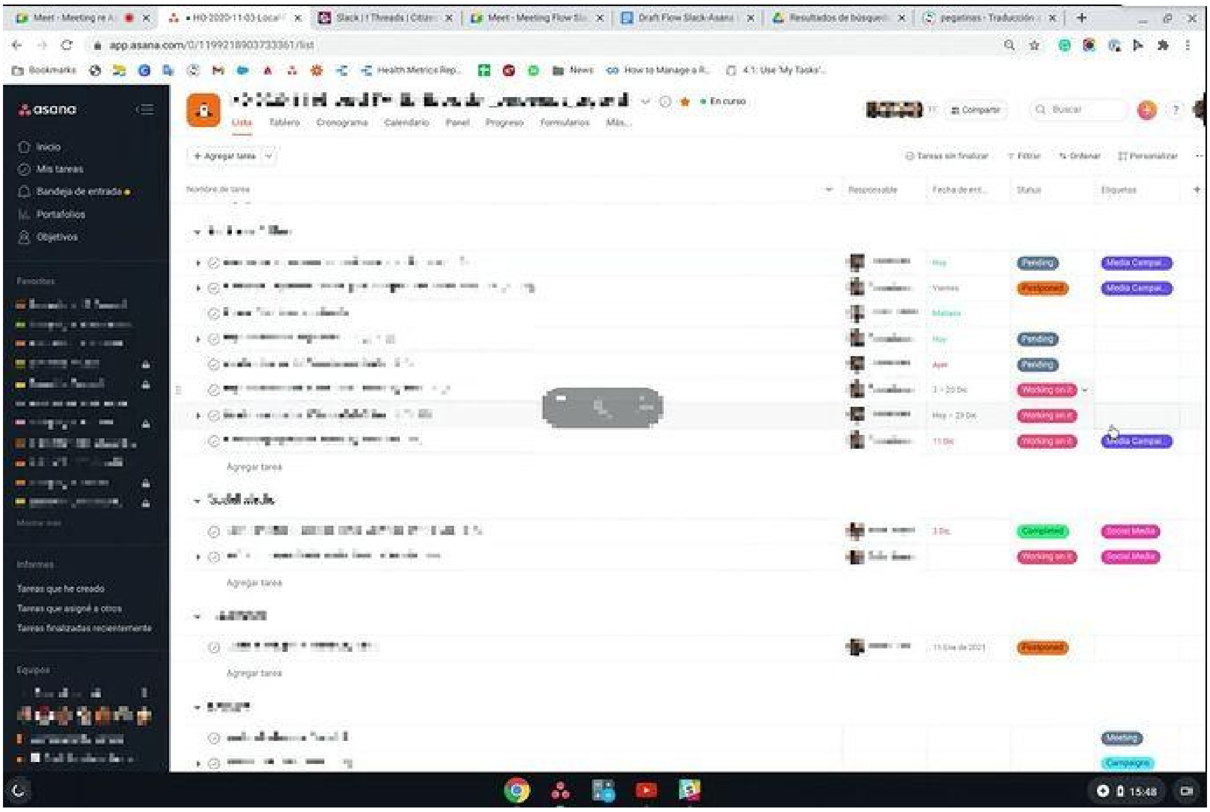
[Link to this tip's discussion thread in the Asana Forum]

Clarity

🎨 Too many colors and colors don’t make sense anymore

Bastien Siebman

The image below comes from a real client account. When you look at the image, what jumps at you directly?



In my case, that’s the custom field “Working on it”, and then the tag “Social Media”. And at last, you finally see the 3 outdated tasks. It shouldn’t! Very often, tags and custom fields should not use colors, at all. Unless they really mean something (a high priority for example). Too many colors and colors don’t make sense anymore…

PS: I asked for the client agreement and used https://www.facepixelizer.com/ to anonymize the image if you were wondering.

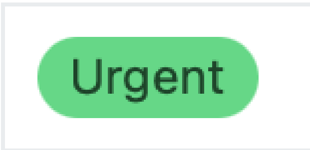
[Link to this tip’s discussion thread in the Asana Forum]()

Clarity

🤯 The most confusing custom field I have ever seen

Bastien Siebman

When I tell my clients that colors are important and they convey meaning, I am not joking. Just looking at the custom field makes me cringe.



My biggest advice to every Asana user is:

- stop using colors everywhere
- use them accordingly
- red is bad, green is good, no exception
- when you look at your project, what should strike you are High priorities and overdue tasks. Nothing else.

PS: that is a real custom field I saw yesterday during a session with a client 🙂 we had a good laugh about it 🤣

[Link to this tip's discussion thread in the Asana Forum]

Clarity

💡 How to group projects together?

Bastien Siebman

We are all used to file systems where you can create folders hierarchy, and sometimes in Asana, we want to do the same to organize projects.

Here are 4 ways to group projects together in Asana!

1️⃣ Teams: don't hesitate to create a team with the only purpose of grouping projects together!

2️⃣ Fake project as a separator: a project named « ———« can act as a perfect separator in the sidenav!

3️⃣ Portfolios: they are a way to group projects in various ways, and could be your entry point to finding any project.

4️⃣ Colors: project color as a grouping key, like red for high priority projects, or green for HR projects, etc

5️⃣ Acronyms: if you define acronyms for clients, initiatives, departments... using that acronym in the project name will make it easier to find them by using the search. It kinda works as a way to group projects together, doesn't it?

Andrew Parkes also suggested 6️⃣ and 7️⃣: use emojis or naming conventions (which is a variation of the 5️⃣). Thanks!

[Link to this tip's discussion thread in the Asana Forum]()

Clarity

🚶‍♂️ The power of emojis

Bastien Siebman

If you know me, you know I love emojis. They aren’t just for teenage girls on Whatsapp. They make Asana fun to use and can help you read your tasks more easily.

A couple of examples:

1. My daily walk task is called “ 🚶‍♂️ Daily walk”, not “Daily walk”. Just seeing that small emoji makes me want to do it!
2. I have tasks starting with 🎁 regarding Christmas presents so I don’t forget, they stand out in my list.
3. I use 🔥 to emphasize a task I really need to do.
4. or ❤️ to emphasize a task I really want to do!

Don’t underestimate the power of emojis! And their colors! Hearts for example come in various colors 💙💚💛💜🖤🤍🧡 use that to your advantage.

[Link to this tip’s discussion thread in the Asana Forum]

Clarity

🤔 Assigning duplicates of a task when a task depends on it

Bastien Siebman

Here is my weird question of the day!

Let’s say you have task A and task B, task B being dependent on task A. Still, following? Ok. Now, what happens if you assign copies of task B (with the assign copies feature)?

Well, the dependency **is not applied to the copies**. Copies of B are not dependent on A.

Did you know? Of course not, nobody is wondering about this kind of thing! 😬

[Link to this tip’s discussion thread in the Asana Forum]

Clarity

Instead of SMART Criteria for Goals and Objectives, Consider SMARTIE adding "Inclusive" and "Equitable"

Larry Berger

SMART criteria (Wikipedia) help to specify your goals. The mnemonic is defined with differing terms by some, but the most common ones are:

- Specific (or Strategic)
- Measurable (or Motivating)
- Achievable (or Attainable)
- Relevant (or Realistic)
- Time-bound (or Time-limited)

There are various extensions or replacements of the mnemonic as well (see link above).

But a new one to me that I will try to use next time originates from The Management Center (they help leaders working for social change) and is found at SMARTIE Goals Worksheet. They define them as follows; note in particular the addition of the last two criteria:

- **Strategic**
  Reflects an important dimension of what your organization seeks to accomplish (programmatic or capacity-building priorities).
- **Measurable**
  Includes standards by which reasonable people can agree on whether the goal has been met (by numbers or defined qualities).
- **Ambitious**
  Challenging enough that achievement would mean significant progress—a “stretch” for the organization.
- **Realistic**
  Not so challenging as to indicate lack of thought about resources, capacity, or execution; possible to track and worth the time and energy to do so.
- **TIme-Bound**
  Includes a clear deadline.
- **Inclusive**
  Brings traditionally marginalized people—particularly those most impacted—into processes, activities, and decision/policy-making in a way that shares power.
- **Equitable**
  Seeks to address systemic injustice, inequity, or oppression.

Googling “smartie goals” will uncover articles and examples that may help in getting more familiar with these.

Link to this tip’s discussion thread in the Asana Forum

Clarity

How to build your strategy in Asana (Bottom-up or Top-down)

Rashad Issa

Whether you are an SME (small-medium enterprise) or a large organization, whether you are co-located 📍 , or spread around the globe 🌍, if you use asana, it is probably because you want to enhance productivity 📈 and increase collaboration. 👱 👨‍🦲

Most importantly, it is because you are trying to achieve something that is part of a bigger picture.

❓ So the question is: what is this bigger picture?

Asana has introduced Goals a while back and talked about the Pyramid of Clarity.
[Your Guide to Creating a Pyramid of Clarity with Goals in Asana - The Asana Blog]

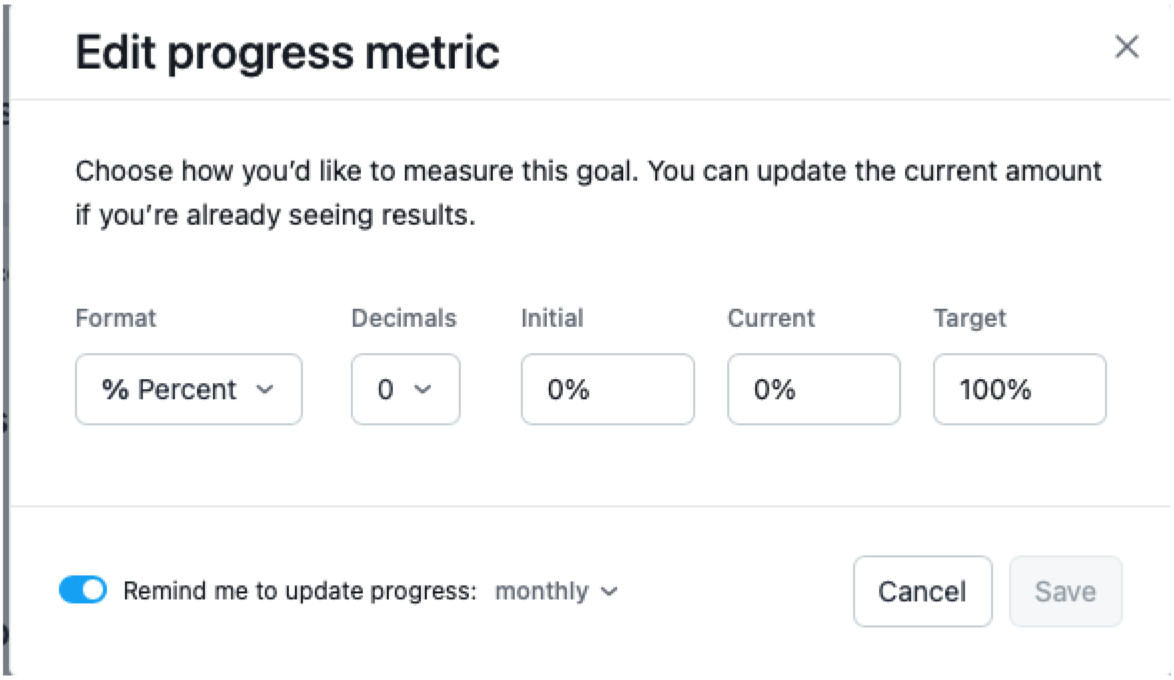
Let us put this into practice. Whether you are brand new to asana and Goals is a feature you access from day 1, or whether you have used asana for a while and recently upgraded to enjoy this feature. Here are few things to consider that will make this feature work:

⬇️**Top Down Strategy:**⬇️

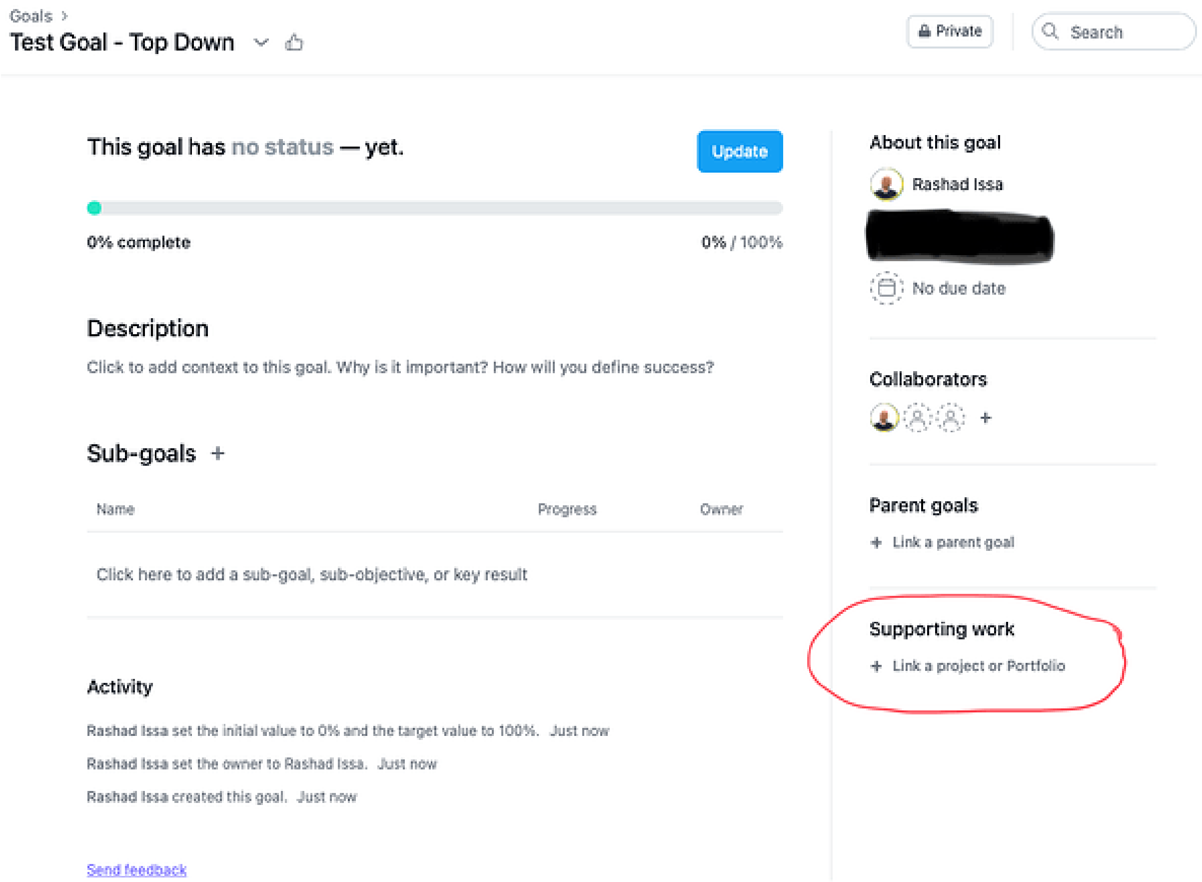
1. This usually happens when the exec team set clear high-level strategic goals that the company needs to achieve
2. Take note of these initiatives, and enter them one by one within Goals
3. Work with all the executive team to ensure each goal is defined and has a measurable metric
4. Set the acceptable time frame, frequency of updates, and any high-level priority metric you want to bring forward to the page

I attached a couple of pictures to show you what a goal would look like. My metric is set for percentage and an update is expected on a monthly basis.

Why is this a top-down approach? Because the goals are built first and then you can decide how to cascade this down to the teams, and give them the ability to link their work (i.e. the different projects and portfolios) to be linked to this goal. You can see the supporting work is left blank until you engage with your team and map out the work.



Edit progress metric
Choose how you'd like to measure this goal. You can update the current amount if you're already seeing results.
Format
% Percent
Decimals
0
Initial
0%
Current
0%
Target
100%
Remind me to update progress: monthly
Cancel
Save



Goals
Test Goal - Top Down
Private
Search
This goal has no status — yet.
Update
0% complete
0% / 100%
Description
Click to add context to this goal. Why is it important? How will you define success?
Sub-goals +
Name
Progress
Owner
Click here to add a sub-goal, sub-objective, or key result
Activity
Rashad Issa set the initial value to 0% and the target value to 100%. Just now
Rashad Issa set the owner to Rashad Issa. Just now
Rashad Issa created this goal. Just now
Send feedback
About this goal
Rashad Issa
[redacted]
No due date
Collaborators
Parent goals
Link a parent goal
Supporting work
Link a project or Portfolio

⬆️***Bottom up Approach:***⬆️

1. You got the high-level direction from the executive team (or yourself … you mapped out your high-level direction for the year)
2. Generally speaking, this direction does not all kick off from scratch. You will find that there is a percentage of the direction that is dictated by some of the work you are already doing. This work is represented in some of the projects that are active in Asana
3. Note down a list of all the active projects you are working on
4. Note down all the initiatives that you will start working on based on the high-level direction you are aiming at

For your strategy to stick, make sure it is simple and easy to follow. I find that categorizing your strategy into areas will help you simplify things.

Find common themes in each of the areas and come up with a headline to explain them.

Now that it is ready, make that headline your Goal on asana, link all active projects to this goal, and work with everyone to set expectations, frequency of updates, ownership, metrics, etc…

And because you are still reading, here is a practical tip that always works for me and is very much an asana tip:

🌟🌟Create a project in Asana and make it your strategy project… Use it as your notepad to finalize all the discussion and do all the categorizing, brainstorming, and planning. Once the picture is clear for you, go on and build these goals within the Asana Goals feature. This is useful because it is very rare that your strategy is readily outlined from one go. So it saves you from changing the goals set up and only building them up when you are all set to go.

This also helps me because sometimes certain goals may not have direct active projects associated with them, but you still need to put them at the center of your strategy. Having that clarity will help you map these ones out too.

It is difficult to demo the bottom-up approach in screenshots, but I am happy to provide guidance or have a chat if you have any questions.

