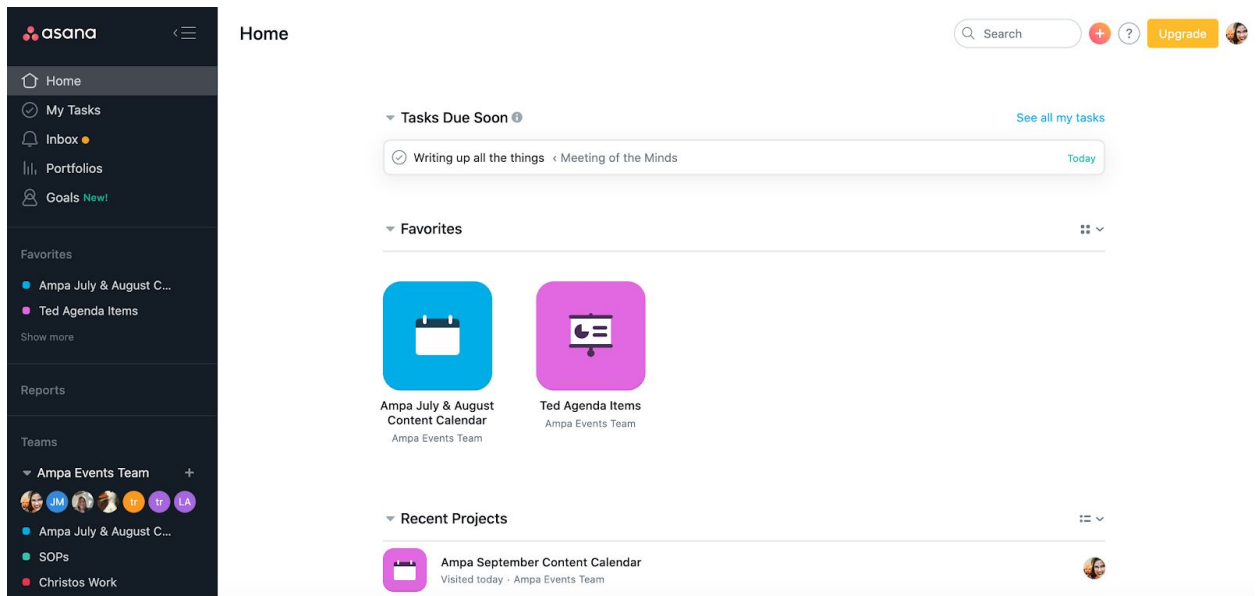# How to Use Asana

## 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.



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

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 |
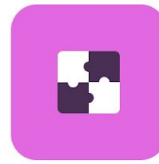
**General templates**    By ampaevents.com                                    Type: Marketing ⌄

Import spreadsheet
Import data from a CSV file
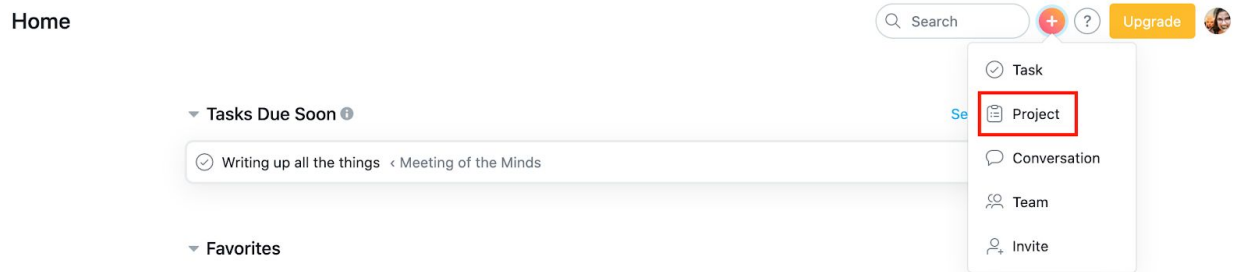
Agency Collaboration
List layout

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.

6. 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
Ampa September Content Calendar | Ampa Events Team ⌄

Privacy
● 👥 Public to Ampa Events Team team
○ 🔒 Private to project members  Upgrade to Premium
○ 👤 Private to me

**Create project**

7. 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...

+ Add task ⌄                          ⊘ 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



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



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

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 | | |
| ▶ [COPY ME] To add a new piece of content  9 | | |
| **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

![ampa events logo]

# 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.<br>Include things like "Fright Night" "Monster Movie Marathons" Halloween, etc. |

**Subtasks**

| | | |
|---|---|---|
| ⊘ Blog needs to be written | Aug 28 | tr |
| ⊘ Images need to be found for the blog | Sep 1 | JM |
| ⊘ Blog needs to be added to website | Sep 2 | |
| ⊘ Blog needs to be approved | Sep 3 | tr |
| ⊘ 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

| |
|---|
| ⊘ Blog needs to be added to website |
| | |
| A @ ☺ ☆ 📎         0 people will be notified   **Comment** |

Or on the individual subtasks

Blog needs to be written     Aug 28 (tr) 💬 ›

Subtask's notes and comments (Tab+→)

Images need to be found for the blog

Blog needs to be added to website     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

| 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)

b. Calendar



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



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
events**

Ampa September Content Calendar ⌄ ⓘ ☆  ○ Set status                    👥 Share

List   Board   Timeline   Calendar   Progress   Forms   More...

+ Add task ⌄

| Task name | ○ Incomplete tasks   �filter |
| --- | --- |
| | ✓ Incomplete tasks |
| ⌄ September Content | Completed tasks  › |
| | All tasks |

⋮⋮  ⌄ **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

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

| | |
|---|---|
| **+ Add task** ∨ | ⊘ Mark incomplete |
| | 👁 View details |
| Task name | ↗ Full screen |
| | ↗ Open in new tab |
| ▼ **September Content** | 🔗 Copy task link |
| | 🗐 Duplicate task |
| ▶ ⊘ Fall Outdoor Movie Packages 7 ⊟ | ⊕ Create follow-up task |
| ▶ ⊘ Custom Fabrication: Beach Wedding Boat | Copy task name |
| ▼ **Content Ideas** | Delete task |
| ⊘ Content from other sources | |
| ✓ Why Pumpkin Spice is the Best Spice | |