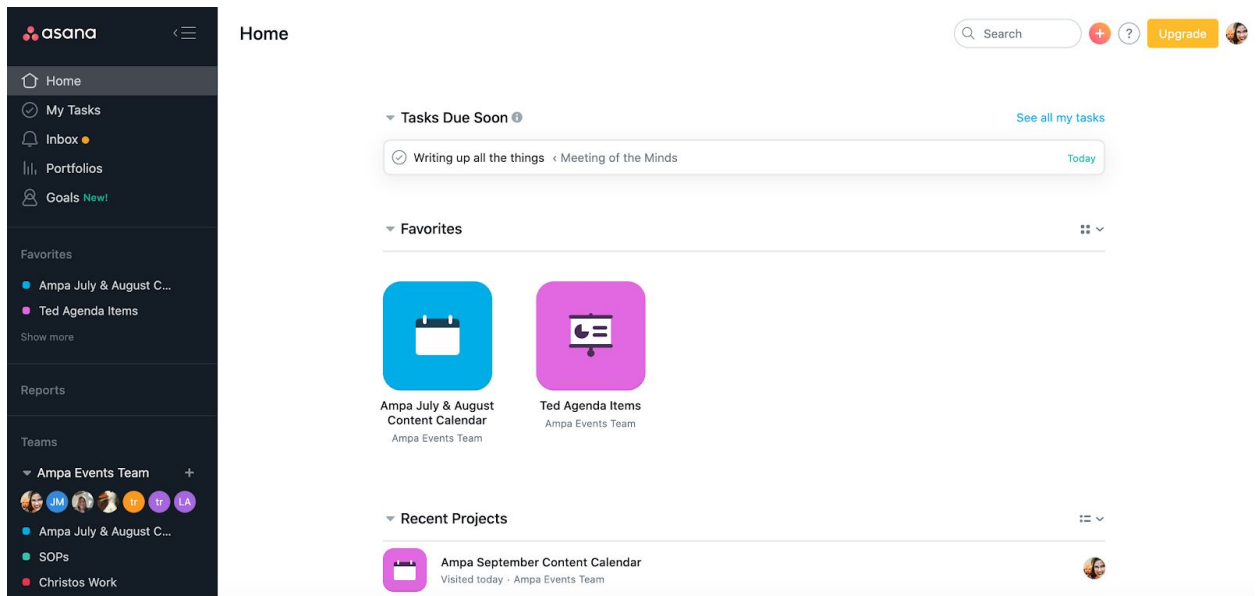




How to Use Asana

How To Navigate in Asana

1. Log into Asana <https://asana.com/>
2. This is the Asana Home Screen - you can get back to this screen any time by clicking on “Home” in the left sidebar. The home screen shows you what tasks you have due soon, your favorite projects, and all your recent projects.



3. The next page is “My Tasks” . This screen shows you all the tasks that are assigned to you and their due dates (if applicable). This is basically your running to-do list if you want



to see just your tasks and not the full projects they might be assigned to.

Donna's Tasks - ampaevents.com

Search [] + ? Upgr

1 task completed today Incomplete tasks 14 S

+ Add task

Recently assigned

- Blog needs to be scheduled out to post on Monday Sept. 7th < Fall Outdoor Movie Packages Sep 4
- Blog needs to be scheduled out to post on Monday Sept. 7th < Custom Fabrication: Beach Wedding Boat Sep 11
- Blog needs to be scheduled out to post on social media on Monday Sept. 7th < Fall Outdoor Movie Packages Sep 4
- Blog needs to be scheduled out to post on social media on Monday Sept. 7th < Custom Fabrication: Beach Wedding Boat Sep 11
- Post all links in Asana & complete task < Fall Outdoor Movie Packages Sep 7
- Post all links in Asana & complete task < Custom Fabrication: Beach Wedding Boat Sep 14
- Blog needs to be added to website < Fall Outdoor Movie Packages Sep 2
- Blog needs to be added to website < Custom Fabrication: Beach Wedding Boat Sep 9
- Fall Outdoor Movie Packages Ampa Se... Sep 7
- Custom Fabrication: Beach Wedding Boat Ampa Se... Sep 14

4. Next is your "Inbox" - think of this as your newsfeed of Asana. This is where you can see all the interactions on your tasks

Inbox [Send feedback](#)

Activity Archive

Search [] + ? Upgrade

Expand All Assigned to me @Mentioned Assigned by me ...