[Link to this tip’s discussion thread in the Asana Forum]()

Section 4: Reporting & Search

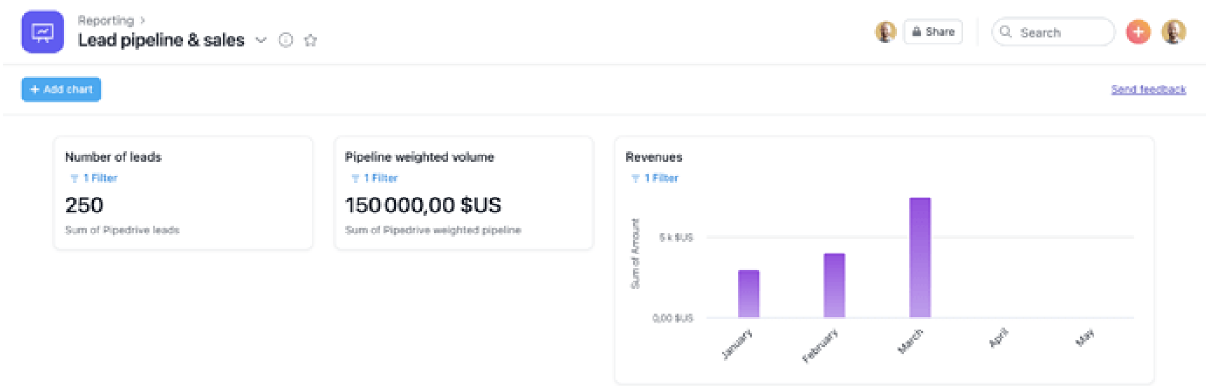
Reporting & Search

💡 Universal Reporting: how to mix Asana data and external data

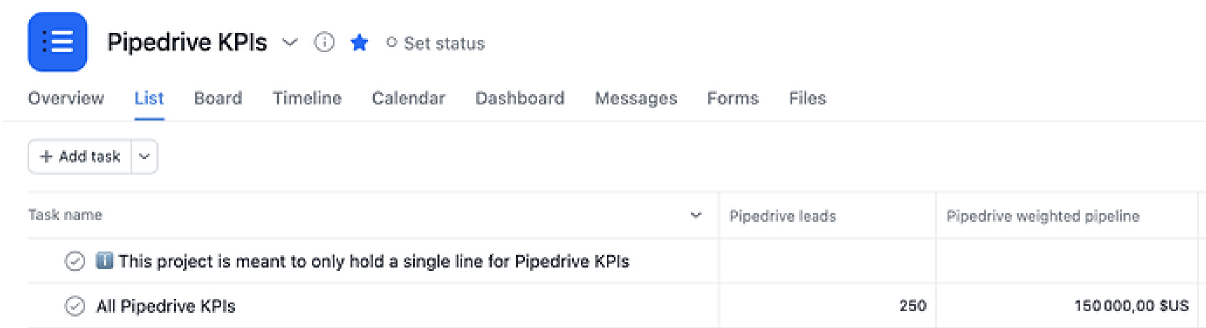
Bastien Siebman

With the newest Universal Reporting, the need to include external data quickly came into the picture for me. But at the moment, dashboards only show data from actual projects. So I found a workaround 🙂

The goal of this example is to have a dashboard with sales (from Asana data) as well as Pipedrive lead number and weighted volume. Here's the final result:

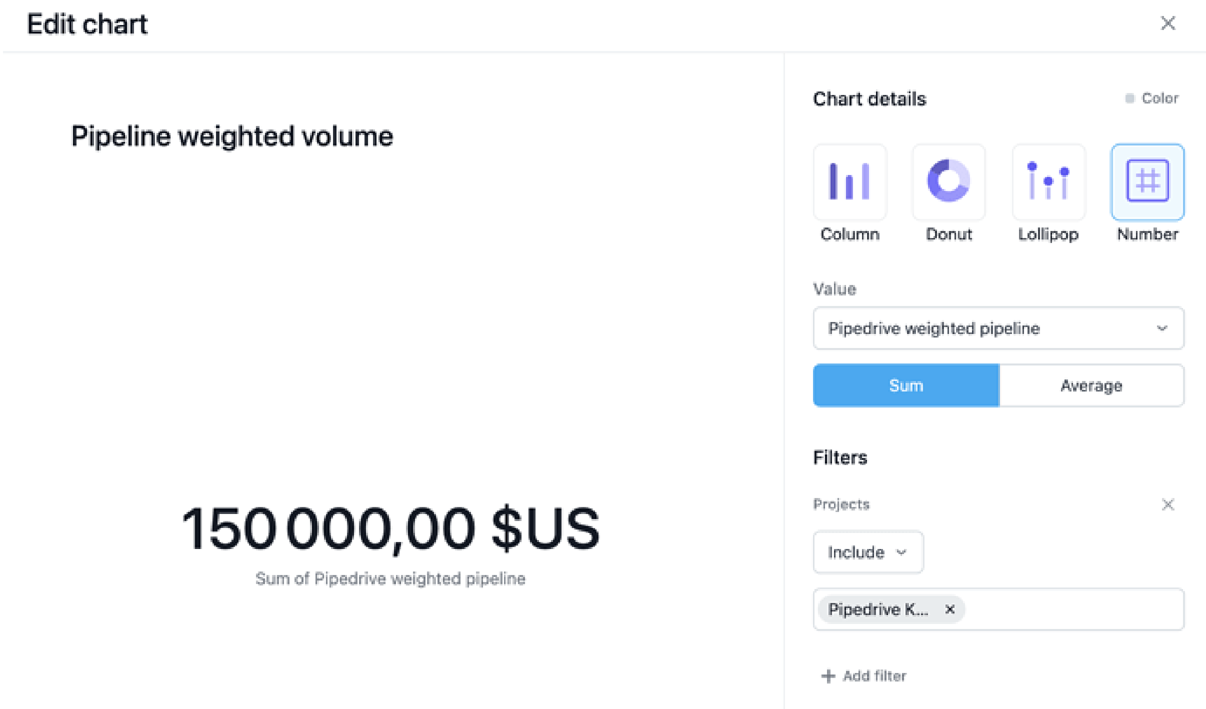


The third graph is just a bar chart made from a Revenue project that contains invoices. The trick lies within the two other charts: their source is a stand-alone project, created only to hold external data:



That might seem a little weird, but it works! This special project could be manually updated by someone regularly, or you can have some automation filling in those values 🙂 that's what I'll do myself 😬

Then the chart settings look like this:



Anyone find this useful? Let me know!

Bonus point from Jerod Hillard: the “Pipedrive KPIs” project could be a shared project with various KPIs, and a dropdown with dashboards to filter on KPIs to use.

🇫🇷 [Version française]

[Link to this tip’s discussion thread in the Asana Forum]

Reporting & Search

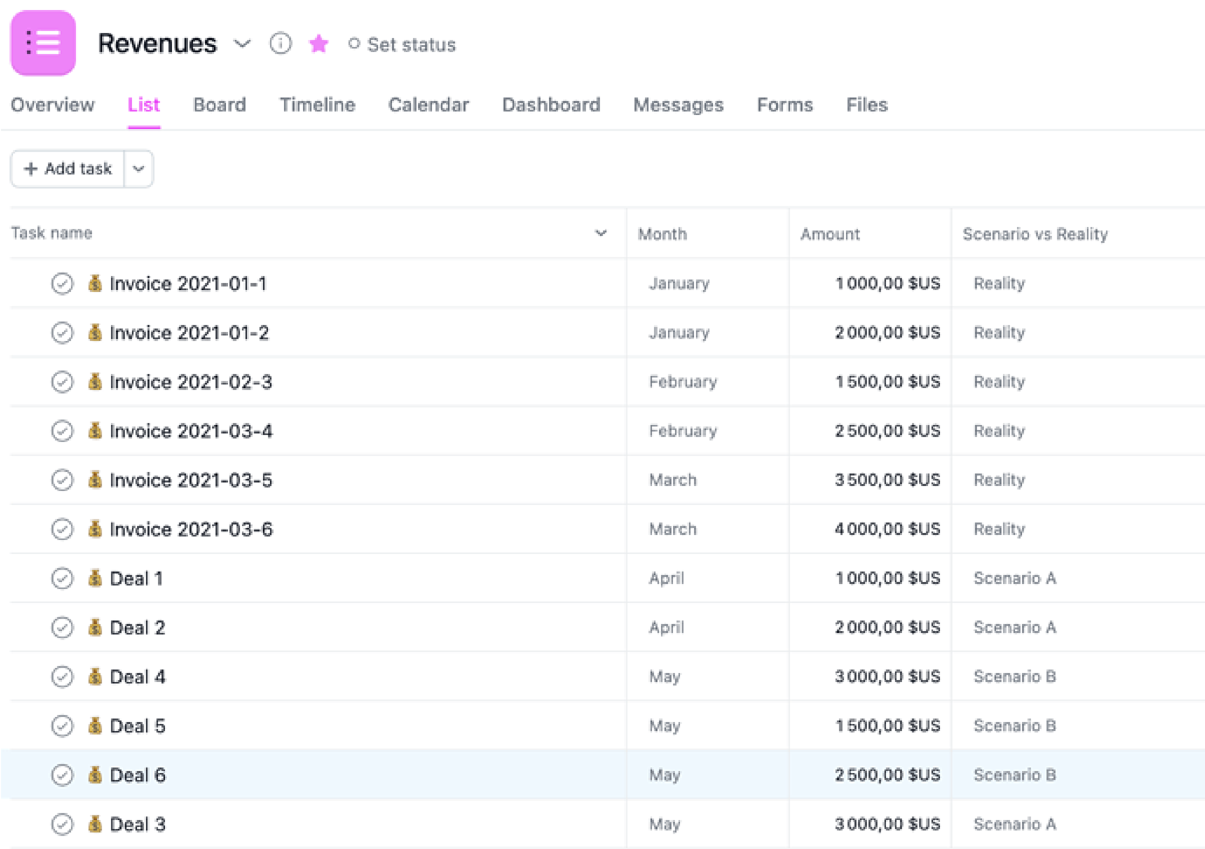
Scenario-based forecast reporting with the new Universal Reporting

Bastien Siebman

The latest Universal Reporting feature is exciting! After building my dashboards, I realized we now can do what I call “Scenario-based forecast reporting” where you can attach a scenario to your data and compare charts for each scenario!

Let me explain with an example. Let's say we want to track revenues per month, and compare 2 scenarios: scenario A we close deals 1-2-3 in April & May, scenario B we close deals 4-5-6 all in May.

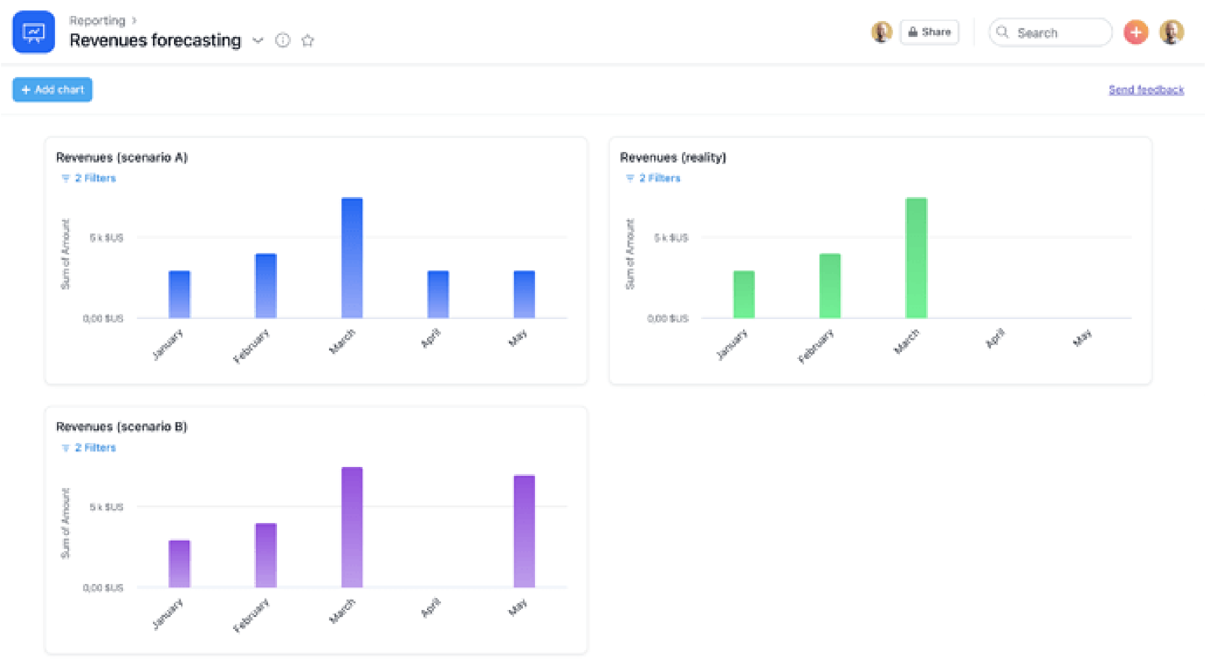
Here is what the source project looks like:



Task name	Month	Amount	Scenario vs Reality
Invoice 2021-01-1	January	1 000,00 $US	Reality
Invoice 2021-01-2	January	2 000,00 $US	Reality
Invoice 2021-02-3	February	1 500,00 $US	Reality
Invoice 2021-03-4	February	2 500,00 $US	Reality
Invoice 2021-03-5	March	3 500,00 $US	Reality
Invoice 2021-03-6	March	4 000,00 $US	Reality
Deal 1	April	1 000,00 $US	Scenario A
Deal 2	April	2 000,00 $US	Scenario A
Deal 4	May	3 000,00 $US	Scenario B
Deal 5	May	1 500,00 $US	Scenario B
Deal 6	May	2 500,00 $US	Scenario B
Deal 3	May	3 000,00 $US	Scenario A

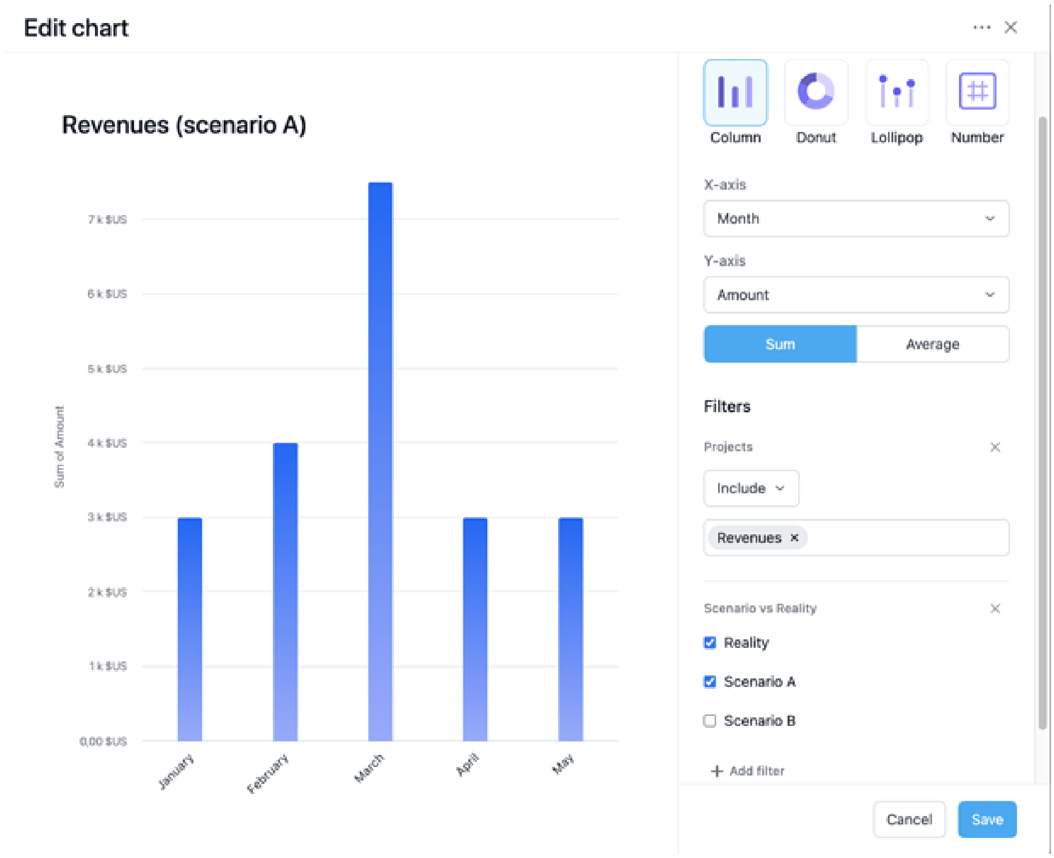
The first column contains the task names: either the real invoice number or the name of the deal for future deals. The second column contains the month, useful to build a bar chart. Then the amount in dollars. And finally, a dropdown giving context to the task, whether this was a revenue matching reality or a revenue attached to one of the scenarios.

And this is what my Universal Reporting Dashboard looks like:



On the left, we have, on top of each other, the monthly revenues for scenario A and scenario B. On the right, this is the reference, with only the "real" revenues.

The settings of the scenario A graph are the following:



This is a bar chart graph, with the month on the x-axis and the amount on the y-axis, filtered on the Revenues project, with only tasks from “Reality” and “Scenario A”. The second and third charts are the same, the only difference being in filtering “Scenario vs Reality”.

🇫🇷 Version française

Link to this tip’s discussion thread in the Asana Forum

Reporting & Search

✍️ Let Asana be your Accountability Partner for new habits!

Jerod Hillard

This is a "slow" follow-up pro tip to the excellent reminder by Bastien Siebman: 💡 Use Asana as a habit tracker

With this tip, I'd like to expand the scope of using Asana as a habit tracker by leveraging features like Brief, Overview, Milestones, Board, Dashboard, Rules, and Inbox Notifications.

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Brief - Use this space to explain the purpose of your habits as they relate to a yearly theme or resolution

- Describe why the habit is necessary or important
- Outline some objectives that you want to focus on. In my case, I listed areas of my life (4Cs) that I wanted to take action on - Craft, Community, Constitution, and Contemplation (credit: Cal Newport)
- Within these areas, I noted 3 key focal points. For example, Community consists of Marriage, Father & Friendship. Within each, I established a behavioral change I wanted to see and noted a physical change that would provoke this shift! e.g. put my phone away for the night after 6 pm - thus removing distractions so my attention was on my family.
- Define your Productivity System that will help establish the routines necessary to develop new habits. In my case, I had events like Morning Startup Routine, Evening Shutdown Ritual, Weekly Reset, Monthly Outlook, and Quarterly Alignment.
- All of the above fed into Ideal Outcomes (established as Milestones) for this theme - targeting who I wanted to be on the other side.

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Overview - Allow for the Ideal Outcomes to be shown as Milestones with their respective due dates and status shown

- Sample Outcome - *Exemplify excellence in every area of my professional life, never sacrificing integrity, always rooted in humility, and allowing success to serve others*

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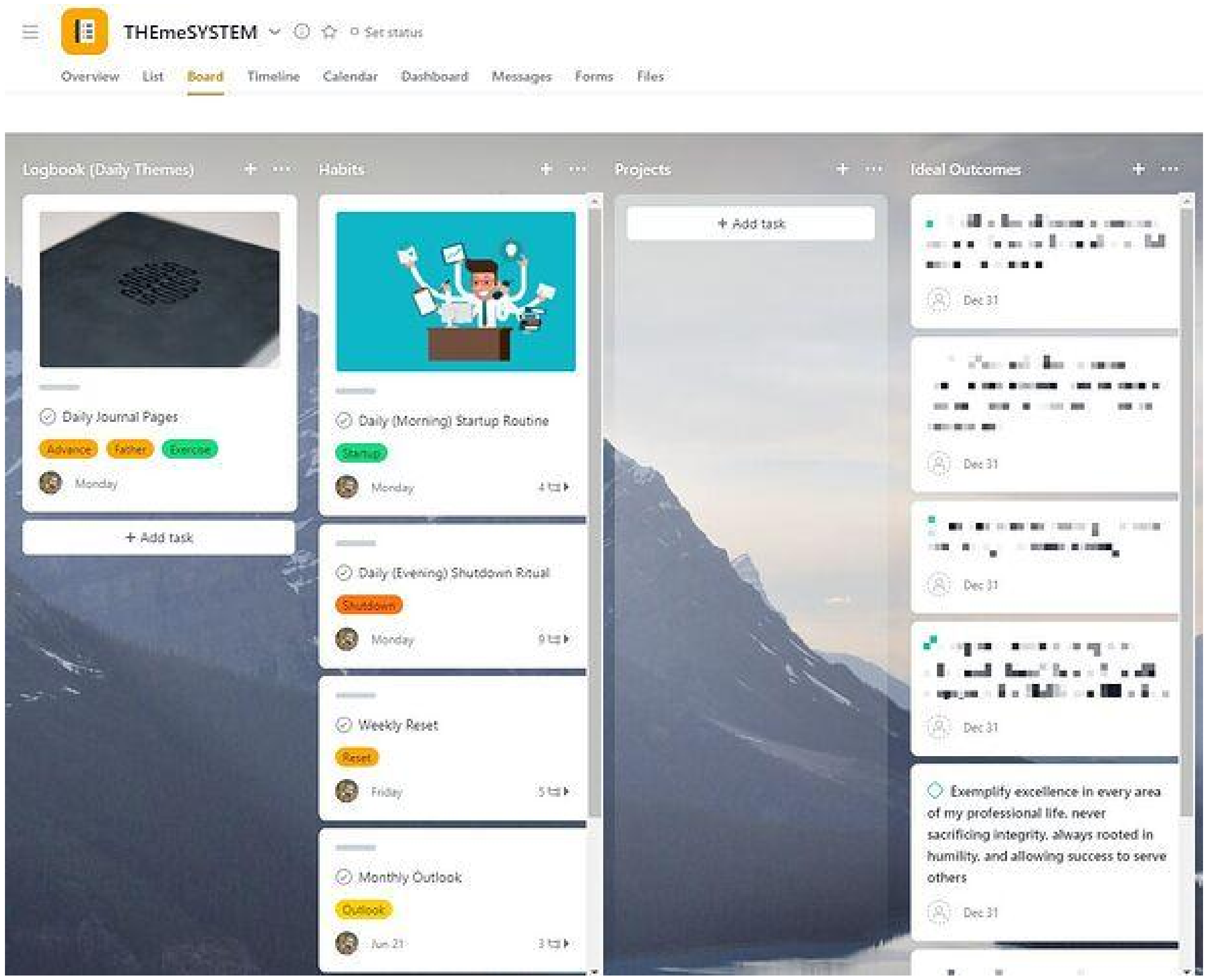
Board - Clean view of recurring tasks that pertain to habits or journaling as well as any set milestones. Also, allow for multi-homing of special projects that relate to areas of focus.



