

# Asana - Fundamentals

## Asana Documentation

### Getting Started With Asana

We highly encourage you to go through the [Basic Course Series](#) (1 hour commitment) in order to get a guided tour of the main features of Asana.

## Asana Guide

The [Asana Guide](#) is very well written and comprehensive. This is the #1 resource you should use to explore functionalities further.

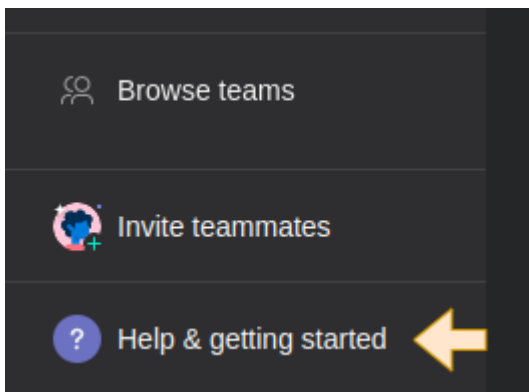
## How To Asana

Many resources are also available on Youtube. We recommend looking at the [How To Asana](#) series to short and practical videos.

⚠ Some videos can be a few years old. Although still relevant there might be other / better ways to do things in Asana (Ex: The time tracking video shows the Harvest integration. There's now a built-in time tracking feature.).

## Inline Help

You can access the documentation within Asana itself by clicking the "Help and getting started" link at the bottom left of the screen.



# Golden Rule

If you need to remember one thing, remember this:

A task is only considered actionable if it is **assigned to someone** and **has a due date**.

## Important Concepts

### Asana Organization

All users that have an @akvo.org email address are part of the Akvo Asana Organization.

### Asana Teams

An Asana Team is a set of people that share projects. Think of Asana Teams as a way to group projects that are related to each other. Ex:

- Internal Asana Project for an internal team
- Asana Projects used to implement a client project / contract

Teams have different permission settings that control how people can find and join teams (projects have their own permissions).

Privacy Setting	Accessible by	Can request to join
Membership by Request	Team members	Yes

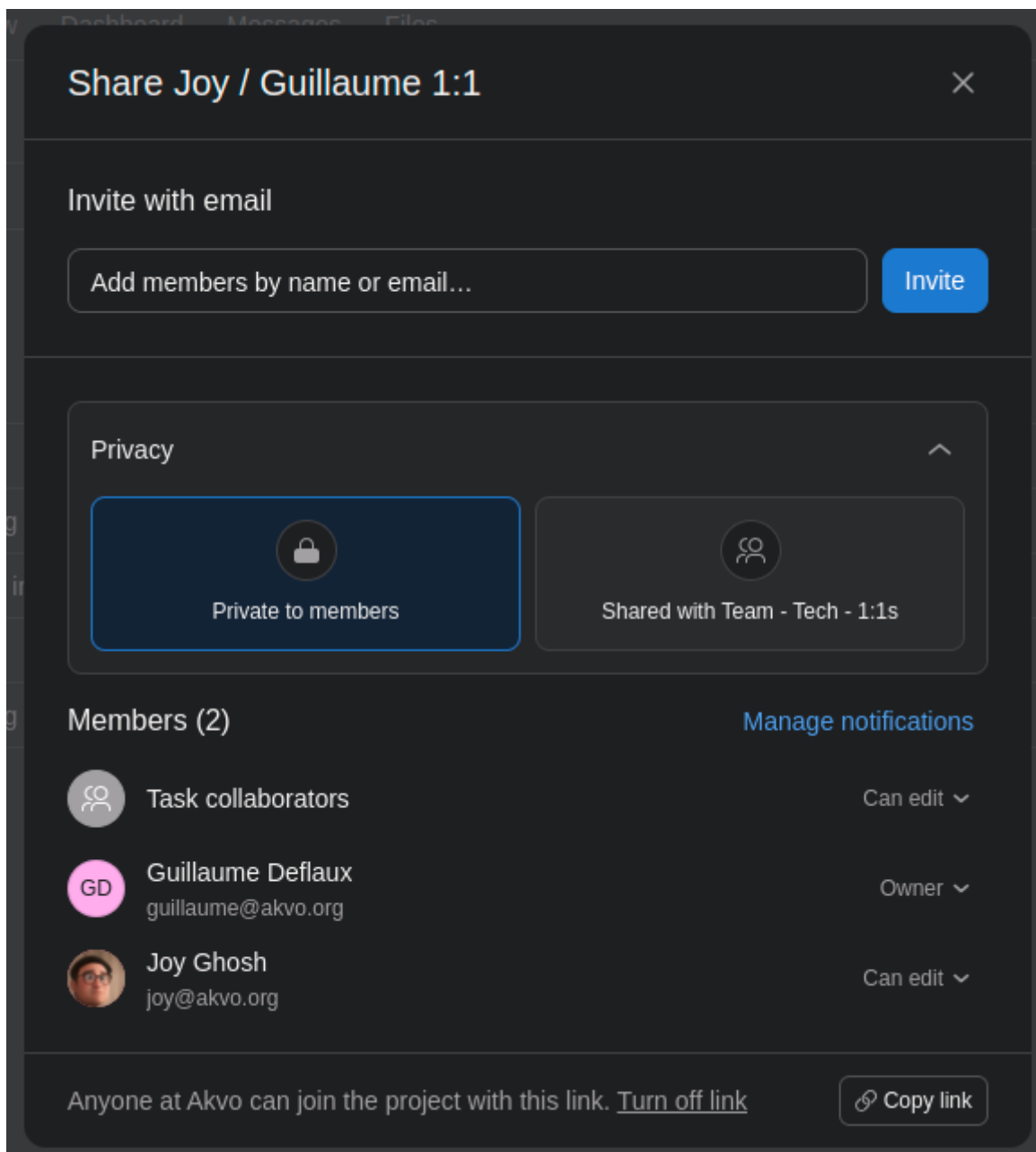
Privacy Setting	Accessible by	Can request to join
Private	Team members	No
Public to organization	Team and organization members	Yes