Today

- Ampa July & August Content Calendar
- How To Use Pillows in Your Wedding Decor
- Kristen Altermatt liked your appreciation. 5 hours ago
- Ampa Events Site Changes > Meeting of the Minds Due today
- Writing up all the things
- You have a task due Today. Today at 12:41am
- Ampa Events Site Changes
- Meeting of the Minds
- You have a task due Today. Today at 12:41am

Past 7 Days

How To Use Pillows in Your Wedding Decor ...




image.png · Download

Donna VanGlad 12 days ago

Blog published and can be viewed here: <https://ampaevents.com/how-to-use-pillows-in-your-wedding-decor/>

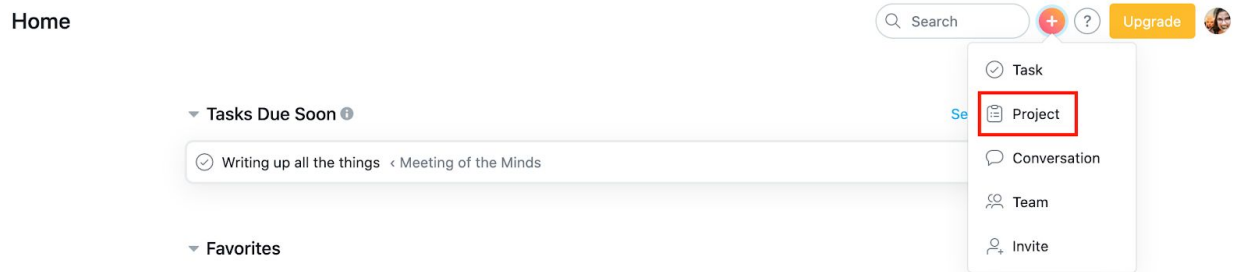
Ask a question or post an update...



5. Portfolios and Goals are not applicable to us - those are both premium features that we don't have access to.

Creating a Project

1. Log into Asana <https://asana.com/>
2. Click on the plus sign next to the search bar to create a new project



3. Or scroll down to the bottom of the "home" page and click on "New Project"





4. Choose your project Type - For this example we're going to use Asana's built in Content Calendar template and edit it for our needs

Choose a project template



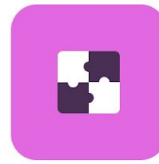
Blank Project



Standup Meeting



Creative Requests



Agency Collaboration



Asana Basics Training

General templates

By ampaevents.com

Type: Marketing



Import spreadsheet

Import data from a CSV file



Agency Collaboration

List layout



Campaign Management

List layout



Content Calendar

List layout

5. Click on Use Template



Content Calendar

Use template

Try our content marketing calendar template to track content ideas, see monthly schedules by channel, check task progress, and keep assets together.



- Since this is something that the whole team will need to use, just keep the default settings. Update the project name and then click on “Create Project”

Add project details

Template

- Content Calendar

Project name

Team

Privacy

- Public to Ampa Events Team team
- Private to project members [Upgrade to Premium](#)
- Private to me

- This is what the list view of the project will look like

Ampa September Content Calendar ▼ 🕒 ☆ ⊙ Set status 👤 Share 🔍 Search + ? Upgrade 👤

[List](#) [Board](#) [Timeline](#) [Calendar](#) [Progress](#) [Forms](#) [More...](#)

🕒 Incomplete tasks ≡ Filter ↕ Sort ⚙️ Rules 🧩 Apps 📄 Fields ⋮

| Task name | Assignee | Due date | + |
|--|----------|----------|---|
| ▼ (no section) | | | |
| ▶️ [READ ME] Instructions on how to use this template 7 🗨️ | | | |
| ▶️ [COPY ME] To add a new piece of content 9 🗨️ | | | |
| ▼ [Example Month] - January | | | |
| ▶️ [EXAMPLE TASK] New customer email series 11 🗨️ | | | |
| ▼ Article Ideas | | | |
| ▶️ [EXAMPLE IDEA] Blog about finding relevant influencers? | | | |
| ▼ Reference | | | |
| ▶️ [EXAMPLE TASK] Marketing style guide | | | |
| + Add section | | | |



How to Populate the Project

1. To Update a section just click on the section title and then type directly into it

A screenshot of a project interface. At the top, there is a section title "[Example Month] - January" with a dropdown arrow on the left and a "+ ..." icon on the right. Below this, a task is listed: "[EXAMPLE TASK] New customer email series" with a checkmark icon on the left, the number "11", and a link icon on the right.