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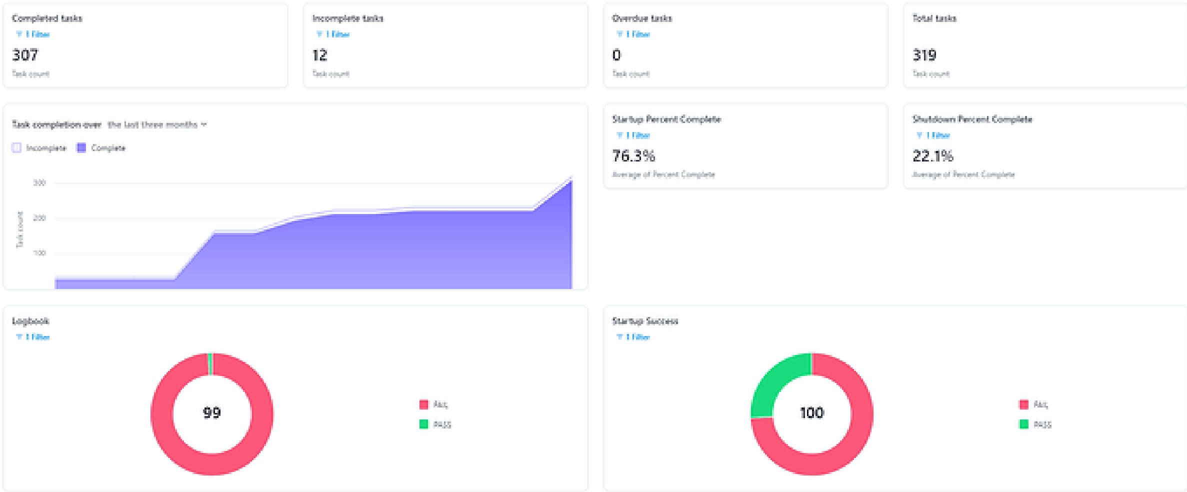
Dashboard - Allows the metrics to motivate you or help showcase how you are prioritizing your set objectives.



Clearly, I don't prioritize journaling and I do a much better job with my startup over my shutdown. Get it together, Jerod! 😝

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Custom Fields - Set these to add context to the items you are tracking over time

- Which area of focus you are working against over a period of time
- PASS/FAIL rating on habits
- Percent Complete on subtasks contained within habits

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Rules - Since Custom Fields are being used on recurring tasks, allow Automation (Rules) to clear any custom fields upon completion! 🚧 [Recurring task retains 'task progress' and limited scheduling options - #6 by Marie](#) 🚧

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Inbox Notifications - Allow specific actions related to your habits to consolidate within any other Asana tasks that are due each day. These daily reminders help motivate me just as Bastien Siebman points out:

💡 [Use Asana as a habit tracker](#)

"seeing that task every day motivates me and creates a habit in my brain!"

[Link to this tip's discussion thread in the Asana Forum](#)

Reporting & Search

5 ways to share progress using milestones

Bastien Siebman

Milestones are just tasks you decided to turn into a milestone. The differences between a task and a milestone are pretty thin, but they are enough to find new ways to share progress.

First, a milestone is usually a better way to communicate progress. Completing a milestone has more meaning than completing X tasks because the number of tasks between milestones could be widely different, the milestones themselves are rare enough to give them special importance.

If you are ready to use milestones in your projects, here are 4 ways to share progress with your team and stakeholders.

1 You can use the advanced search to find milestones specifically, within several projects. The search can then be saved as a report you can share or report back to.

2 The milestones from several projects could be multihomed into a dedicated project, meant to only host milestones. That project could be shared with stakeholders, giving them access to the milestones only and not the rest of the projects.

3 If you are on Business, you can use Portfolios. Inside a portfolio, you can then decide how the progress is being reported, either with task completion or milestone completion.

4 Finally, when using Portfolios you get access to the Portfolio Timeline. That view, in addition to show projects and their dates, only shows milestones.

5 The brand new Overview tab shows milestones of the project! Thanks, Jerod Hillard for this one.

There you go - 5 ways of using milestones to share progress!

[Link to this tip's discussion thread in the Asana Forum]

Reporting & Search

Creating Goals (OKRs) in Asana: Clarification and Best Practices

Larry Berger

New post for those trying to understand and make use of yesterday's new Goals feature immediately:

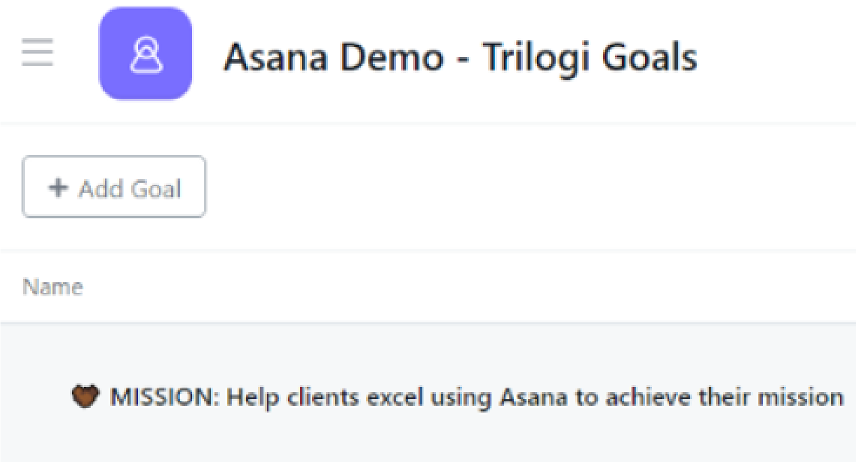
[Creating Goals (OKRs) in Asana: Clarification and Best Practices]

This article offers some helpful explanations and simple best practices for putting Asana's new Goals feature to use, especially for OKRs.

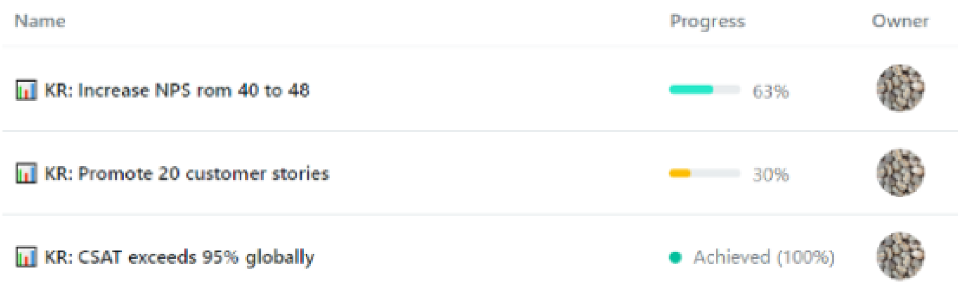
Reading time: 5 min read

Among the suggestions offered:

- **Adding your Mission**:



- **Distinguishing Key Results**:



[Link to this tip's discussion thread in the Asana Forum]

Reporting & Search

😋 How not to be bothered by archived projects in the autocomplete

Bastien Siebman

During my last Asana consulting call, a client gave me a good challenge: how to hide archived projects from showing up in the project auto-complete of a task, without deleting the projects altogether?

Here is the trick we found:

1️⃣ At the top of each archived project, create a task named for example « Project: XXXX »

2️⃣ Rename the project with a random name (or the date)

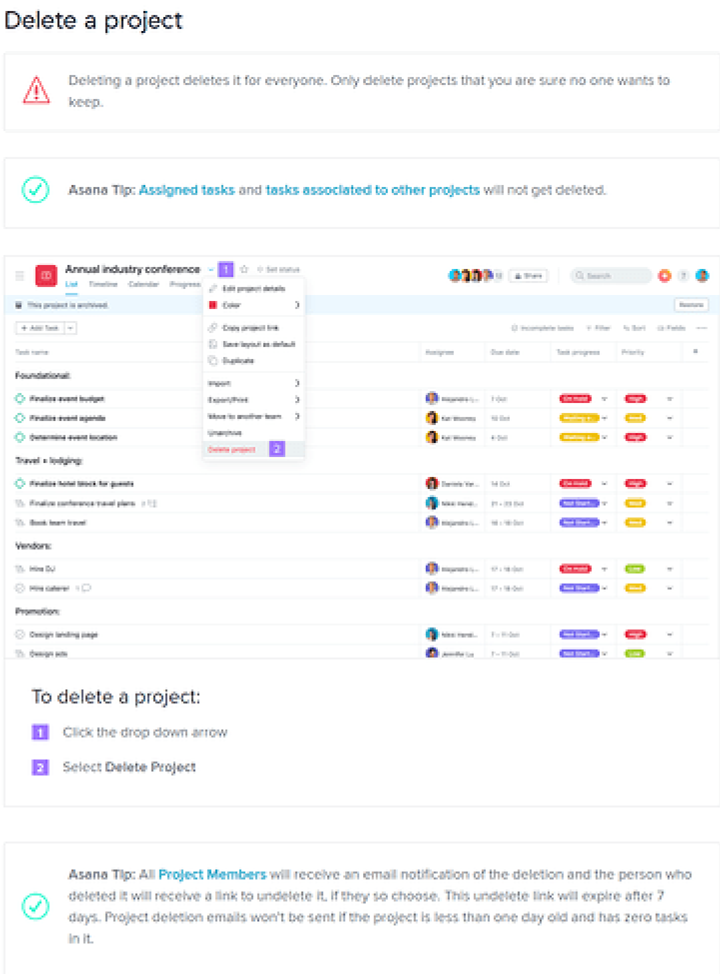
You'll still be able to find the project by searching for the top task, but because you renamed the project it won't bother you as much in the project auto-complete.

[Link to this tip's discussion thread in the Asana Forum]

Best Practices when deleting a Project

Jerod Hillard

As you work within Asana you might occasionally find that a project is no longer needed. Asana offers the capability to Archive a Project, but you might find in specific instances that the data within a project is no longer needed. As shown below, the Asana Guide highlights steps to take when deleting projects and things to consider when performing this action.



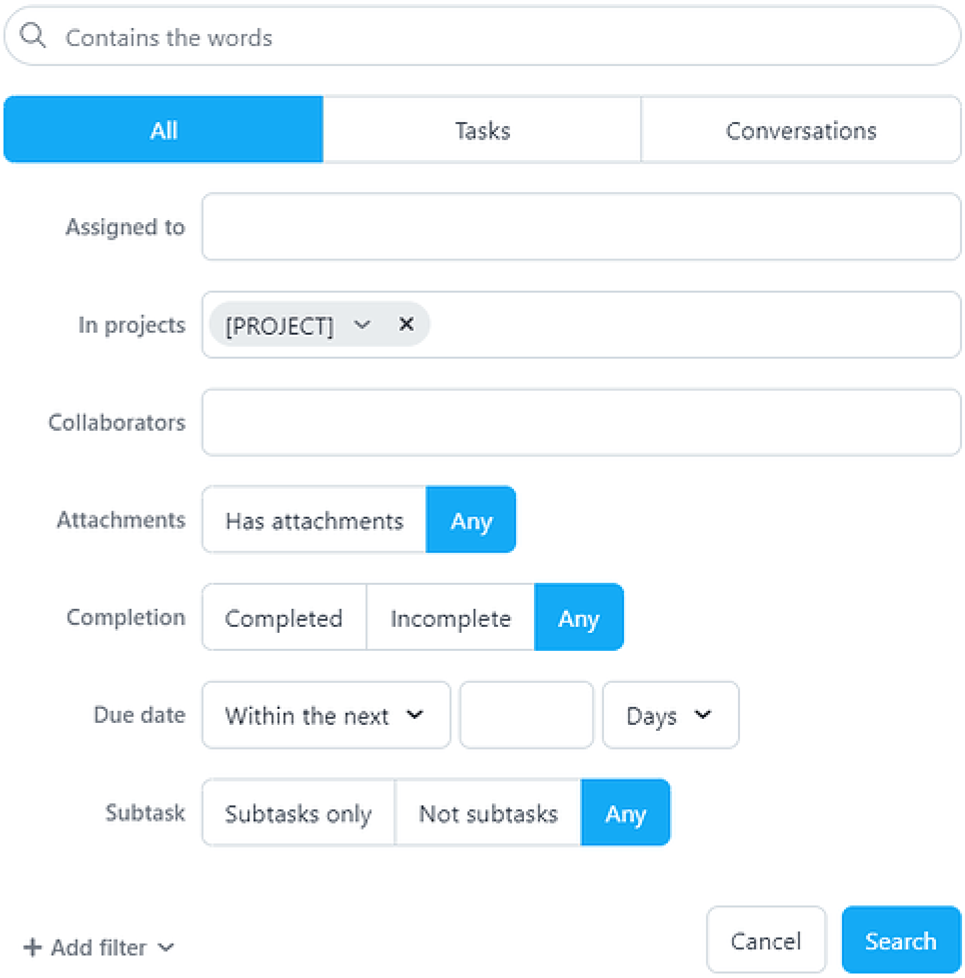
This is great information, but what about subtasks? What are the necessary steps to ensure that when deleting a project you aren't left with an "orphan task"?

When deleting a project, tasks that meet one of these conditions will remain within Asana after deleting a project:

1. Tasks that are assigned
2. Tasks that are multihomed to another project
3. Subtasks where the parent task remains (not deleted)

4. Subtasks that are multi-homed to another project (those that are assigned will be deleted, if not multi-homed or having a parent task that remains)

Knowing this, what is the "best practice" to completely purge a project where none of the tasks or subtasks are required any longer? - >>> *un-assign at all levels with no multi-homing assignments!* This can be achieved by performing an Advanced Search if you filter to the project in question AND add a subtask filter to show all tasks associated with the project, as seen below. Simply bulk-select any items that are no longer needed and remove the assignee and any other projects the task (or subtask) is mapped to.



While deleting projects might not be a "best practice" itself, we all may have situations where information might need to be purged (*such as when you import a project via CSV but learn your import file has some errors that need to be addressed/imported against*). To prevent uncovering orphan tasks over time, consider the steps listed above. Cheers!!!

Link to this tip's discussion thread in the Asana Forum

Reporting & Search

💡 Does « Tasks I’ve assigned to others » show up things delegated twice?

Bastien Siebman

Weird Asana question of the day: what if Bob assigns a task to Alice who delegates it to Monica? Who sees the task in their « Tasks I’ve assigned to others » report?

The answer is: Bob and Alice both see the task. And if Monica assigns it back to Bob, then Alice and Monica both see the task.

And also when assigned back to you, the task does not show up in your report anymore.

You can go back to your day, thanks for listening 😬

🇫🇷 Version française

Link to this tip’s discussion thread in the Asana Forum

Reporting & Search

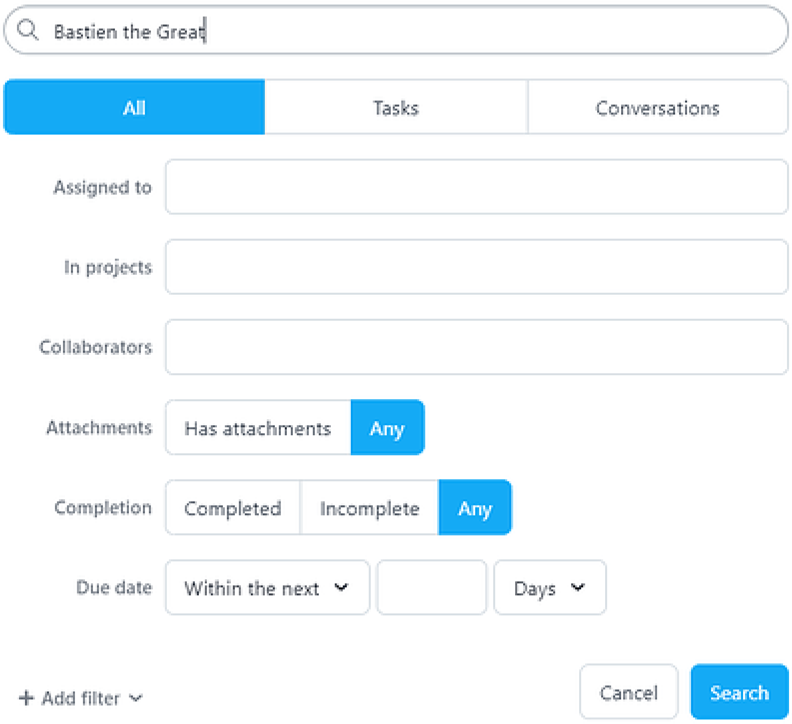
The Power 💪 of @mention & Advanced Reports combined

Jerod Hillard

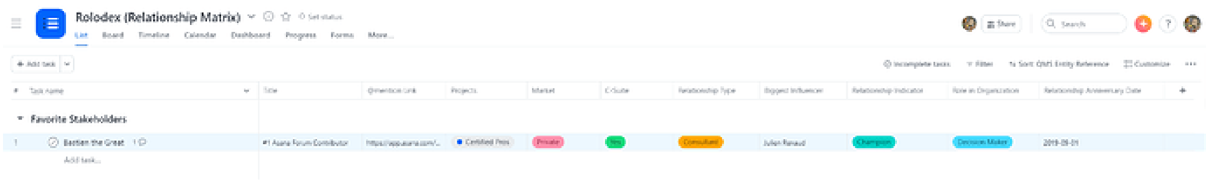
💡 Did you know that you can perform a search for @mention links?

❔ Have you ever needed to track specific phrases when entered within the description or comment fields?

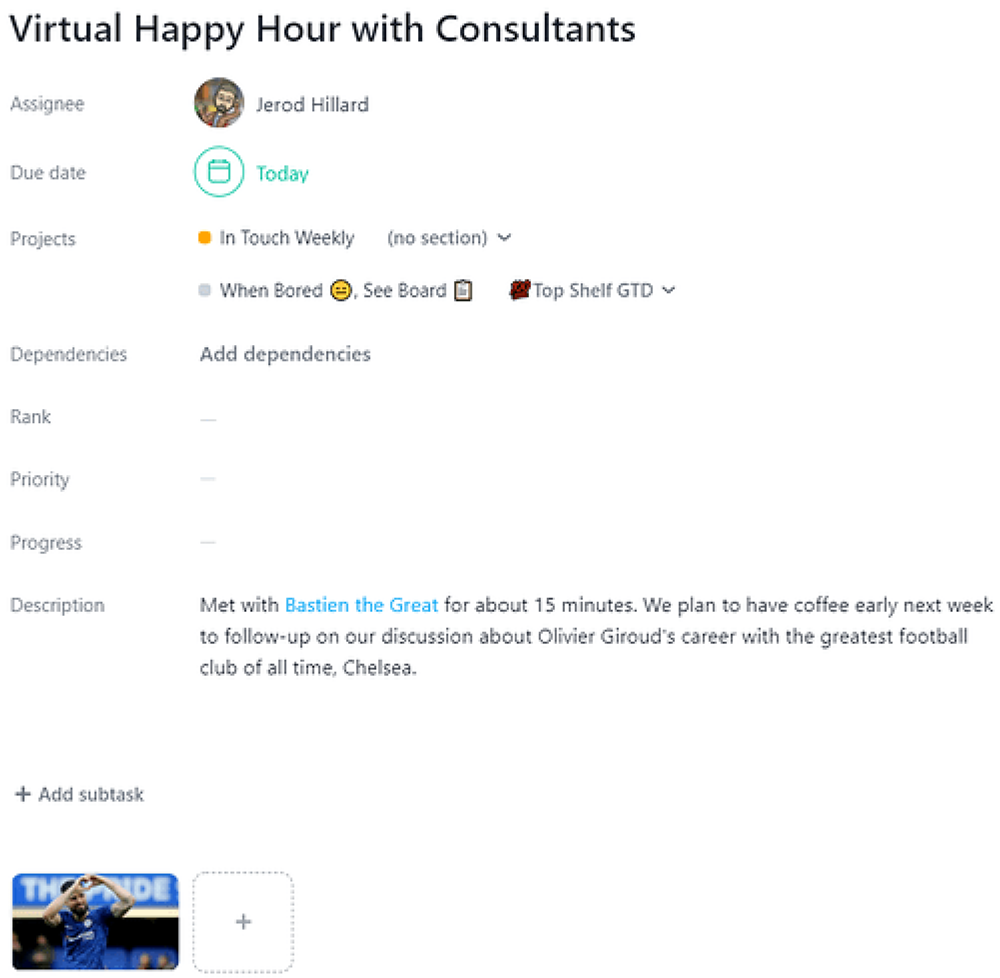
A prime example might be when you are using Asana to serve as a CRM and you want to know when specific stakeholders are "mentioned" throughout the details of tasks within projects. You could create an Advanced Search that "contains the words" (as shown below - in this case, we are looking for tasks that mention our favorite stakeholder, Bastien the Great) ...



... *however*, this might not provide the precise results you are looking for. Instead, let's look at how we might use a task called Bastien the Great which lives within a project that lists out all your stakeholders, as seen below:



Since Bastien the Great is a task within a project, you can now **@mention** it whenever you provide updates throughout Asana that involve this stakeholder. Being that stakeholders aren't a part of your Organization and it might not always be appropriate that they serve as a Guest within your projects, this approach allows you to still reference them when they aren't an available Collaborator. Here is an example where I **@mention** Bastien the Great.