At Akvo, Asana Teams should have the permission "Public to organization" by default.

# Asana Projects

An Asana Project is where you organize the tasks.

Make sure to share your project with the right people by clicking on the Share button (top-right corner). By default projects are shared with members of the Asana Team. You can change that as needed (similar to Google Drive documents).



## Useful Features

Feature	Description
Invite Clients To Asana	<p>You invite clients to Asana. This is a great way to create transparency and to have them engage with the project. Client usually have access to the Timeline and Feedback projects. You can add share other Asana Projects with them depending on their role and level of engagement.</p> <p>☐ As long as their email address is not @akvo.org their account does not count towards our Asana seat count.</p>

Feature	Description
Tasks can be in multiple projects	You can add tasks to multiple projects at the same time. This is very useful to avoid duplication. Ex: A task is added to the Feedback project by the client. You add that task to the Sprint Project as well so that the work of the team is in a central location.
<u>Repeat / Recurring Tasks</u>	Repeat tasks get created again when they are completed. This is useful to remind you to do something at periodically. Ex: submit your expenses every month.
<u>Timeline View &amp; Dependencies</u>	The timeline view allows you to create Gantt charts. Timelines are a very convenient way to share project update with clients.
<u>My Tasks</u>	Everything that is assigned to you ordered in many different possible ways.
<u>Inbox</u>	Inbox is your notification center for Asana. Your inbox displays updates on projects you're a member of, and tasks that you collaborate on or that are assigned to you. It's a great way to stay on top of what has happened.
<u>Project Templates / Task Templates</u>	You can create templates for Projects and Tasks. Great for standardizing your workflows.
<u>Custom Fields</u>	Useful to customize your Asana workflow and to add sort / filtering capabilities. Make sure to check whether the custom field you want to add already exists in the Asana's field library.
<u>Rules &amp; Workflow Builder</u>	Rules allow you to streamline routine tasks and establish workflows with ease. For a rule to work, you need a trigger that activates the rule and an action that is performed automatically. For example, a rule can be created to automatically assign a task (action) when a due date is set (trigger). Workflows provide a nicer user interface to create and manage rules.
<u>Forms</u>	You can create forms to standardize the way tasks are created in an Asana Project. Forms have an external link that can be shared with anyone, even without an Asana account. Ex: Create a form to collect bug reports.
<u>Proofing</u>	Proofing lets stakeholders leave specific, actionable feedback on images so your team knows what needs to be done to complete their work.

Feature	Description
<u>Approvals</u>	<p>Approval tasks are tasks for which the "Completed" boolean attribute is replaced by:</p> <ul style="list-style-type: none"> <li>• Approved</li> <li>• Changes Requested</li> <li>• Rejected</li> </ul> <p>Useful when you need more than just a simple Yes or No.</p>
<u>App Integrations</u>	<p>Asana can be integrated with many other 3rd party tools. Here are some useful examples:</p> <ul style="list-style-type: none"> <li>• <u>Github</u></li> <li>• <u>Figma</u></li> <li>• <u>InVision</u></li> <li>• <u>Slack</u></li> <li>• <u>Google Drive</u></li> <li>• <u>TestLodge</u></li> <li>• <u>PowerBI</u></li> <li>• <u>Zoom</u></li> <li>• <u>Miro</u></li> <li>• <u>FreshDesk</u></li> </ul>
<u>API</u>	<p>For anything else that is not possible with an existing App Integration, you can still rely on Asana's API. Great combo with automation tools such as <u>n8n</u>.</p>

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