▼ September Content

2. To add a task - you can either hover near the end of the content title and then click on the + icon

A screenshot of the "September Content" section. The section title "September Content" has a dropdown arrow on the left and a "+ ..." icon on the right. A tooltip with the text "Add a task to this section" is positioned over the "+ ..." icon. Below the section title, a task "[EXAMPLE TASK] New customer email series" is visible, with a checkmark icon on the left, the number "11", and a link icon on the right.

3. Or click into a current task and then just hit "Enter" (which is hard to illustrate with a screenshot).

A screenshot of the "September Content" section. The section title "September Content" has a dropdown arrow on the left. Below it, the task "[EXAMPLE TASK] New customer email series" is highlighted with a light blue background. Below the highlighted task, there is a new input field for a task name, starting with a checkmark icon and the text "Write a task name".



4. Simply Title your task name and then click on the “Details” to open up the details box

▼ **September Content**

☑ **Fall Outdoor Movie Packages**

▼ **September Content**

☑ **Fall Outdoor Movie Packages** Details >

Task name

▼ (no section)

▶ ☑ [READ ME] Instructions on how to use this template 7 t3

▶ ☑ [COPY ME] To add a new piece of content 9 t3

▼ **September Content**

☑ **Fall Outdoor Movie Packages**

▼ **Article Ideas**

☑ [EXAMPLE IDEA] Blog about finding relevant influencers?

▼ **Reference**

☑ [EXAMPLE TASK] Marketing style guide

Fall Outdoor Movie Packages

Assignee Unassigned

Due date No due date

Projects ■ Ampa September Content Calendar September Content ▼

Description Add more detail to this task...

+ Add subtask


Donna VanGlad created this task. 3 minutes ago


Donna VanGlad added to [Ampa September Content Calendar](#). 3 minutes ago

5. The Details box is where you are going to add in the description of the task, create subtasks, and assign the deadlines. Each task can have one Assignee (basically the overseer of the task) and then each subtask can be assigned to different people with due dates. Here is an example of a completely filled out task



Fall Outdoor Movie Packages

Assignee  Donna VanGlad










Due date  Sep 7

Projects ■ Ampa September Content Calendar September Content ▾

Description

Blog about the Fall Outdoor movie packages.
Include things like "Fright Night" "Monster Movie Marathons" Halloween, etc.

Subtasks

- Blog needs to be written Aug 28 
- Images need to be found for the blog Sep 1 
- Blog needs to be added to website Sep 2 
- Blog needs to be approved Sep 3 
- Blog needs to be scheduled out to post on Monday Sept. 7th Sep 4 
- Blog needs to be scheduled out to post on social media on Monday Sept. 7th Sep 4   >
- Post all links in Asana & complete task Sep 7   >

6. You can leave comments on the task as a whole




0 people will be notified Comment

Or on the individual subtasks

- ☑ Blog needs to be written Aug 28 tr 🗨️
- ☑ Images need to be found for the blog
- ☑ Blog needs to be added to website

Subtask's notes and comments (Tab+→)
Sep 2 

Ampa September Content Calendar
[Fall Outdoor Movie Packages >](#)

Blog needs to be written


Assignee tr theodore rubis

Due date 📅 Aug 28

Description Add more detail to this task...

7. One you create on task, and you know that you're going to be doing several tasks that will be similar - you can just duplicate the task. Just right click on the task, and then click on duplicate task

▼ **September Content**

- ▶ ☑ Fall Outdoor Movie Packages 7 
- ▼ **Article Ideas**
 - ☑ [EXAMPLE IDEA] Blog about finding relevant influencers?
- ▼ **Reference**
 - ☑ [EXAMPLE TASK] Marketing style guide
- + Add section

- ☑ Mark complete
- 👁 View details
- ↶ ↗ Full screen
- 🔗 Open in new tab
- 🔗 Copy task link
- 📄 Duplicate task
- 🔄 Create follow-up task




8. You will then have the option to rename the task, and then choose exactly what you want duplicated - once you're happy with your selection then click "Create New Task"

Task Name

Custom Fabrication: Beach Wedding Boat

Include

- Task Description
- Assignee
- Subtasks
- Attachments
- Tags
- Collaborators
- Projects
- Due Date
- Dependencies 
- Parent Task

Create New Task

9. Click on the Task to see the details, update the description, and update the dates and you'll be all set!
10. If you want to see all the subtasks of a task without clicking into the full detailed description just click on the little black arrow to the left of the task name and it will open up.