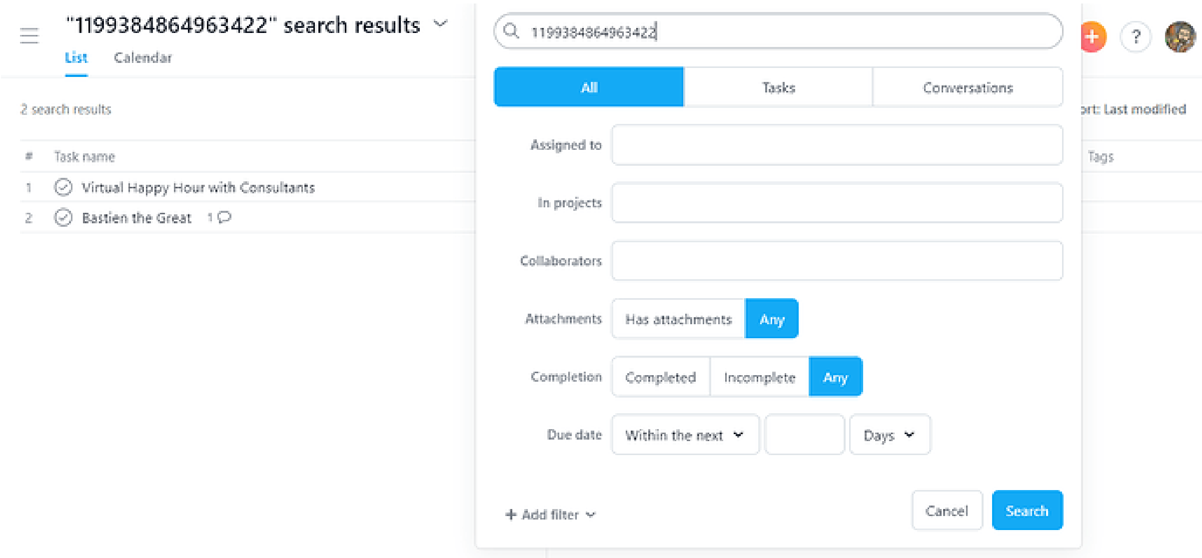


If I click on this **@mention** it takes me back to the original Bastien the Great task. This task has a task link of "https://app.asana.com/0/1181732105212139/1199384864963422".

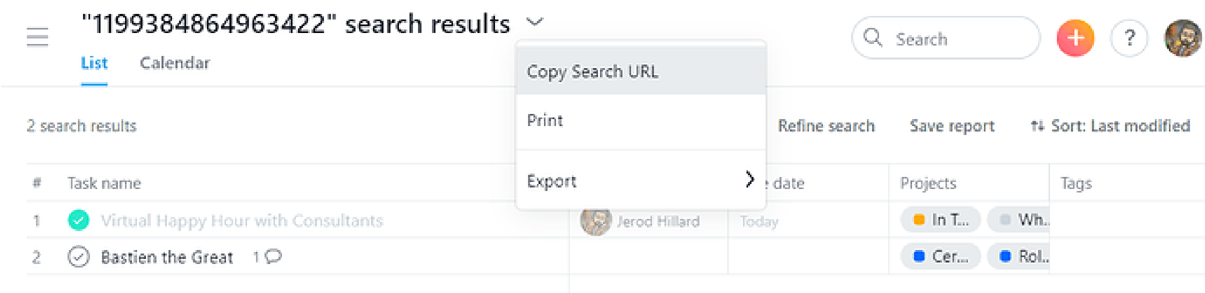
For those that aren't aware, the "1181732105212139" portion is the Project ID from which the task is being viewed. The "1199384864963422" is the task ID.

If I don't reference the Project ID in the web link (like this: "https://app.asana.com/0/0/1199384864963422") it will redirect to the project in which the task originated from (assuming the task is multi-homed to several projects).

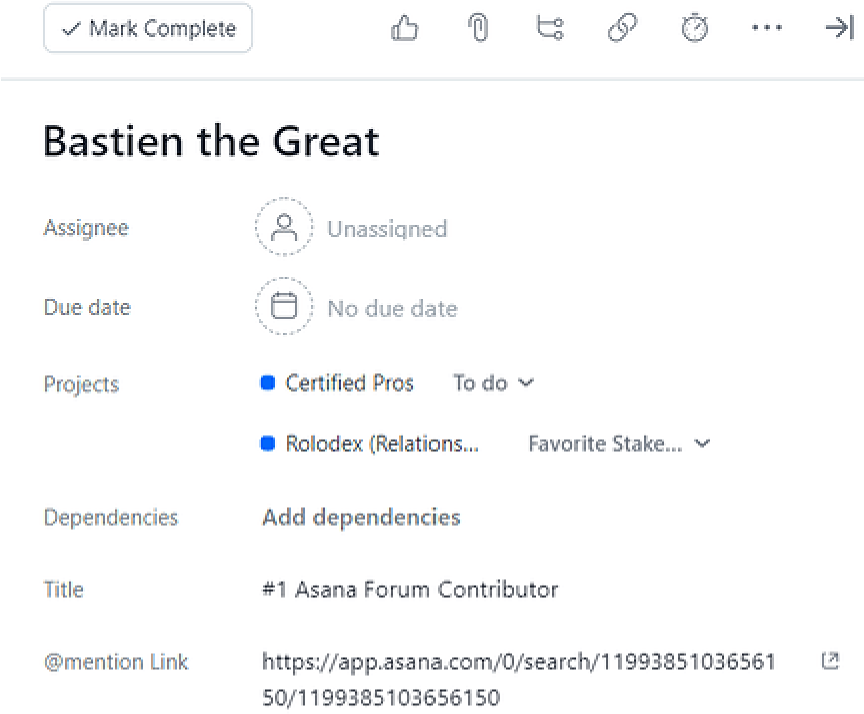
Anyhow, if I perform a simple search for the task ID, this will give me a list of ALL the places in which the @mention for [Bastien the Great](#) is referenced within a task description or comment.



Now, I can choose to save this report so I have a dynamic reference to this specific **@mention** OR I can choose to copy the search URL (as shown below) and paste it into a dedicated Custom Field called "**@mention** Links" which was created within the stakeholder project that the [Bastien the Great](#) task belongs to.



Below is a screenshot of the Custom Field where the **@mention** link can be stored so I am always one-click away from seeing where this reference is used throughout Asana.



Hopefully, you found this to be a creative use case for the powerful **@mention** feature. Especially those that could benefit from this type of setup when using Asana as a CRM.

[Link to this tip's discussion thread in the Asana Forum]

Reporting & Search

💡 Sort by date… when there is no date field

Bastien Siebman

Here is the trick of the day!

📅 Custom fields of type Date don't exist yet, so usually people use a text field to store some date on a task (that is not the due date).

If you want to be able to sort the task list based on that field, make sure to input dates in YYYY-MM-DD format. That way, an alphabetical sort will be in chronological order!

Pretty cool right?

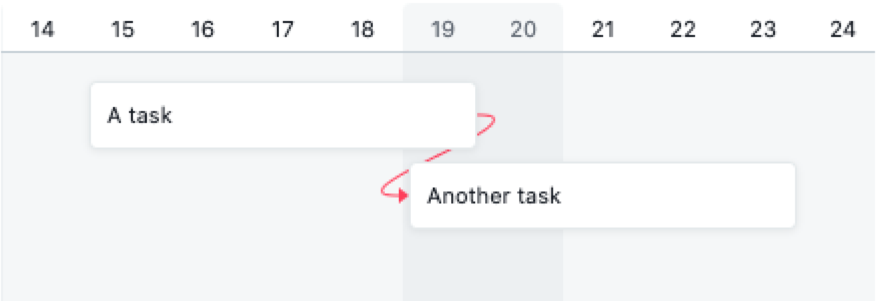
[Link to this tip's discussion thread in the Asana Forum]

Reporting & Search

🚨 Same-day dependency broken

Bastien Siebman

When using the Timeline view, you might have realized that if you have a dependency between two tasks, one finishing the same day the next one starts, the dependency will show as conflicted (red).



As a project manager, be careful and be aware of that behavior. Sometimes, your schedule doesn't allow you to have the next task start the next day just to have a nice timeline! But if you can have the task start the next day, that might be wise just to avoid the visual conflict.

And remember: when a task is completed, the assignees of the dependent tasks are notified, so they can start working early!

Also remember: you don't get notified of actions you did yourself, so you won't be notified if you completed a task and that frees up your task to begin!

[Link to this tip's discussion thread in the Asana Forum]

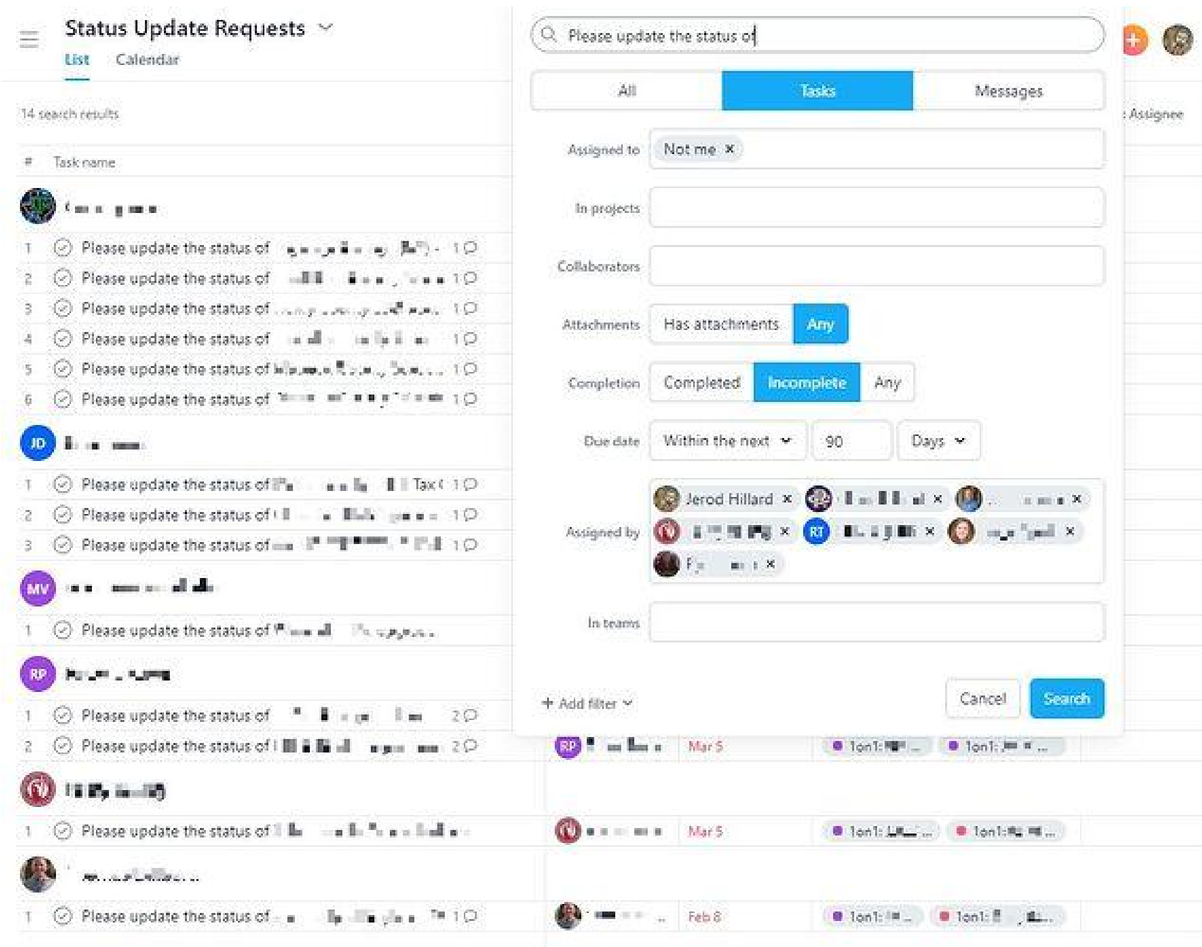
Reporting & Search

🔍 Track Status Update Requests using Advanced Search Reports

Jerod Hillard

If you are a manager of a portfolio or team of people it might be advantageous to be able to track Status Update requests in Asana. Thanks to Advanced Search Reports you can always be one click away from the updates that you have requested of others.

ℹ️ *these status update requests aren't assigned to any particular project by default. For this reason, I like multi-homing them to a 1-on-1 project board that I have with each of the employees. This makes these status updates a priority and ensures everyone has the latest details to close on work.*



Link to this tip's discussion thread in the Asana Forum

💫 Advanced search & the best reports

Bastien Siebman

The advanced search (and the reports) is one of the most underestimated and underused features. Organizing tasks in projects is one thing, building searches (and saving them as reports) is another. With reports, you give even more value to your data. You can do your work more efficiently. You can detect issues earlier.

Here are the best reports I could think of, helped by the community!

---

1. All subtasks in given projects by Bastien Siebman

Subtasks are not always easy to see from the main list

🔨 Add filter > More > Subtask > Subtasks only

🔨 In projects

🔨 Completion > Incomplete

2. Overdue milestones by Bastien Siebman

Milestones are important to measure progress, especially in Portfolio and Timeline

🔨 Add filter > More > Milestone > Milestones only

🔨 Due Date > Within the last > 1 day

🔨 Completion > Incomplete

📝 Also shows today's milestones

3. Overdue tasks by Bastien Siebman

To avoid the overwhelming feeling and make sure the account stays clean

🔨 Due Date > Within the last > 1 day

🔨 Completion > Incomplete

📝 Also shows today's tasks

4. Incomplete project status update by Jerod Hillard

To find any status update reminder that was not completed

🔨 Search terms “Please update the status of”

🔨 Completion > Incomplete

5. Tasks without a project by Jerod Hillard

If your policy is to always attach tasks to a project

🔨 In projects > No project

🔨 Completion > Incomplete

🔨 Add filter > More > Subtask > No subtasks

6. Incomplete tasks without a comment by Jerod Hillard

Those tasks might be a list

🔨 Completion > Incomplete

🔨 Add filter > More > People > Commented on by > Nobody

7. Incomplete and overdue high priorities by Bastien Siebman

Those are the tasks you should focus on first

🔨 Completion > Incomplete

🔨 Add filter > More > Custom Fields > Priority has value High

🔨 Due Date > Within the last > 1 day

📝 Also shows today’s tasks

8. Last week team’s work by Bastien Siebman

To have an overview of what your team worked on

🔨 Add filter > Date > Completion date > Last week

🔨 Assigned to > team member

9. Manager delegation "volume" by Bastien Siebman

To have a sense of how much a manager is delegating

🔨 Add filter > People > Assigned By > Manager

🔨 Add filter > Date > Creation Date > Within

10. Overdue but blocked tasks by Bastien Siebman

Those are the tasks you should focus on first 🙂

🔨 Add filter > More > Dependencies > Blocked

🔨 Due Date > Within the last > 1 day

📝 Also shows today's tasks

11. Laser focus tasks by Tyler Now

What you should focus on when overwhelmed.

🔨 Assigned to > You

🔨 Completion > Incomplete

🔨 Due Date > Within the next > 14 days

🔨 Add filter > Add custom field > Approval stage > Is not > Ready for Review

🔨 Add filter > More > Dependencies > Not blocked

📝 You can also filter on "Not waiting on client" if you have such a custom field

[Link to this tip's discussion thread in the Asana Forum]()

Reporting & Search

What is Workload without knowing your team's OOO (Out of Office) time?

Jerod Hillard

Resource Management is such a huge challenge within my company - generally a difficult thing to conquer in any line of work. You need people to close deals, people to revenue the work, people to train the people, and sadly… even people to (what often seems like) babysit people. It is difficult to know who is available when or who is burdened doing what… if you don't have a holistic capture of the work.

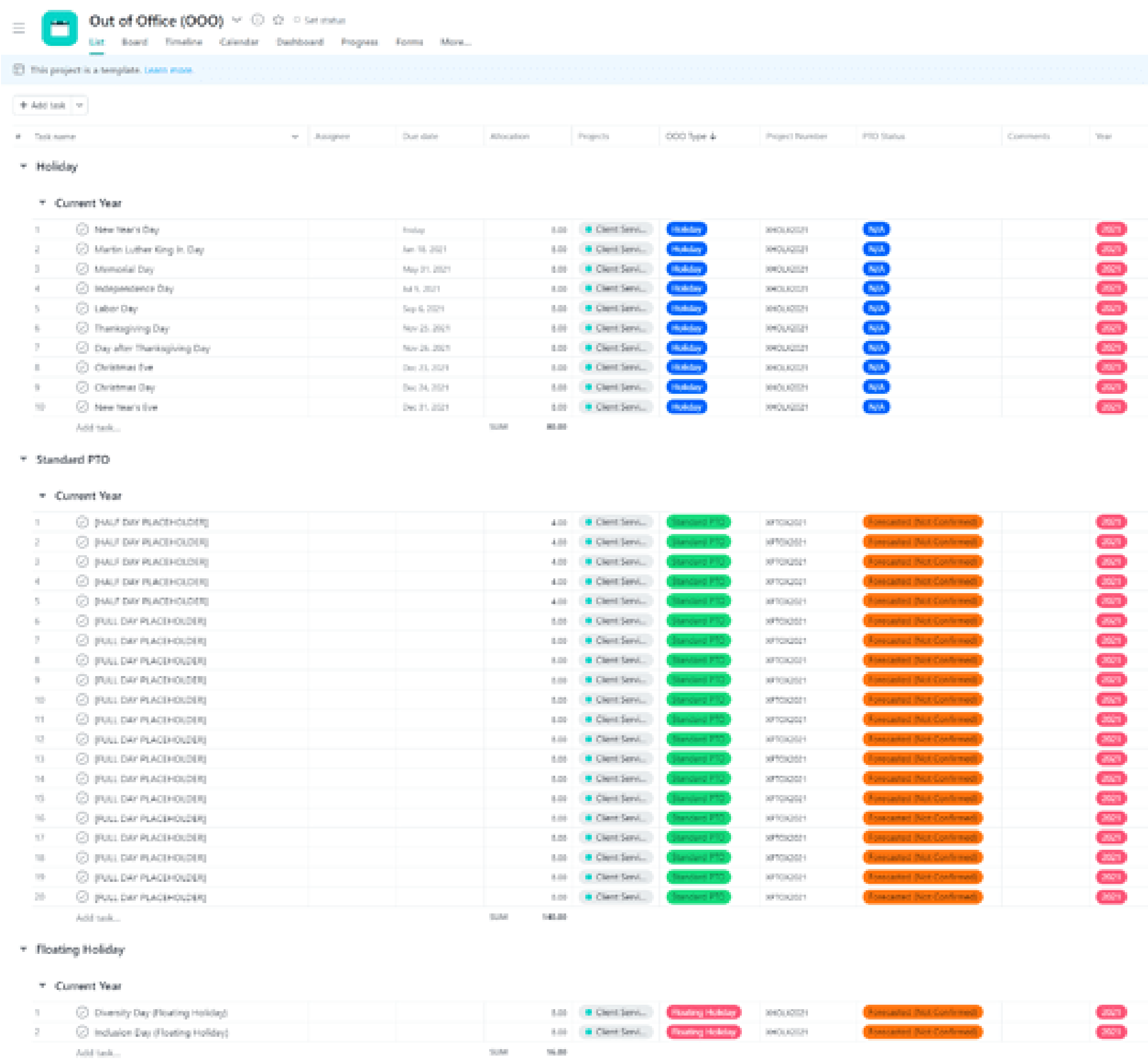
As my team continues to dig deeper into how we capture and manage our Workload through Asana, it is important to make sure we also consider the time when we are scheduled NOT to work. I can't effectively set a capacity on the effort in Workload unless I introduce the volatility of the time away from work.

With this tip, I'll simply share a structure to manage Holidays and Personal Time Off (PTO) among a team using Asana Business. This can be done in just a few simple steps:

1. Create a Project Template that includes all the upcoming Holidays and placeholders for PTO that users can forecast themselves
   - Include the common Custom Field that defines your Workload effort
   - Add additional custom fields to delineate the data over time or denote the status of PTO
   - You might also consider including references like job codes that users should charge time to - if that is often something that gets overlooked or mismanaged
   - Most importantly, be sure to have all tasks multi-homed to a master project that pulls in ALL of the tasks created from this template so there is a single project that could be added to any other Portfolio
2. Create the aforementioned Master Project where all tasks from the Project Template can be multi-homed
3. Add a Rule to the Project Template that multi-homes any new tasks to the Master Project
   - This will be key once users start to define their PTO and look to create/delete tasks within their copy of the template.
   - **Please note**: Even though there is a rule within the Project Template that multi-homes new tasks to the Master Project, this rule doesn't run when templates are used (duplicated). Therefore, you'll need to make sure all tasks within the Project Template are indeed multi-homed to the Master Project. Unfortunately, this will show unassigned tasks for those with pre-selected dates.

4. Create a Portfolio with either the Master Project or each of the individual Projects customized by team members
    - If setup correctly, the result is the same - as the Master Project is simply a collection of the rest

That's essentially it. Now the team can manage their time away from a central place and see how this time impacts the actual work they have allocated or planned. Below is a screenshot example of what a template could look like.



BONUS: For those interested in seeing the data in greater detail, there are tricks to leveraging the Google Sheet integration so you can do things like:

- Manage the use of an individual's PTO bank (time remaining, time overbooked, time not forecasted, etc)
- Manage the scheduling of floating holidays (where applicable)
- Charting to track M2M utilization
- Look-ahead charts (below) to see who is IN/OUT when over a stretch of time

Week 1							Week 2						
Thu, Dec 17	Fri, Dec 18	Sat, Dec 19	Sun, Dec 20	Mon, Dec 21	Tue, Dec 22	Wed, Dec 23	Thu, Dec 24	Fri, Dec 25	Sat, Dec 26	Sun, Dec 27	Mon, Dec 28	Tue, Dec 29	Wed, Dec 30
OUT	OUT	WEEKEND	WEEKEND	OUT	OUT	OUT	HOLIDAY	HOLIDAY	WEEKEND	WEEKEND	OUT	OUT	OUT
IN	IN	WEEKEND	WEEKEND	OUT	IN	IN	HOLIDAY	HOLIDAY	WEEKEND	WEEKEND	OUT	IN	IN
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[Link to this tip's discussion thread in the Asana Forum]

Reporting & Search

💡 Search does not have to involve a text

Bastien Siebman

I talked with a client today and they told me “we usually don’t use the search because it does not search inside comments for example”. I asked about reports (saved search) and the answer was the same: they kind of discarded the search from the beginning.

But the search is not always about searching for text! The Advanced search is very powerful, and usually, good reports involve a lot but not the text: presence in projects or not, the value of a custom field, assignee, due dates… Don’t limit yourself to the text search!

Link to this tip’s discussion thread in the Asana Forum

Reporting & Search

💡 How to build a view of all milestones

Bastien Siebman

You might be interested in building a project with all the milestones from all the projects. Here is how to do it with a couple of simple steps:

1. Create an empty project
2. Run an advanced search for Incomplete Milestones that are not in that project
3. Save the search as a report
4. Regularly visit the report, multi-select all milestones, and multi-home them into your project

Not that hard, is it? You could also directly use the report, but at the moment they do lack some features compared to a regular project.

[Link to this tip's discussion thread in the Asana Forum]

Reporting & Search

Using Portfolio Timeline on ⏲️ Timeless Projects

Jerod Hillard

Do you have projects set up that are timeless? for instance, projects that hold tasks for clients, custom templates, productivity boards, etc.

More importantly, **do you love 🤟 being able to see key Milestones from a Timeline view within a Portfolio?**

😨 Fear no more 🙅‍♂️... **simply make sure the Milestones have a due date**. Originally, I was under the impression that you had to set a project date range for an extended period for the Milestones to be plotted. This isn't the case! In fact, it is recommended you don't do this as Milestones are easier to detect without an extended overlay of the project within the view.

Disclaimer: *No need to set a Project date range if you want to be able to view the Timeline at the Project level either.*

Link to this tip's discussion thread in the Asana Forum

Reporting & Search

Manage resources like a boss 😎 in Asana: meeting rooms, cars, camera...

Bastien Siebman

Asana introduced workloads a couple of months ago to manage the workload of people. At the same time, I kept seeing the same request: how to do resource management in Asana.

Whether it is for cars, scooters, or cameras... many businesses need to know which resource is used and if there are conflicts in allocation.

Let me introduce a new innovative way of managing your resources in Asana using a Business account 🥁

0️⃣ Example context

You are a consulting firm and you have 2 Teslas and a Vespa to go see clients in Paris for whom you organize events. You can't have two people using the same vehicle the same day to go to different places.

To simplify, we'll say that people use a vehicle for the entire day (that solution would not work as well with fractions of days).

1️⃣ First step: each resource is a dedicated Asana account

Wait, what? Yes, you read me right: each Tesla and the Vespa have a dedicated account. To not use paid seats, you'll have to create guest accounts. And to avoid creating dedicated emails addresses, you can use the following trick.

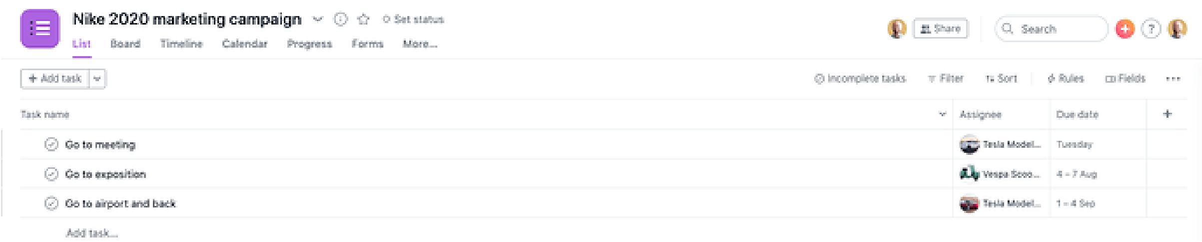
siebmanb@gmail.com is my personal email address. siebmanb+vespa@gmail.com is seen by Asana as a different email address, but Gmail sees them as the same. So I can set up the account and manage it myself without creating a new email address.

For each account, choose a nice picture and a name. Here is the result.

I know what you're gonna say. "We have 50 vehicles, we can't do that!". Really? Even if that takes 1 minute per vehicle, that is less than an hour to set up something you'll use daily.

2 Assign tasks to vehicles

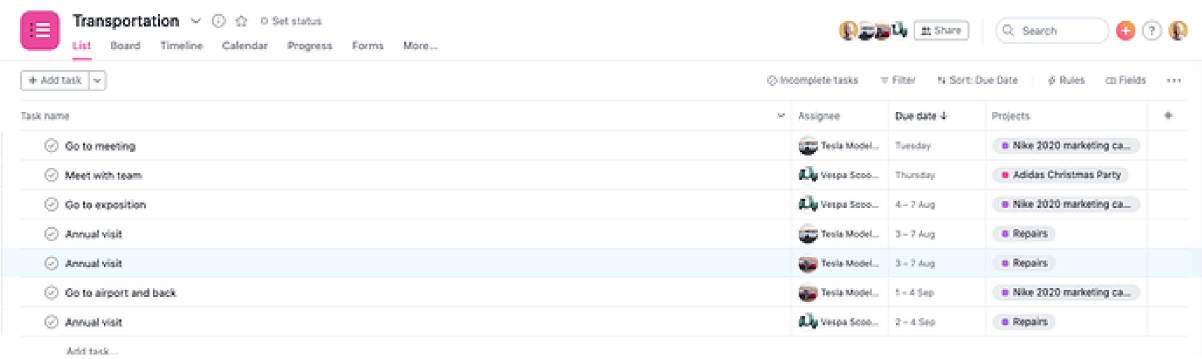
Then, whatever your system is, you need to start assigning tasks to vehicles with due dates. For example on a client's project, if you have a task for a meeting, you can have a subtask for transportation like "Go to meeting" which you assign to the Tesla Model X for Monday.

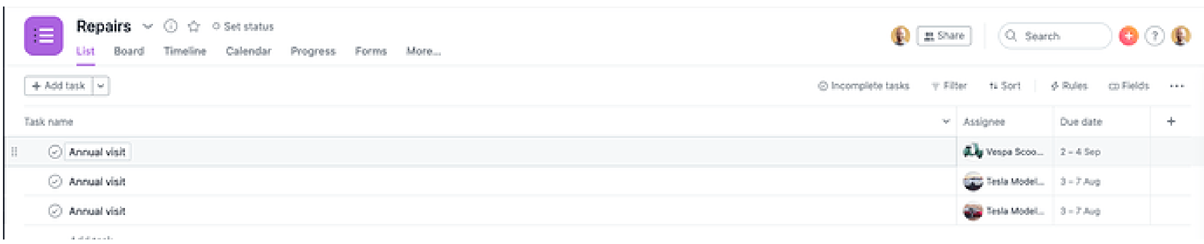


2 bis: Alternative with a transportation project

Alternatively, you can create a project to manage transportation and multi-home tasks there. The project could give you access to custom fields such as the constraint you have for the vehicles. For example, even if you book the Tesla Model X, you could set up the proper custom fields to say that what you need is a 2-seat vehicle, allowing the resource manager to switch you with something else.

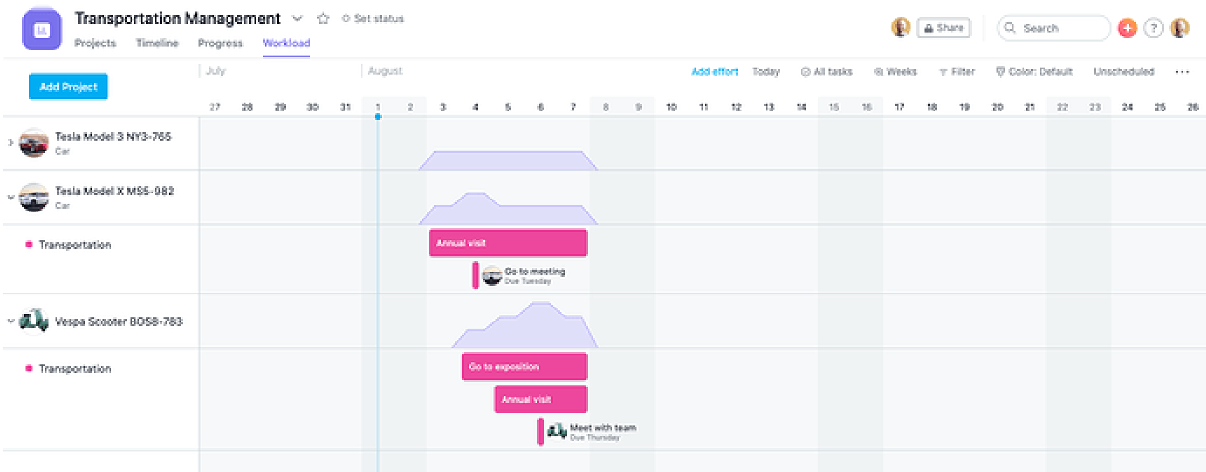
Here is the project. As you can see in the projects' list, I also have a repair project so I assign vehicles for their annual or recurring repairs.





3️⃣ And now, the magic

Create a portfolio with the Transportation project OR every single project managing vehicles. And you get a nice resource management view 🍾



We can see that the Vespa has been booked by someone to go to an expo and meet a client team. But the annual visit to the repair shop happens at the same time. By drag and dropping tasks between different vehicles, you can manage your entire fleet. Employees just need to check their Asana on the day they need their vehicles and see which one was assigned to them based on their constraints. And if you add a driver name custom field in the transportation project, each employee can build a custom report to see all the tasks assigned to a vehicle they are supposed to drive.

[Link to this tip’s discussion thread in the Asana Forum]

Reporting & Search

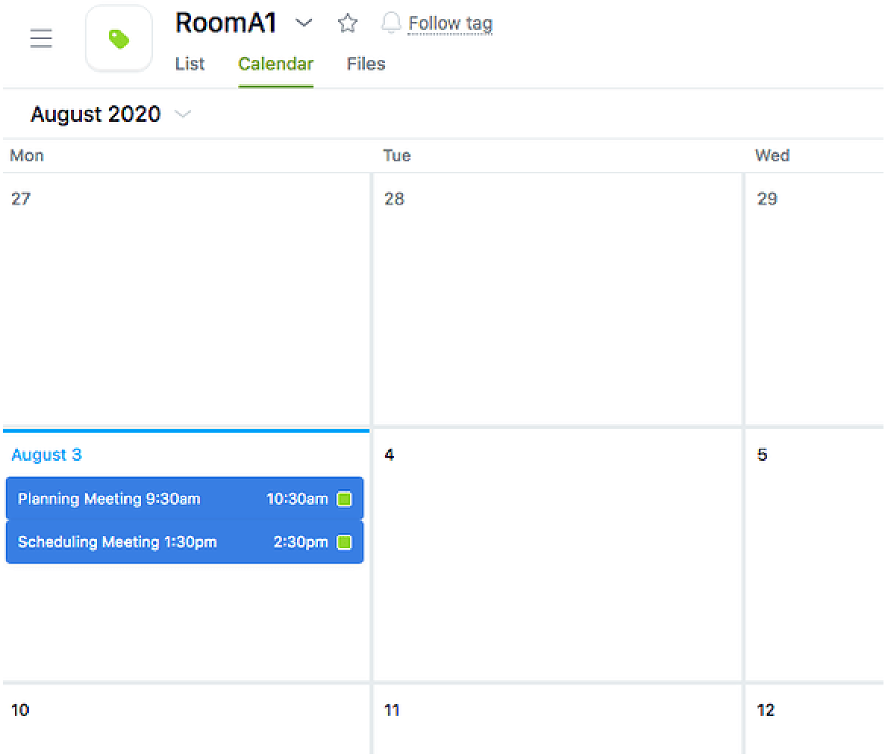
Resource Management (meeting rooms, company cars, etc.) the Free and Easy Way in Asana

Larry Berger

Use the Asana free version (you don't need Premium or Business plans) to easily manage shared resources like meeting rooms, company cars, tools, equipment, etc.

In any task, like "Planning Meeting" below, add a tag like RoomA1 meaning you need the A1 meeting room resource. (Pick a unique name for each resource, like RoomA1, RoomA2, Car1, Car2, etc.)

To see all the bookings for the RoomA1 resource (e. g., to check the room's availability) just type RoomA1 in the search box and click on the tag, then click the Calendar view tab. (Or you can save a search report to default the tag view to Calendar automatically):



Note that if you need to schedule by the time of day (as opposed to all-day tasks only) you could do as I did above and include the start time for the resource usage at the end of the task title (like 9:30 am above), and use the Due Date/Time for the end time (10:30 am).

[Link to this tip's discussion thread in the Asana Forum]

💡 Why use Universal Reporting in place of the existing Dashboards within projects?

Bastien Siebman

The new Universal Reporting feature looks a lot like the existing Dashboard tab on projects. Which makes sense because it is the same feature, well almost exactly. So you might ask yourself: why would I use Universal Reporting instead of just having several dashboards?

The 1️⃣st reason is about comfort. It is easier to have everything in the same place. In my case, even for charts specific to a project, I moved them into a Report for easy access.

The 2️⃣nd reason is that it allows you to build charts with source data coming from various projects. For example, you can mix that data if you have design requests inside a web-design project and print project.

The 3️⃣rd reason: you can put next to each other charts using different sources, to compare them or easily analyze them. For example, spendings on the left and earnings on the right.

Finally, the 4️⃣th reason: Universal Reporting allows you to share a dashboard without sharing access to the projects. The dashboard will contain exactly the same data as you would see them, without revealing the exact content of the projects!

Bonus 5️⃣ from Jerod Hillard: you can apply the sweet new dashboard icons as well as provide a dashboard description that highlights the key items to absorb from the visuals. You even gain the ability to Favorite ⭐ a Dashboard within Reporting.

[Link to this tip’s discussion thread in the Asana Forum]()

Reporting & Search

🔍 The difference between a Saved Search and a Favorite

Jerod Hillard

The differences between a Favorite (and item in Asana that you “star”) and a Saved Search may not always be apparent. Many new users might assume that by default a Saved Search is a Favorite. **So what are the differences and why are they separate?**

First, I’m assuming you noticed that you have an area for **Favorites** AND **Saved Searches in the left navigation pane**, correct? If not, take a peek! Asana provides a collapsible section for each of these in the navigation pane.

It is true: Asana treats these items separately. While I completely understand that some Saved Searches take priority over others, there isn’t a way to add these to your Favorites in the current model.

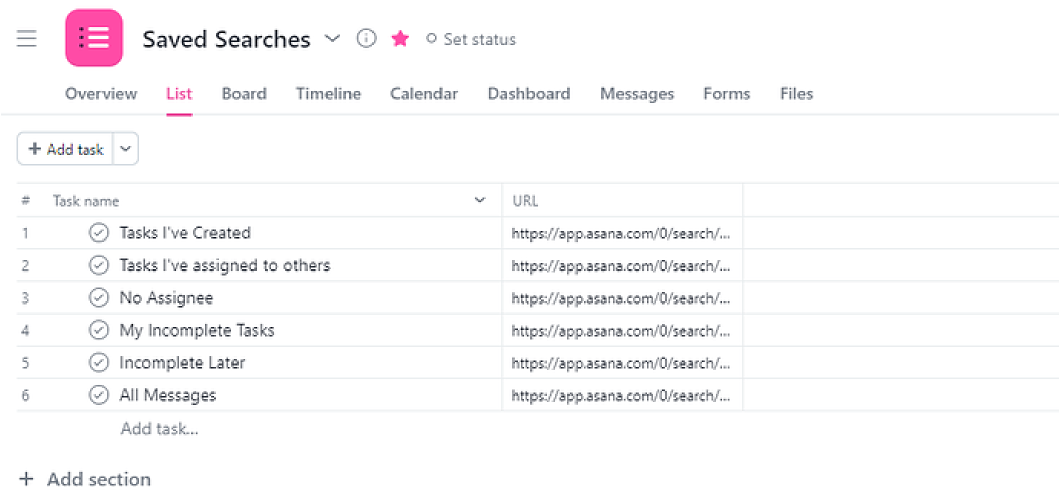
Favorites are primarily used to star single components within Asana:

- Portfolio
- Dashboard (Reporting)
- Team
- People
- Project
- Tags

The **Saved Search** is designed to save any advanced searches that need to be referenced later; most often when users want to see tasks filtered by a variety of components within Asana (including dates, custom fields, dependencies, etc). These Saved Searches have the flexibility to be renamed and shared with other users within your org. When you share the links to these the other users will even be able to see what you named the search *AND* the name of the search is recognized throughout Asana if you were to paste it into a comment or description.

Workaround to “star” Saved Searches:

If you must be able to see the higher priority Saved Searches, one workaround might be to create a project dedicated to such and add it to your Favorites. As shown below:



[Link to this tip's discussion thread in the Asana Forum]

Section 5: Admin, Setup & Security

Admin, Setup & Security

💡 How to prevent a custom field value from being changed

Bastien Siebman

Even if Asana is all about openness and transparency, sometimes you just want to lock down a specific custom field and forbid any change. This is not possible in Asana (yet?!).

Here is the trick to use as a workaround:

1️⃣ Create a project private to you, named « Illegal custom field value change »

2️⃣ In the project you want to watch, set up a rule → when custom field value changes, add a task to the project created in (1)

If you set up the notifications properly, you'll be notified of any new task coming into the watch project, and you'll be able to roll back the value of the custom field by looking at the history trail of the task.

🇫🇷 Version française

Link to this tip's discussion thread in the Asana Forum

➕ Why add a member to a public project in a team?

Bastien Siebman

In Asana, a team member will see any public project from the team. So why on earth would you need to add them as project members as well?

There are 6 possible reasons:

- you want specific permissions for those members (everyone can edit, those members can only comment)
- you want specific permissions for others (everyone Comment only, those members can edit)
- you want a member to be the owner of the project
- you want them to be notified of a new task (see project notification settings)
- you want them to be notified of a new conversation (see project notification settings)
- you want them to be notified of a project status update (see project notification settings)
- you want guests to see each other (otherwise they don't, here's why)

Apart from those reasons, it is way easier to not add team members as project members, as they will see the project by default.

Link to this tip's discussion thread in the Asana Forum

Admin, Setup & Security

Architectural Balance in Asana (Ebook Free Chapter)

Larry Berger

"Should I make this a Project or a Team?" This question, and others like it, come up often when starting something new in Asana, for both novices and experts alike. And it's just the tip of the iceberg.

How can you envision the structural, big-picture view of what you want to accomplish and translate that into an architectural framework in Asana that will enable your workflows, processes, and information repository needs durably and flexibly, now and as they scale?