▼ September Content

▶ Fall Outdoor Movie Packages 7

| Task | Assignee | Due Date |
|--|----------------|----------|
| ✓ Fall Outdoor Movie Packages 7 | Donna VanG... | Sep 7 |
| ✓ Blog needs to be written | theodore ru... | Aug 28 |
| ✓ Images need to be found for the blog | James Mee... | Sep 1 |
| ✓ Blog needs to be added to website | Donna VanG... | Sep 2 |
| ✓ Blog needs to be approved | theodore ru... | Sep 3 |
| ✓ Blog needs to be scheduled out to post on Monday Sept. 7th | Donna VanG... | Sep 4 |
| ✓ Blog needs to be scheduled out to post on social media on Monday Sept. 7th | Donna VanG... | Sep 4 |
| ✓ Post all links in Asana & complete task | Donna VanG... | Sep 7 |

11. Once you fully fill out the project the way you want it you can see how it looks in the other views.

a. Board (not super helpful for this type of project)

Created today Incomplete tasks Filter Sort Rule

September Content Content Ideas Reference

Fall Outdoor Movie Packages Sep 7 7

- ✓ Blog needs to be written Aug 28 tr
- ✓ Images need to be found Sep 1 JM
- ✓ Blog needs to be added to website Sep 2 tr
- ✓ Blog needs to be approved Sep 3 tr
- ✓ Blog needs to be scheduled out to post on Monday Sept. 7th Sep 4 tr
- ✓ Blog needs to be scheduled out to post on social media on Monday Sept. 7th Sep 4 tr
- ✓ Post all links in Asana & complete task Sep 7 tr

+ Add subtask

Content from other sources

Why Pumpkin Spice is the Best Spice

[EXAMPLE TASK] Marketing style guide



b. Calendar

Ampa September Content Calendar ▼ ⓘ ☆ ○ Set status Share Search

List Board Timeline **Calendar** Progress Forms More...

September 2020 ▼ Today Color: Default Weekends: Off

| Mon | Tue | Wed | Thu |
|-----|--|-----|-----|
| 6 | 7 | 8 | 9 |
| | Fall Outdoor Movie Packages 7 | | |
| 13 | 14 | 15 | 16 |
| | Custom Fabrication: Beach Wedding Boat 7 | | |

12. Once you have finished a task in Asana you can click on the checkmark to the left of the task to complete it

▼ **Content Ideas**

Content from other sources

Why Pumpkin Spice is the Best Spice

Mark task complete

13. Once you complete a task it will disappear from your view - but fear not! It's not gone forever! Just change your view at the top(ish) right from "Incomplete Tasks" to "All Tasks" and you'll see your completed task grayed out with a green checkmark.



Ampa September Content Calendar

▼ ⓘ ☆ ○ Set status



Share

List Board Timeline Calendar Progress Forms More...

+ Add task ▼

Task name

▼ September Content

⋮ ▼ September Content

▶ (✓) Fall Outdoor Movie Packages 7 🗒

▶ (✓) Custom Fabrication: Beach Wedding Boat 7 🗒

▼ Content Ideas

(✓) Content from other sources

(✓) Why Pumpkin Spice is the Best Spice

🕒 Incomplete tasks Filter

✓ Incomplete tasks

Completed tasks >

All tasks



14. If you need to delete a task, just right click it and select “Delete”

+ Add task ▾

Task name

▼ **September Content**

- ▶ Fall Outdoor Movie Packages 7 🗨
- ▶ Custom Fabrication: Beach Wedding Boat

▼ **Content Ideas**

- Content from other sources
- Why Pumpkin Spice is the Best Spice

- Mark incomplete
- View details
- Full screen
- Open in new tab
- Copy task link
- Duplicate task
- Create follow-up task

Copy task name

Delete task