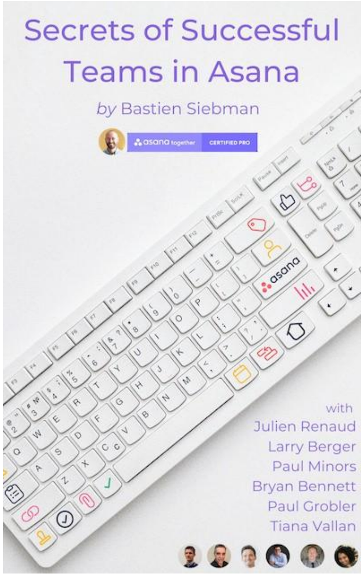
Asana often provides more than one way to accomplish something. This is good: we can do more with Asana as a result. But there's a downside too: How can we avoid less-desirable solutions, and especially ones that even may lead to dead ends?

This chapter helps you decide how to set up your work in Asana.

. . .

That's the start of my chapter contribution to **Secrets of Successful Teams in Asana**, an ebook by Bastien Siebman, along with experts Julien Renaud, Paul Minors, Bryan Bennett, Paul Grobler, and Tiana Vallan.

This ~~long-winded~~ substantial chapter is yours free (all rights reserved) here:



Architectural Balance in Asana (Ebook Chapter)

Larry Berger, Asana Certified Pro, Trilogi Solutions

Reading time: 9 minutes

Learn more from Bastien Siebmen about the full volume here:

“Secrets of successful teams in Asana Tips and Tricks

I hope the chapter is helpful and I’d love to hear what you think of it; either reply here to this post or over in the Medium comment thread.

Link to this tip’s discussion thread in the Asana Forum

Admin, Setup & Security

🚘 Not everyone wants to look under the hood

Bastien Siebman

When designing your Asana setup, there are two critical steps:

1️⃣ read A framework to evaluate Asana systems

2️⃣ Do not involve everyone

You like creating workflows, deconstructing them, trying again, testing a few solutions, iterating. Not everyone does. Many people just want to receive a working piece, and use it.

At best, you'll confuse everyone. At worst, they will demotivate you by consistently pointing out the solution is not perfect for their own use case (even though you try to find a solution for everyone).

Link to this tip's discussion thread in the Asana Forum

Admin, Setup & Security

🔐 Be careful with sensitive information in custom fields

Bastien Siebman

A few months ago, I learned that there is a small “gap” in **#asana**’s security regarding custom fields: if someone can see a task, they can see all its custom fields, even if originating from a project they don’t have the rights to see!

Today, I learned that the situation is actually a bit more “secure”: users will only see values for custom fields within the library of the organization, and not custom fields restrained at the project level. So if you want to store sensitive information, make sure to not include the field in the organization library.

Be careful!

[Link to this tip’s discussion thread in the Asana Forum]

Admin, Setup & Security

💡 How to properly delete a team

Bastien Siebman

With Julien Renaud, we keep pushing the boundaries of our Asana knowledge and we stumbled upon the following topic: what to do before deleting a team?

First, you can remove all full-granted members and see if there are any Limited Access members left. That would mean there are private projects in the team you can't see. You need to ask them to move their projects first.

Then you can decide to move archived projects into an Archive team for safe-keeping. Be careful though: privacy should still apply and you don't want to reveal to everyone projects that were previously protected by the team permission settings.

[Link to this tip's discussion thread in the Asana Forum]

Admin, Setup & Security

A framework to evaluate Asana systems

Bastien Siebman

❓ I often have the opportunity to evaluate my client's Asana "systems" and share my insights: do I believe their system is good? Can it scale? Are they gonna hit roadblocks soon? Can I suggest something better?

For years, I based my judgment on my personal experience and my gut feeling. I never had the intention of formalizing that approach. But after all, that makes sense. If I could turn that gut feeling into a real framework to evaluate someone's system, then I would be able to give actionable feedback and compare systems!

(🇫🇷 version française disponible [Une grille d'évaluation des systèmes Asana])

What I am calling a system is the way a specific workflow is organized in Asana with projects, tasks, custom fields, tags, and best practices.

👨‍💻 My "biggest" system in Asana is to manage my client pipeline with opportunities and deals, as well as the actual work with them (sessions and tasks) and the billing. Do you decide to have one project per client or just tasks? Are invoices subtasks or actual tasks themselves? Are you able to see all the pending invoices or all clients you haven't talked to in a while?

📣 In my opinion, a system should be evaluated against 6 criteria: Balance, Search, Navigation, Export, History, Setup. The perfect system does not exist, but with these criteria, you can clearly decide.

⚖️ Balance

A system needs to be well balanced. Your projects need to be filled with tasks, not just one or two. If you are using subtasks, you shouldn't have to need too many of them on a single task. Also, the system should be able to scale and not produce data exponentially.

Components of an unbalanced system:

- projects with one or two tasks

- tasks with more than 20 subtasks
- a new project created very often without the possibility to archive it

🔎 Search

A good system allows you to search for information easily. You should be able to extract almost any piece of data only using the advanced search, like all the outdated invoices, all the prospects you are discussing with, all the tasks related to a client...

Components of an unsearchable system:

- information stored in task descriptions
- information stored in project or tasks names

🗺 Navigation

In a well-designed system, you can move around easily and navigate between entities with as few actions as possible. You should be able to search for a client and then go to their invoices, back to the client, dive into the history of your discussions...

Components of a system with difficult navigation:

- having to find a linked entity by running complex searches (like "search for invoices for which the custom field "Customer" is "...")

⤵️ Export

Not all businesses require that part, but a good system should allow you to export data in a structured way. That means being able to move your entire system content into a spreadsheet and run filters and sort. Usually, if a system is good with the Search part, it means it is underlyingly structured and the export will be easy to work with. Except for subtasks, that could be hard to work with once outside of Asana.

Components of an unexportable system:

- information stored in task descriptions
- information stored in project or tasks names
- several layers of subtasks

🕰 History

In a well-designed system, you should be able to go back in time and analyze data from the past. New information should not erase previous information. If you do regular events with the same partners, you should be able to access previous events for example.

Components of a system without history:

- recurring events are setup/discussed on top of previous events
- tasks are not part of any project and basically lost

📦 Setup

A good system should be easy to set up and maintain. Relying on complex multi-homing, or many steps that can't be automated is a no-go.

Components of a system not maintainable:

- a new entity requires several projects and tasks
- any task needs to be multi-homed into several projects, and forgetting one would be detrimental

---

Let's analyze my own system against this framework.

My prospects are represented as tasks in a dedicated project. Once they become a client, the task is moved to the project with all the other clients + I create a project for that client based on a template. The client task is multi-homed into its project and stays as the first task. Each client's project has a section for sessions I have with them and invoices. Sessions are also multi-homed into a session project, and invoices multi-homed into an Invoice project.

✅ **Balance**: one project per client is acceptable since I archive the project when my work with a client is done. My clients' projects hold much important information, and I barely use subtasks.

✅ **Search**: thanks to the split between several projects and the heavy use of custom fields, I can run complex searches.

✅ **Navigation**: from a client's task I can navigate to the client's project, then into the sessions or the invoices

✅ **Export**: I can export all my clients, all my invoices, all my sessions, easily

✅ **History**: each new session with a client is a new task, and the client's task holds comments about the history of discussions

🔶 **Setup**: creating a new client from a prospect requires a bit of work, but that takes a few seconds and that is acceptable given the number of clients.

Make sure to also read Larry Berger's post on balance Architectural Balance in Asana (Ebook Free Chapter).

Link to this tip's discussion thread in the Asana Forum

Admin, Setup & Security

How to Bar the Door (or, How to keep everyone with your company email domain from joining your Asana Organization)

Phil Seeman

Most people set up their Asana implementation as an Organization (as opposed to a Workspace), and for good reason - there are many benefits to an Organization over a Workspace.

One property of an Organization is that anyone who has an email address based on the email domain of the Organization can join that Organization without asking for or obtaining any sort of approval.

In some cases, this can be viewed as a good thing in terms of convenience and ease of onboarding. However, it's important to realize that in a paid-subscription Organization, the person joining will use up a license slot and thus becomes a user who must be paid for. As a result, people administering an Organization may want to have control over who in their company (i.e. who have an email address using the company domain) can and who cannot join their Asana instance.

The traditional answer often seen is, "You can't; anyone with the email domain can join!" However, there is a technique you can use, that Julien Renaud and I recently learned about, so as to have control over new users.

Here's how it works:

First, you set up the Asana Organization as a free Organization; i.e. it's not on any paid Asana plan.

Then you set up a Division within that free Organization where the Division is at the paid subscription level you want (Premium, Business, or Enterprise). Note that you need to have Asana Sales set up a Division for you; it's not something users can do on their own.

The key here is that by their nature, Divisions are closed to new users joining without being invited. People can only join a Team within a Division if they are specifically invited to join it; there is no automatic joining based on the email domain.

Note that this doesn't completely eliminate all possible issues; a Team member within the Division can still invite someone to the Team which might put the Division over their allocated number of licensed seats. But it's a much more manageable situation than the alternative.

This technique isn't something I've seen documented anywhere, but an Asana Sales rep should be able to set it up for you on request.

You can read about Divisions in the Asana Guide here, and you can learn more about the ins and outs of Divisions in this great forum post.

Link to this tip's discussion thread in the Asana Forum

Section 6: Integrations, 3rd Party & Ecosystem

Integrations, 3rd Party & Ecosystem

😩 Stop trying to connect Slack and Asana

Bastien Siebman

As an introduction, I'd like to start by saying that I equally love Slack and Asana. I believe they are game-changers compared to previous solutions (like email). I also believe things can go wrong if they aren't used properly. My personal position, which is quite controversial: do not connect Slack and Asana in any way!

Here are a couple of scenarios to illustrate my point.

✳️ « I want to be able to create tasks very quickly from Slack »

That's because you spend your day in Slack and have the app opened all day when you should spend your day in Asana and also have that app opened! And when you start allowing people to create tasks from Slack, you end up with half-baked tasks made only of a title, no description, no attachment, no comments. People will start to throw tasks at each other rather than collaborating.

✳️ « My boss doesn't want to go to Asana, he wants to get notified in Slack »

What your boss is basically saying is that it's ok not to use Asana. They are giving the wrong example and I would not be surprised if you have adoption problems because the leader does not show the right example! Slack is a glorified chat, not a work management tool.

✳️ « I want project updates to be posted to the project Slack channel »

Great, now you get the same notifications in Slack and Asana. And god forbid if you keep the Asana emails notifications on, you get them in Inbox and email. Stop the madness. Remove all notifications published to Slack, and teach people how to use Inbox! Otherwise, they'll be reading only one source of notifications, the ones from the shiny Slack, and you'll quickly find yourself with people not answering questions or doing work that is only published in Asana.

✳️ « People keep talking about tasks in Slack and they don't use Asana. »

What. A. Surprise. You did everything you could so that people could do their work from Slack and now you complain they don't go to Asana? You are slowly destroying the benefits of Asana: just like with emails, people are slowly going back to discussions mixing several topics, assigning tasks just by telling someone to do something, information gets lost, and clarity is thrown out of the window.

So, what should you do?

1️⃣ Make the rules clear: Asana is for work around specific tasks. Slack is for both informal chat and higher-level discussions. Notifications about tasks are to be read from Asana, specifically from the Inbox.

2️⃣ Put together a fun but strict Slack police force: they will be responsible for enforcing, in a nice and fun way, the rules above. When people say « could you do this? » in Slack, they will remind them to rephrase « could you do this? If yes, I'll assign you a task right away ». When someone asks « what's the status of project ABC or task XYZ » they will gently remind them that they need to do that extra effort to check it out themselves in Asana rather than expecting others to summarize for them.

3️⃣ Remind everyone that we don't throw half-baked tasks at each other. A name is not a task. A task is made of a name, a description, a due date, and often a nice comment along with it.

Conclusion: moving away from Slack is haaaaaaaaard. So hard. But it is worth it. Why do we like Slack so much? For me, 2 reasons: it is shiny (with colors and emojis) and it is instantaneous. Bring the shiny in Asana by using emojis and colors (properly). And stop believing everything needs to happen instantly: adopt a slower pace with Asana…

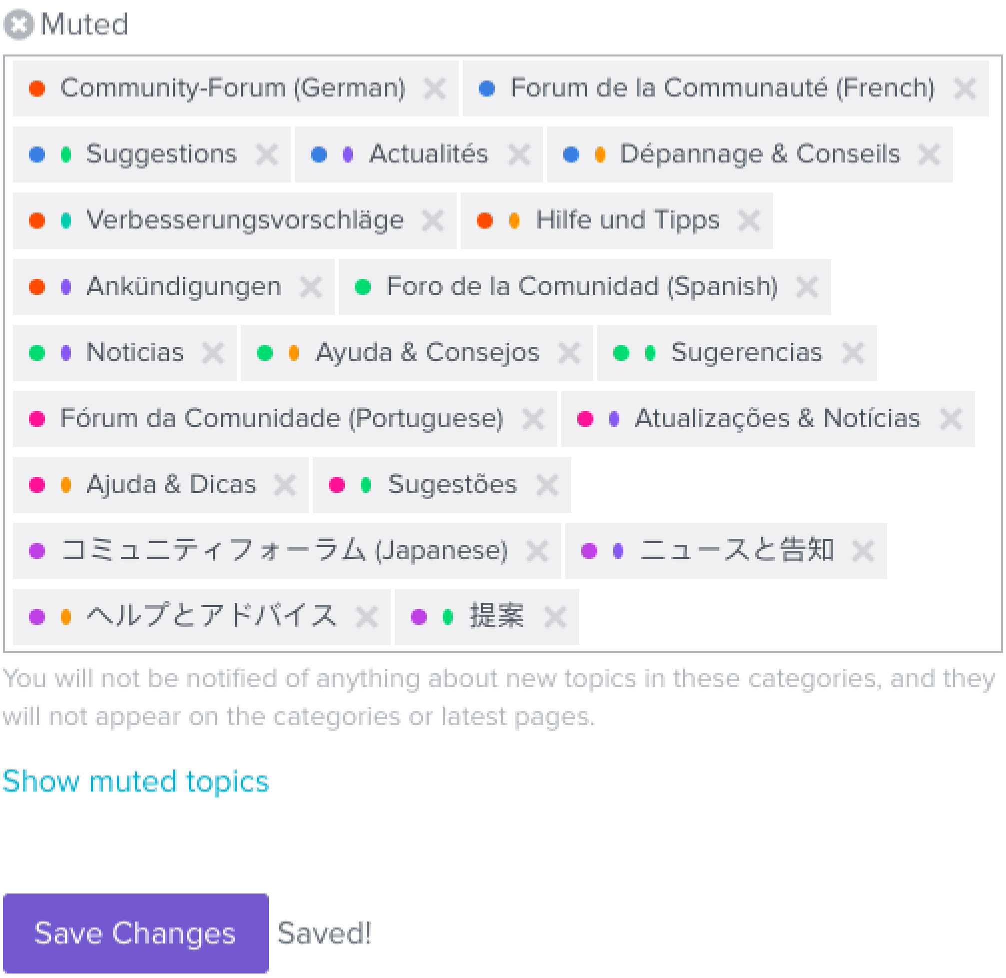
[Link to this tip's discussion thread in the Asana Forum]()

Integrations, 3rd Party & Ecosystem

Muting Forum Posts in Foreign Language Categories

Larry Berger

If you'd like to stop seeing posts in languages you don't speak, I think you can do so here in the Forum by clicking your avatar > settings icon > Categories > Muted and adding categories to exclude. Mine now looks like this:



Don't forget to click Save Changes.

[Link to this tip's discussion thread in the Asana Forum]()

Integrations, 3rd Party & Ecosystem

Visit Asana Events to discover a Workshop taking place near you!!!

Jerod Hillard

This isn’t so much feedback as it is an announcement! I highly suggest both new and experienced users with Asana seek out where the Asana Together World Tour (ATWT) might be showing up in a city near you. I was fortunate enough to join the Dallas TX sessions and absolutely loved it! It was such an awesome experience where you get to hear from a cast of Asana rockstars while networking with other adopters of the tool. Hats off to the team and best of luck to them in their next session near you!

Attend Asana events

Want to attend our events on and offline? Check out this events page to register for trainings, meet-ups, webinars, and more.

Link to this tip’s discussion thread in the Asana Forum

Integrations, 3rd Party & Ecosystem

Managing Bookmarks in the Asana Forum

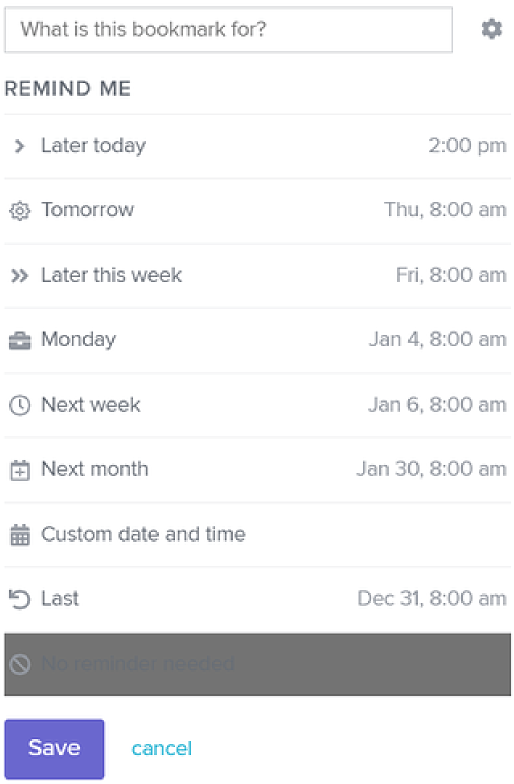
Jerod Hillard

You are a new user of Asana. You have questions. You come to the Forum to ask a general question or seek some guidance. While you wait, you start to look around. You soon realize the wealth of knowledge and support at your disposal. You decide you should spend some time in this space to help gather the tools necessary to become an expert like Bastien the Great.

While the Forum can't make you as good-looking as Julien, it can be a great reference. One problem… there is almost too much traffic to keep up with (*this is a great problem to have btw*) What to do? Well… in this post I'll make a simple suggestion of how you can manage things throughout the Forum that you might want to save for a later time. Let's look at Bookmarks.

Bookmarks can be accessed from the header menu when you click on your profile icon in the top right of the window. You can also access Bookmarks specific to a category after navigating to the desired category. That's great and all, but… **how do you differentiate your bookmarks if there are different purposes for why you chose to save each?**

When adding a bookmark (or if you click on the "3 dots" to the right of each bookmark when viewing from your profile activity you can edit them) you will see the following options:



My tip would be to take advantage of the "What is this bookmark for" and reminder fields. A sample scheme for how to label reminders might be:

1. Future Follow-up (typically next month)
2. Plan to respond (typically later this week)
3. Review and comment (typically next week)
4. Saved Reference (never delete the bookmark)

You can obviously call them whatever you want and set different types of reminders for each, but with a fallback system in place, it might help you manage all the great information that flows throughout the forum. I do this because there are certain things I want to bookmark forever like 🔥 [Hottest feature requests and their workarounds]. While there are also ones that I might not have time to respond to on the spot and I want to dedicate more time to review and comment like [Flowsana: workflow automation for your Asana projects - #83 by Phil_Seeman]. Once you have a system in place, you could even use the browser search to "filter" to the type you have time to address when reviewing them. 😉

Being fans of Asana, we like structure. Why not add a little structure to how to contribute and engage in the Forum? You're probably saying to yourself, "*Get with the program! We all do this, duh!*" If not, hopefully this very simple tip relieves a little stress for Forum Leaders and general contributors alike!

[Link to this tip's discussion thread in the Asana Forum]

Integrations, 3rd Party & Ecosystem

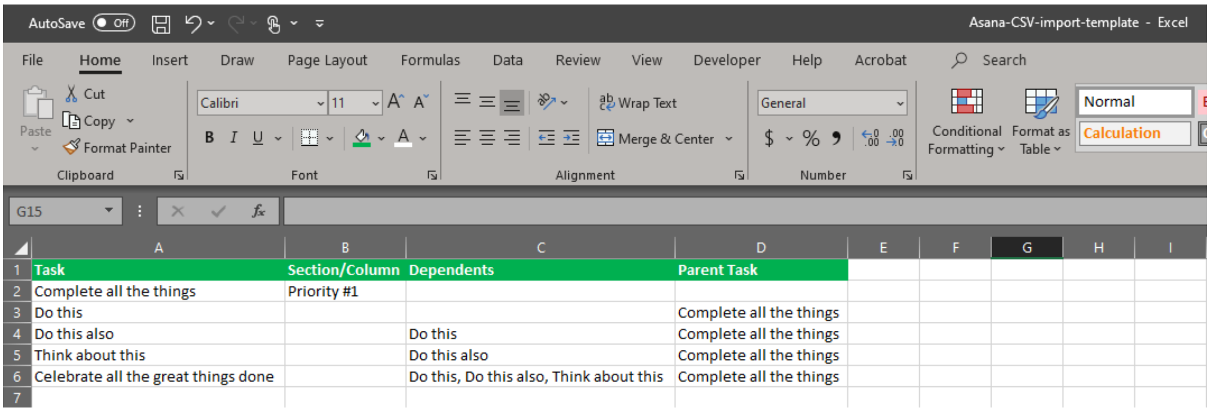
🔑 3 Key Reminders when using the CSV Importer

Jerod Hillard

There are several avenues to take when looking to enter data into Asana in a structured, consistent manner. Two great features to accomplish this are 1) Custom Templates and 2) Forms 1. Another great way to achieve the same would be to use the CSV Importer. [my personal favorite! 😉]

When using the CSV Importer here are 3 key things to keep in mind to ensure a successful import of your data.

1. Because subtasks require that you list a parent task in the “subtask of” column, you’ll need to keep the “section/column” column empty. If you list a section/column for a task that is intended to be a subtask, the “section/column” designation will take precedence and the task will be imported as a parent task.
2. Parent tasks have to be listed ABOVE subtasks. Just as the “blocked by” dependencies have to be listed ABOVE “blocking” tasks. This is outlined in the Asana Guide HERE and HERE,
3. You can list multiple dependencies in the “Dependents” column by separating the names of the tasks that are “blocked by” with a comma - as seen in the sample below:



Task	Section/Column	Dependents	Parent Task
Complete all the things	Priority #1		
Do this			Complete all the things
Do this also		Do this	Complete all the things
Think about this		Do this also	Complete all the things
Celebrate all the great things done		Do this, Do this also, Think about this	Complete all the things

Link to this tip’s discussion thread in the Asana Forum

Integrations, 3rd Party & Ecosystem

Hotline for Asana: Get immediate help from a Certified Pro 🎉

Larry Berger

Are you new to Asana? Trying to wrap your head around an Asana feature or complex workflow? Stuck? Don't want to dig through Forum posts or wait for an answer? Wondering how a seasoned expert would do it?

Now there is a Hotline for Asana. This new service will give you immediate access to an Asana Certified Pro for a screen share, chat, or video call.

Larry Berger (**@lpb**), Asana Consultant at Trilogi Solutions, has answered hundreds of questions in this Forum and has nearly ten years of Asana experience. Larry is also the creator of the popular Asana2Go.

You'd be surprised to discover just how much progress you can make in a brief screen share with an expert. The introductory rate is $50US for 20 minutes.

PS: No direct affiliation with Asana.

Link to this tip's discussion thread in the Asana Forum

Integrations, 3rd Party & Ecosystem

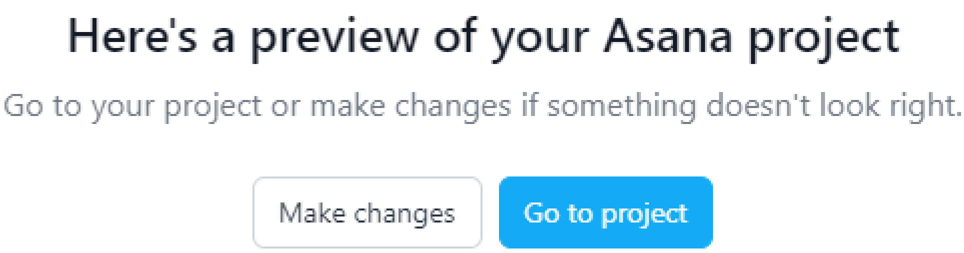
SAVE TIME by matching columns in a CSV import file to existing Custom Field Names (and the secret to emojis)

Jerod Hillard

This is a tale of where Bastien Siebman's beloved ideograms traded in their playful ways to punish the innocent! 😆

I'm sharing this tip because it got the best of me and required a bit of cleanup to undo the emoji mischief. The moral of this story is: **If you are an avid user of the [Asana CSV Importer], be sure that when adding emojis to the name of a Custom Field you UPDATE YOUR IMPORT TEMPLATE!**

Personally, I like to **make sure that the names of the columns in my CSV import file match the names of existing Custom Fields within the Project I am importing data to**. For one, Asana does a great job of making sure the data is mapped to the correct field when doing so. This allows me to "Go to project" and not have to "Make Changes" (*as seen below*) allowing for the import process to begin right away. This can be quite rewarding when you repeatedly import project information using a standard file template.



In instances where the preview doesn't seem correct and changes need to be made, having matching column names makes it easier for users to pinpoint any issues and correct them accordingly.

Recently, I decided that I wanted to add an emoji to the beginning of two distinct Custom Fields to help differentiate between them. One represents a Box-Link (web address) where the other is a Box Path (Windows File Path). Well... because I added an emoji to each, Asana didn't associate the columns with these recently modified Custom Fields. Because changes were not made, new non-global Custom Fields were added to this Project (*as seen below*)

	🔗 Box Link	📂 Box Path	Box Path	Box Link
			Box\Project...	https://sch...
			Box\Project...	https://sch...
			Box\Project...	https://sch...

So now what? Emojis are so fun though! Have no fear. Simply copy the emoji into your CSV import template and Asana will get back to associating the columns that match existing Custom Field names (*as seen below)*

S	T
📂 Box Path	🔗 Box Link
Box\Projects_ES	Box\Projects_ES
Box\Projects_ES	Box\Projects_ES
Box\Projects_ES	Box\Projects_ES

I know this is a minor detail, but perhaps one worth creating some awareness around. Especially for those that rely heavily on the CSV importer, like me. It is easy to get complacent when you are doing something often enough that you have built blind confidence in the process. **Pay attention to the details and audit your processes on occasion** to intercept long-term damages that tweaks like this could cause.

Asana on, my friends! 🙂

[Link to this tip's discussion thread in the Asana Forum]

Integrations, 3rd Party & Ecosystem

Need to copy project(s) between workspaces? Use Ditto

Larry Berger

The best way to copy a project or set of projects between workspaces (or even within a workspace) is to use the third-party app Ditto developed and supported by Forum member Michael Houston:

> Ditto now in open beta - 'Kothar v2.0' Integrations
>
> "After many months, I'm finally ready to release the new version of the project copying tool generally known as 'Kothar'. I'm calling it Ditto. You can now access it at https://ditto.kothar.net Please let me know how you get on if you use it - I'd very much appreciate any feedback you may have on the new interface."

Be sure to read the detailed documentation at the Ditto website to learn exactly how your copy will be handled with respect to what is copied and what happens in specific cases, say regarding members or custom fields in one workspace but not another.

Asana offers Duplicate Project and export/import, but these only work one project at a time and are not nearly as flexible or complete as Ditto. Asana Support regularly recommends the use of Ditto.

Many of us are so appreciative of this great app that we have upgraded to Pro to support Ditto's development (it's a total bargain, low one-time fee).

PS No financial interest; just a happy, long-term customer.

Link to this tip's discussion thread in the Asana Forum

Integrations, 3rd Party & Ecosystem

😍 My latest super cool Zap to create real-time request information tasks from email readers

Bastien Siebman

I am sending a newsletter every month to a bunch of Asana users. After years of running a newsletter, I realized asking people to email you if they are interested in something you have to offer doesn't work well. They usually don't.

I also discovered that using an Asana Form is very efficient and they answer even more. My new Zap will probably allow me to go even one step further. I want my reader to only click a link to share their interest, and I want to receive their email address in a task assigned to me as a result.

Here is how to achieve such a thing in Zapier.

Step 1: create a new zap. The trigger is "Webhook", the event is "Catch Hook". Zapier will generate a link like https://hooks.zapier.com/hooks/catch/387337/oez4d5z. When testing your trigger, make sure to visit the following address: https://hooks.zapier.com/hooks/catch/387337/oez4d5z?email=siebmanb@gmail.com&question=myQuestion

Step 2: the action in Zapier is to create an Asana task. You'll be able to use the values *email* and *question* in the task title and/or notes.

Step 3: when sending your newsletter to readers or clients, include the above link and use your email client (like Mailjet or Mailchimp) to replace the email with the actual receiver address (usually involves writing something like [[EMAIL_ADDRESS]]).

Step 4: enjoy! Your readers only have to click the link, and you receive an Asana task knowing exactly who is interested and wants to be contacted.

Current issue: when visiting such an address, the user ends up on an ugly page displaying gibberish for a regular person. I'll have to find a way around that...

Link to this tip's discussion thread in the Asana Forum

Integrations, 3rd Party & Ecosystem

Instant Slide Presentations from your Asana tasks with Asana2Go

Larry Berger

Asana2Go, the multi-purpose tool to flexibly copy, export, and print from Asana, now creates and delivers rich slide presentations from your Asana tasks. Turn your Asana tasks into an attractive, interactive slideshow (or a nice PDF of your slides). There's even an integrated speaker notes facility.

To see it in action:

YouTube Screencast - Asana2Go: Slide Presentations with Asana

Or read about it here:

Medium Post - Asana2Go: Instant Slide Presentations from Asana

Being able to present Asana tasks as slides has been quite a game-changer. Recently I had a spare eight minutes before a client call and created an effective slideshow of a half-dozen slides that added great clarity vs. not having slides and trying to step through the points in Asana itself, or spending time in Keynote or Powerpoint creating a deck.

And this is just one kind of output that Asana2Go can produce. Novices can select from 20 different standard reports/outputs including various kinds of lists, tables, CSVs, etc. Experts can create their own custom output using the included authoring tool with data and language helpers and documentation.

Asana2Go is free for all private and most commercial use (see Asana2Go for details), but please consider supporting Asana2Go: https://www.buymeacoffee.com/asana2go

Link to this tip's discussion thread in the Asana Forum

Integrations, 3rd Party & Ecosystem

Friends don't let friends... Asana alone! (Make friends with a Developer)

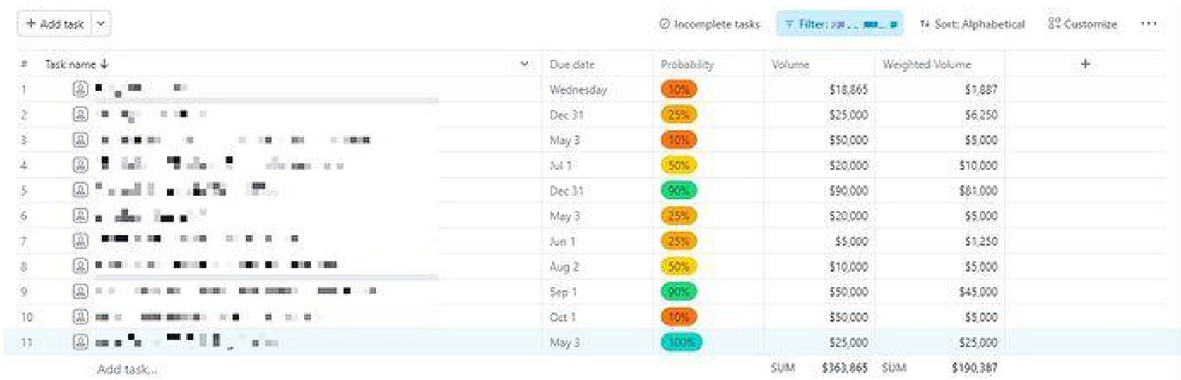
Jerod Hillard

We've all heard the saying "Friends don't let friends... [fill in the blank], right? With this quick tip, I just wanted to take a brief moment and **highlight the value of having a developer friend** because *"Friends don't let Friends Asana alone!"* #AsanaTogether 😉

I'm fortunate to have met a handful of them within the forum. I can confidently say that through these relationships I've widened both my perspective and use of Asana. If you haven't already, I would recommend that you reach out to one. Share your interests... talk about any recent successes... discuss pain points that you are experiencing... you might be surprised with what they have to offer and how easily they might be able to lift a burden!

Not to mention, it's cool 😎 to have a developer friend... and guess what?!?.. Bastien Siebman can be that friend! I mean... look what he did for me:

I subscribed to [his newsletter](#) where I learned he had a working solution to introduce auto computation within Asana. This is something I was handling through the [Google Sheet integration](#), but I wanted to be able to leverage the native Asana features like [Dashboards](#). I asked my friend if he could help and in no time (*which would have taken me the complete opposite of no time to set up and manage*) I had a fully functional solution!!!



As seen in the image above, my developer friend was able to build a tool that computes the Weighted Volume by multiplying the Probability field by the Volume Field. Because of this, I can now create [Custom Charts](#) and see [Section Totals](#) of these values without ever having to leave Asana!

[Link to this tip's discussion thread in the Asana Forum](#)

Integrations, 3rd Party & Ecosystem

Assistance with Asana for Nonprofits

Larry Berger

If you're a nonprofit using Asana, you are supported! Here are a few ways . . .

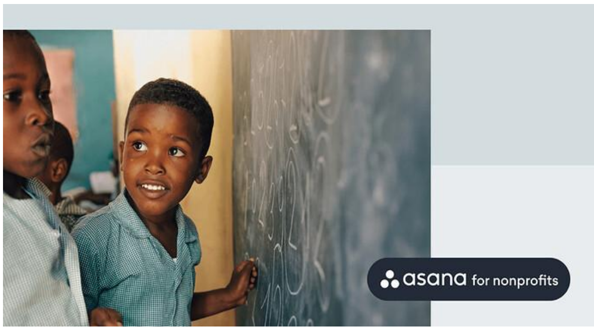
Free, virtual, recurring Asana AMA for nonprofits:

> Free, drop-in AMA for nonprofits most 1st and 3rd Wednesdays with Asana expert Larry Berger [Virtual] (Scroll to the bottom for latest announcements or find these directly at Upcoming Asana Events.)
>
> Most 1st and 3rd Wednesdays of the month, nonprofits can get any Asana-related questions answered for free during informal "Ask Me Anything" office hours with Asana Certified Pro and Forum Leader Larry Berger of Trilogi Solutions.

Ongoing offers of help (and some quick tips) from Asana Certified Pros. **Some of us (me included) offer pro bono or discounted consulting**:

> Welcome to the Asana for Nonprofits forum
>
> I'm kicking off this thread to welcome you and allow Asana Together members to introduce themselves. We're made up of Asana Certified Pros (consultants), Forum Champions (active here), and Ambassadors (go-to Asana experts for their teams). I'm one of the first Asana Certified Pros, I'm based in San Francisco but work with clients worldwide, I particularly enjoy working with nonprofits (I'm starting a new engagement with one tomorrow). and I offer discounted rates for nonprofits and do pro bono work...

Save 50% on Asana licenses via TechSoup:



Asana for Nonprofits Discount Program:

The Asana for Nonprofit Discount program supports qualified nonprofit organizations by offering subscription discounts and access to Asana work management software experts.

More info on the Asana nonprofit discount above:

Applying for the Asana nonprofit discount and need assistance?

If you have any questions about eligibility for the Asana Nonprofit Discount or require assistance applying for your discount code, please contact our client service partner in your country. To help in this process we've broken up our directory, for each service country, into the following two posts: For a list of country-specific support links for countries from A-H, click the following link. For a list of country-specific support links for countries from I-S, click the following link ...

Limited (one-hour only) pro bono consultations from Asana employees if you're an Asana for Nonprofits program member:

Asana Advisors

Asana helps marketing and creative teams scale, streamline, and automate processes and best practices to improve efficiency and spend more time doing skilled work.

Asana Forum category devoted to nonprofits:

Asana for Nonprofits

Nonprofits do a lot with only a little. Asana for Nonprofits can help you do more! Join the conversation to learn how.

More tips for nonprofits:

Asana Nonprofit Tips

Hey Nonprofit Fam! As a former board member and community leader in a few nonprofits, I was masterminding (with myself - LOL) on the top 3 projects that a nonprofit needs. a) Meeting Management b) Marketing and Campaigns c) Signature Program Thoughts and opinions?

Perhaps a few of these will prove helpful in supporting your efforts.

Link to this tip's discussion thread in the Asana Forum

Integrations, 3rd Party & Ecosystem

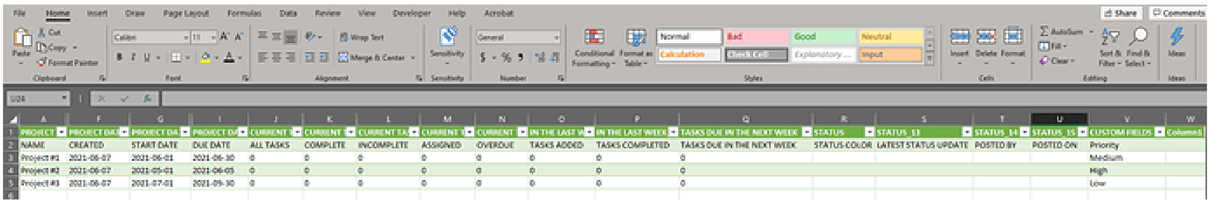
MS Excel Integration for Portfolios

Jerod Hillard

I'm a HUGE proponent of Google Sheets Integration. While Google Sheets is a fantastic tool that is top-notch when it comes to creating a collaborative workspace for many users, some prefer the good ole MS Excel experience...
... bummer... there isn't a Microsoft integration for tools like Excel...

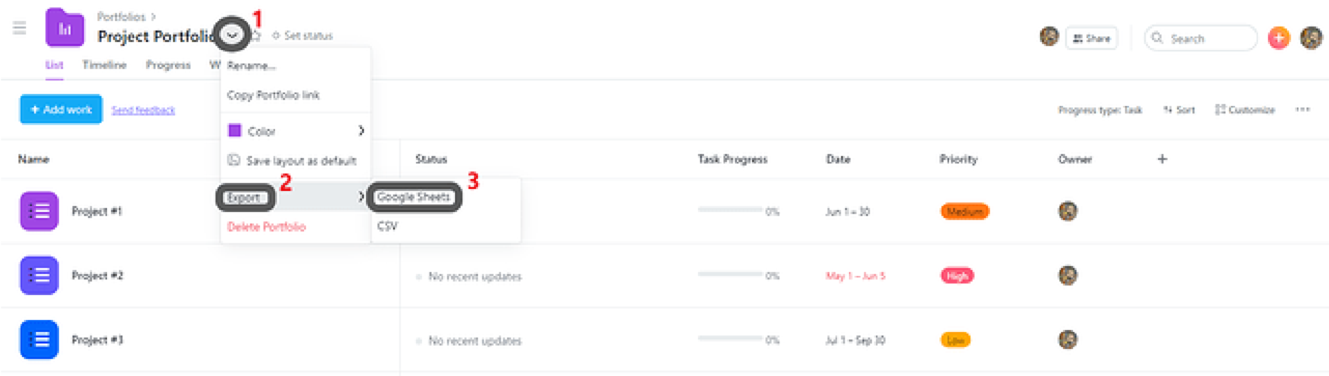
... but wait... there is! 😉

Did you know that you can dynamically link your Asana Portfolio to Microsoft Excel by creating a "From Web" data connection as shown below?



Here are the steps to produce this result above:

1. From the Portfolio Actions menu, you first need to **Export to Google Sheets**



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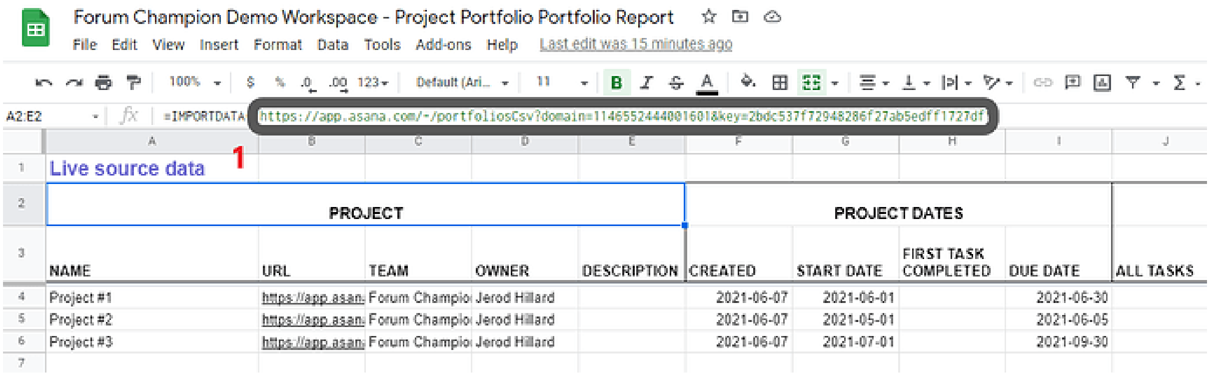
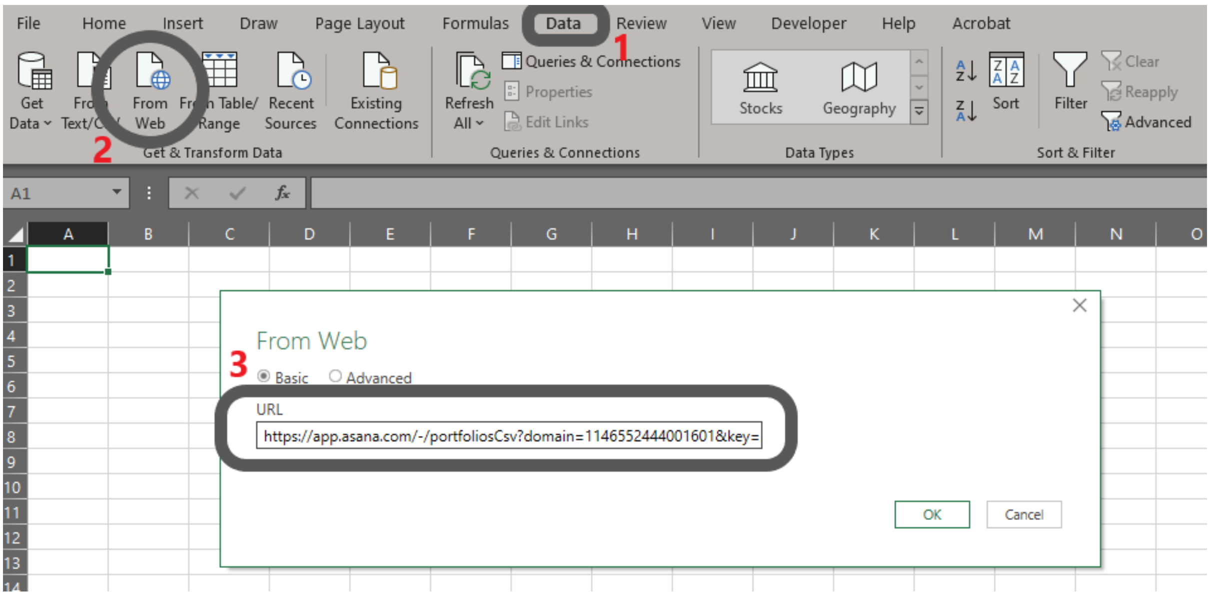
2. Once your Google Sheet is created, navigate to the 🔒 Live source data tab and **copy the full https address** within the IMPORTDATA () function of cell A2.

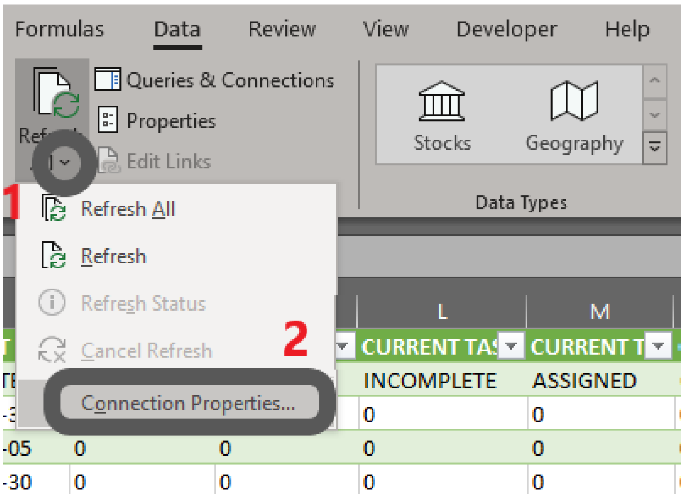


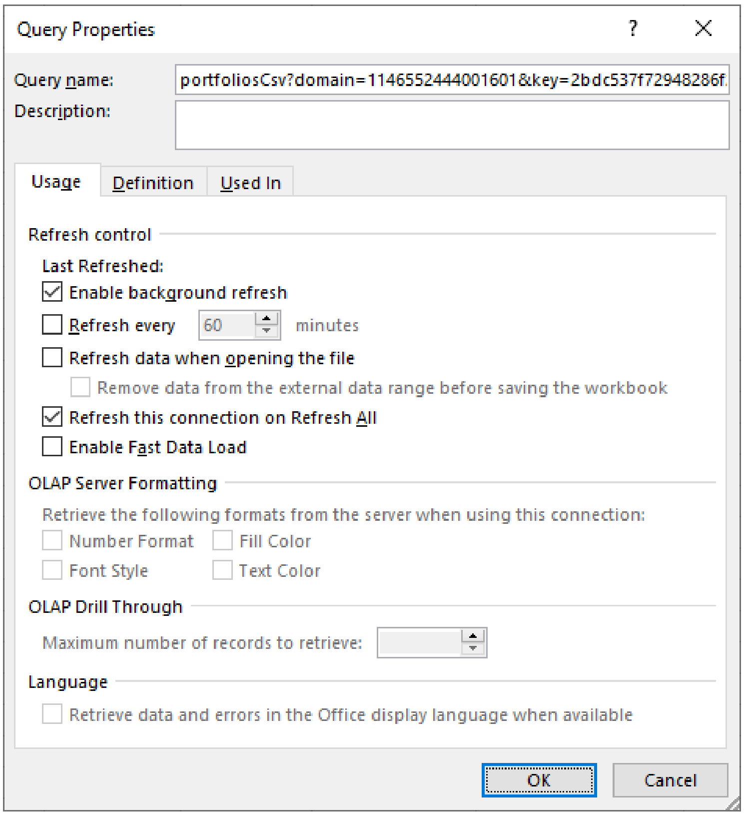
3. Navigate to the Data tab in the MS Excel Ribbon and choose "From Web" then **paste the URL** copied from the Google Sheet formula and click OK then Load from the next prompt.



4. Finally, you can **modify your Connection Properties** by selecting the dropdown arrow on the "Refresh All" button on the Data tab. Here you can

adjust how your connection refreshes, allowing for a more regular sync with Asana than the typical hourly sync with Google Sheets.





[Link to this tip's discussion thread in the Asana Forum]

Integrations, 3rd Party & Ecosystem

Create a hyperlink to an Asana Task through an MS Excel Integration

Jerod Hillard

This tip comes as a fast follow to one earlier this week: MS Excel Integration for Portfolios

If you connect Asana Project data to MS Excel, as described in the link above, you might uncover that a Task URL is not provided. No worries! if you know the Project ID then you can recreate this link using a function in Excel.

First, locate the Project ID from the web address within Asana. The format of the web address is as follows:

https://app.asana.com/0/1234567890123456/9876543210987654 where:

- 1234567890123456 represents the Project ID and
- 9876543210987654 represents the Task ID

Note the Project ID and place it in cell Z1 (as an example). Your first Task ID would be represented in cell A2. If this is the case your formula to generate an Asana Hyperlink for the task in row 2 would be:

=HYPERLINK("https://app.asana.com/0/"&$A2&"/"&$Z$1,"Asana Link")

You would then simply copy this formula vertically to generate a link for each line item (task)

Please Note: There is an extra step for your Task ID to show properly. Please see Obtaining the correct Task ID in MS Excel when connecting data from a Web Source for more details on how to correct this issue through a dynamic MS Excel integration.

Link to this tip’s discussion thread in the Asana Forum

Integrations, 3rd Party & Ecosystem

Obtaining the correct Task ID in MS Excel when connecting data from a Web Source

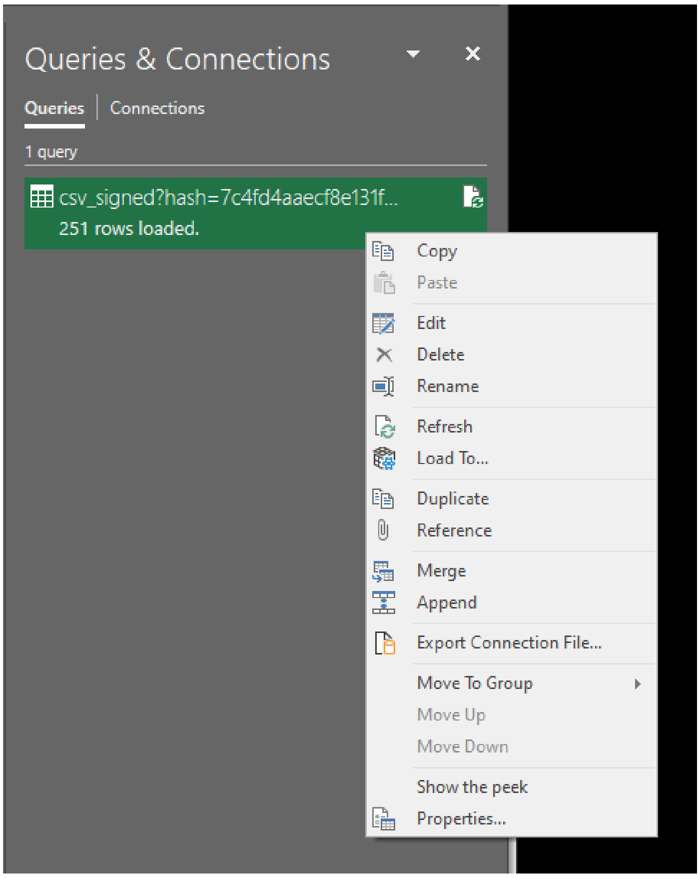
Jerod Hillard

This tip comes as a fast follow 🏃 to one earlier this week: [MS Excel Integration for Portfolios]

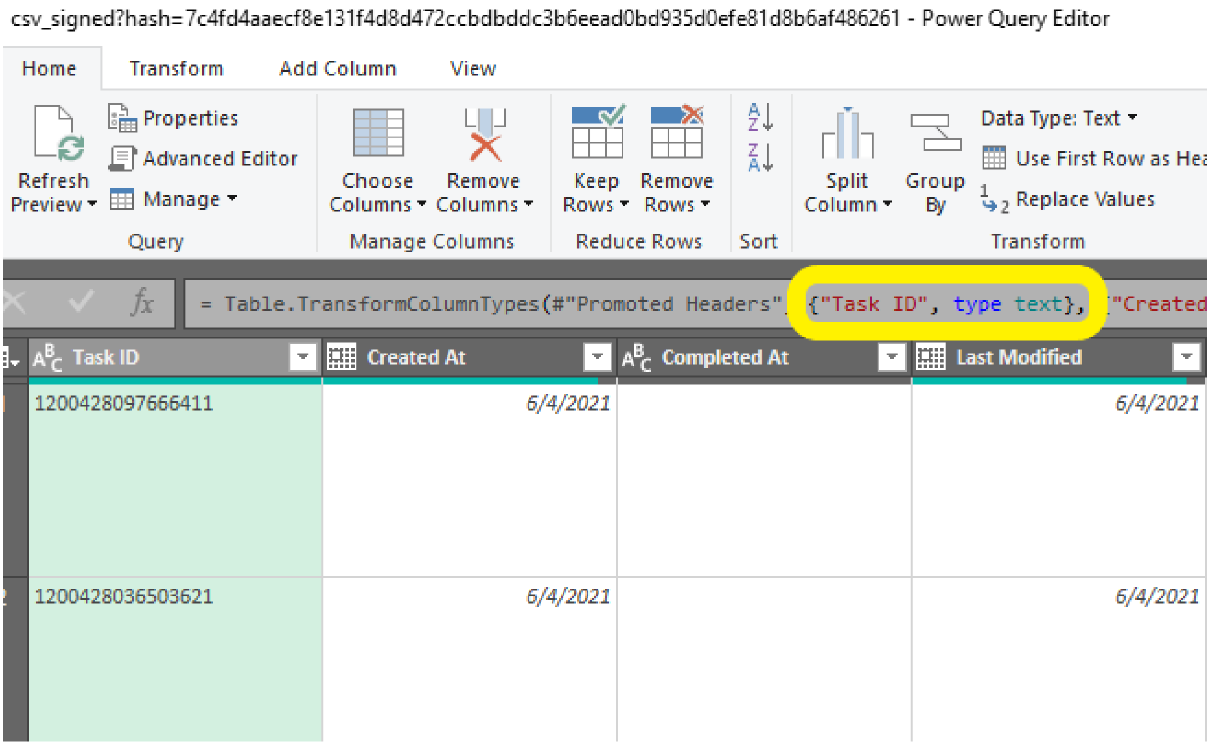
If you connect Asana Project data to MS Excel, as described in the link above, you might uncover the Task ID in column A doesn't show the full 16 character string. This is unfortunate if you are interested to use that ID to 🔗 [create a hyperlink to an Asana Task through an MS Excel Integration]

The good news is this can be fixed! 🎇 Once you have successfully connected your Asana data in MS Excel, **right-click on the query from the Queries & Connections pane** as shown below. **Select the "edit" option** which will open the Power Query Editor.

If this pane isn't shown initially you can view it by selecting "Data" (from the MS Ribbon) then "Queries & Connections"



Once the Power Query Editor has launched, change the portion of the table formula highlighted in yellow below to read as shown. This will convert the raw data from Asana for the Task ID so that it allows for all 16 characters to be shown.



Simply, “Close & Load” from the Power Query Editor and save it off your excel file.

Happy integrating!!! 😃

Please Note: To my knowledge, because the data is not being intercepted when viewing a raw CSV export, you run into an issue where the Task ID isn’t properly shown as pointed out in this post: Task ID in CSV exports only shows 15 of the 16 Task ID characters. Fortunately, Phil Seeman uncovered a fix which he outlines in this reply: Duplicating Tasks also duplicates the Task ID - #4 by Phil Seeman.

Link to this tip’s discussion thread in the Asana Forum

Conclusion

Larry Berger

Thank you for coming this far in your reading/skimming. We imagine that you may not have read every tip in full, but no worry; you won't find a pop quiz here.

We just hope you've derived some value from the tips you have read, and that you might later gain value from this collection as a helpful reference.

And perhaps the sum total here has given you an appreciation for the breadth and depth of Asana, the vibrancy and uniqueness of the Asana Community Forum among the available Asana educational resources, and the passion of its member-contributors.

The Asana community is an endless source of inspiration and we hope you'll consider posing your questions there, engaging in discussions about others', and maybe even contributing some tips of your own for us all to learn from.

San Francisco, July 21, 2021

Authors

[Forum profile]

Bastien Siebman

Asana is my secret tool. I am the co-founder of iDO, an Asana Solution Partner who helps clients all around the world, an Asana Ambassador, Forum Leader & event host, the Community #1 contributor, three-time Member of the Month, author of four books, and creator of many tools and services around Asana.

I love Asana and spend all day every day in it. I even organized my wedding with Asana! I've had the chance to help more than 150 clients, and have encountered many different use cases. Every day, I try to push the boundaries of the tool to serve my clients better.

I had the idea for this ebook after seeing all the great content our team of Forum Leaders was creating!

Forum profile

Larry Berger

Larry Berger of Trilogi Solutions is one of the first Asana Certified Pro Consultants, an Asana Forum Leader, an Asana Technology Partner, and is the creator of the versatile and popular Asana2Go app.

As one of the leading Asana Consultants worldwide, he has helped enterprise-level and startup organizations, and clients across many functional areas get the most out of Asana. He specializes in Asana usage, training, workflows, and API and has worked with Asana since 2012.

He is a long-time project and staff manager and independent interaction designer/information architect/usability expert/developer with over twenty years of enterprise/small business/freelance experience.

[Forum profile]

Jerod Hillard

Jerod is a productivity junkie. He is passionate about making the necessary evils in business as seamless as possible so more time can be spent doing work that matters. Jerod is an early adopter of Asana — serving today as an Asana Ambassador and Forum Leader within the ever-growing Asana Together community. He is always willing to help others make the most out of their Asana experience. Jerod specializes in applying his immense platform knowledge to advise how to best streamline complex workflows that result in a collaborative experience with a high level of user adoption.

Jerod has built a career and reputation with his employer, Schneider Electric, a global specialist in energy management and automation. It is here that he has been granted the distinct privilege to empower others to make the most of our energy and resources, bridging progress and sustainability for all. As a member of Client Services, he aims to serve as a digital partner for sustainability and efficiency through world-leading process and energy technologies.

Most importantly, he once used Asana in a sauna 🧖‍♂️

Forum profile

Phil Seeman

Phil Seeman is a veteran software developer and entrepreneur, having written software for various platforms since 1980. Phil specializes in writing software that integrates with and augments the functionality of existing software products. He has successfully done this with many applications, including NetManage Ecco Pro (his Catalyst Innovations software line), Microsoft Outlook and Exchange (his TeamScope Software products), and Evernote (his TuskTools add-ons).

Most recently, his focus has been on Asana with Flowsana, one of the leading Asana integrations which provides a set of workflow automations that enhance the capabilities of Asana. Phil is also an Asana Community Forum Leader and Asana Certified Pro.

[Forum profile](#)

Andrea Mayer

Andrea Mayer is an Asana wizard/freak, qualified primary school teacher and a language master who is fluent in her native German and English. She absolutely loves working in teams and helping others thrive in both their professional and personal lives. She believes that the key to success is igniting the spark to show everybody their highest potential. With vast experience in team building, project coordination, hiring, customer service and more, Andrea strives to be the most reliable, diligent and hard-working person no matter how small or big the task ahead of her is. There's no "I" in team, but there's "E" for everyone!

[Forum profile]

Rashad Issa

Rashad is a NED, strategy specialist and an operational quality, governance & assurance expert. He guides the development and delivery of robust operational strategies for ambitious, growing businesses. He is a Fellow of the Chartered Quality Institute and sits on the Board of Trustees, as well as a Board member of the Project Management Institute UK.

Leveraging deep experience in establishing project management offices from the ground up to credibly advise on governance frameworks; directing the end-to-end build of diverse quality management systems to ensure accreditation; and helping businesses streamline complex policies and procedures on a global scale. Keen on increasing efficiency and eliminating operational waste, Rashad is an asana forum leader, being one of the first piloting the platform when it launched over 4 years ago to support users with use cases and tips. Rashad manages the deployment of Asana in organizations he works with and sees a 100% increase in platform adoption year on year.

He is also passionate about history and regularly volunteers for the Historic Royal Palaces.

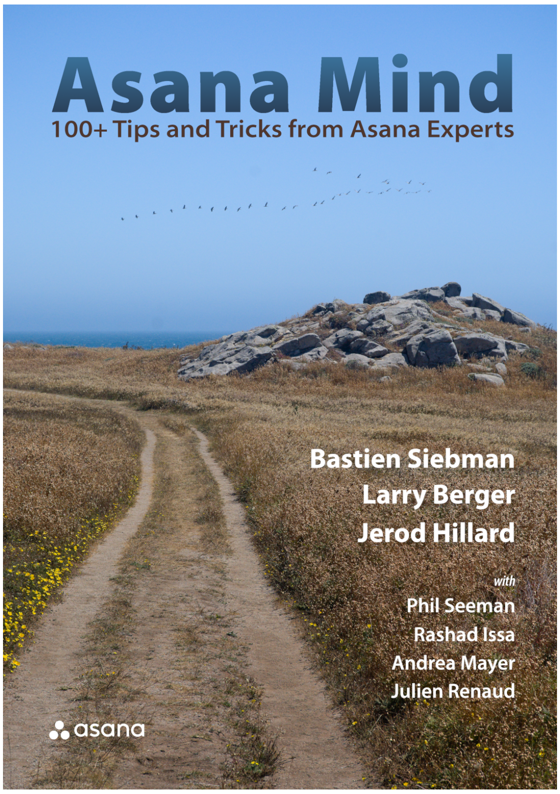
[Forum profile]

Julien Renaud

Julien has 14 years of team and project management in several companies and was one of the very first to join the list of experts officially recognized by Asana (Asana Forum Leader and Asana Certified Pro).

He has managed the entire deployment of Asana in his company (from 1 to 200 licenses), across different departments and in several countries. Several years of daily coaching with Asana users has allowed him to build knowledge of Asana (training, communication, change management, ...) for a wide range of uses.

He discovered Asana a few years ago and he is now an Asana consultant 100% of the time by being a co-founder of the iDO Asana Solution Partner company: what an adventure!



About the Cover

We have designer, developer, photographer Trav Stone to thank for both the cover design and photograph.

His concept evokes the book's intent by showing a path forward, avoidance of obstacles, and Zen Mind / Beginner's Mind / Asana Mind in nature. Not to mention the highly collaborative flock overhead.

Acknowledgments

Thanks to:

- Larry, Phil, Julien, Jerod, Rashad, Andrea for being amazing partners to work with
- Asana for creating such an amazing tool
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- Marie, Emily and Rebecca at Asana for their daily support and help
- Trav for putting together the cover
- Laura for her motivation and energy in creating the ebook