

# How To Use Asana



### Project Management Software for Beginners [Asana Tutorial 2021]

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Asana is a web and mobile work management platform designed to help teams organize, track, and manage their work. It is produced by the San Francisco based company of the same name. The company was founded in 2008 by Dustin Moskovitz and Justin Rosenstein. The product launched commercially in April 2012.

### **01** Profile Settings

Default name on Asana would be your email, so it would be nice to change it.

Your photo		
Upload your photo		
Photos help your teammates reco	gnize you in Asana	
Your full name	Pronouns	
info@nataliakalinska.com	Third-person pronouns (e.g. she/her/h	ers)
Role		
Role	Department or team	
About me		
Lusually work from 9am-5pm PST Feel	free to assign me a task with a due date anytime. Also, I	love doas!
Toology Hore Hore Sont Spritt Spritt	nee to assign the a lask man a date date when why this result, i	ore orga





You can also update your photo, bio, as well as the team you're working with.

Your photo	
Upload new photo - Remove phot Photos help your teammates recognize ;	
Your full name	Pronouns 💦
Natalia Kalinska	Third-person pronouns (e.g. she/her/hers)
Role	Department or team
About me	
1 usually work from 9am-5pm PST. Feet free t	o assign me a task with a due date anytime. Also, Llove





You can adjust your notification settings whether you like to be notified for/updates.

Profile Notifications Email Forwarding Account	Display Apps Hacks
Do not disturb	
袋 Pause notifications	
Schedule 🔉	
Do not notify me from: 5:00pm To: 9:00am	
Do not disturb me on my days off	
Sun Mon Tue Wed Thu Fri Sat	
Email notifications	
Preferred email	O About notification
info@nataliakalinska.com 👻	
Send me email notifications for:	
Activity updates New tasks assigned to you, @mentions, and completion	notifications for tasks you're a collaborator on





# **03** Email forwarding

	orwarding Account 0	Display Apps Hacks	
You can create tasks & conversation	s from email addresses asso	ciated with Asana.	
Create Tasks by emailing x@mail.as	ana.com. Tasks emailed will	appear in your My Tasks list.	
• The subject line will be the task		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
The body will be the task description			
All email attachments will be att			
You can cc teammates to add th	em as task collaborators		
Create conversations by emailing [			
goes to the Marketing team, and cu	stomer-success@mail.asana	com goes to the Customer Suc	cess team.
EMAILS SENT FROM		CONVERSATIONS IN	cess team.
			cess team.



# **04** Creating a Team

🔒 asana 🤄	Home
1 Home	
<ul> <li>My Tasks</li> </ul>	* Recent Projects
💭 Inbox	
, Portfolios	
	+
	New Project
Dream Team	
+ Add Team	

Name your team and add members, and adjust your tea's privacy.

Create new team	
Team Name	
Marketing Team	
Description	
Members	
🜒 info@nataliakalinsk × 🔐 Pam ×	
Privacy	
Membership by Request	
🛛 🐣 Hidden Upgrade to Premium	
Public to Organization Upgrade to Premium	





# **05** Creating a Project

👬 asana 🛛 🔄	Marketing Team ~ Overview Conversations	合 Calendar	
<ul> <li>☐ Home</li> <li>Ø My Tasks</li> <li>☐ Inbox</li> <li> i , Portfolios</li> </ul>		Description	Projects
Favorites ~		Members	+
Teams ^		Add member       Info@nataliakalinska.com       info@nataliakalinska.com	New Project
Marketing Team +     Marketing Team +     Marketing Team     Invite People     Foreate a Project     Add Team		Pam management@nataliakali See all members	

#### You can select from project templates or start with a blank project.

Choose a pro	oject template			
+	×	<b>E</b>	C	11
Blank Project	Cross-Functional Project Plan	Asana Basics Training	Team Brainstorm	1:1 Meeting Agenda
General templates	8y nataliakalinska.com			Type: Cross-functional ~
Import spre	adsheet ta from a CSV file			
1:1 Meeting				
Asana Basici				
Business cor	ntinuity plan			
Business Pla				



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Marketing Team	~
de to Premium	
	de to Premium

This is how your new project would look like.

Content Calendar ∨ ⊙ ☆ o Set status List Board Timeline Calendar Progress Forms More	() E Share Q. Search	🕘 😗 😡 lippele
+ Add task v	⊘ Incomplete tasks	N Sort ∲ Rules © Fields →
Task name	✓ Assign	ee Due date +
Click here to add a task		
+ Add section		

Start adding tasks to your project.

Content Calendar ~ ① ☆ O Set status List Board Timeline Calendar Progress Forms More	🚯 🏦 Share	a	Search
+ Add task	Ø Incomplete tasks	ΨF	iter
Task name		~	Assig
Record a How to Set Up Asana video			P
Write an Asana blog post			





# **07** Sections

Sections are helpful to categorize and group your tasks.

E Content Calendar ← ① ☆ ○ Set status List Board Timeline Calendar Progress Forms More	Share Q
+ Add task	⊘ Incomplete tasks
Task name	
Record a How to Set Up <u>Asana</u> video	
<ul> <li>Write an <u>Asana</u> blog post</li> </ul>	
✓ Youtube	
▼ Blog	
, ▼ Instagram	
+ Add section	

You can drag your tasks to move them from one section to another.

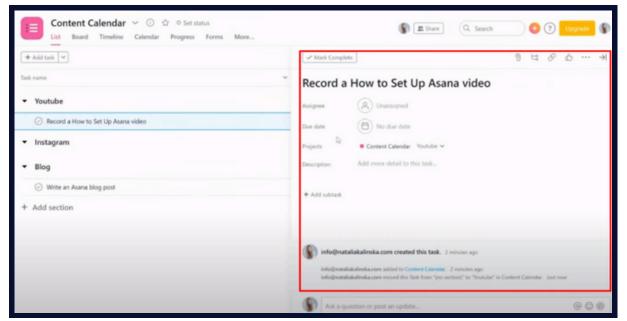
	Content Calendar V () 🛱 O Set status List Board Timeline Calendar Progress Forms More
	+ Add task
	Task name
	Record a How to Set Up Asana video
	Write an Asana blog post
	• Youtube
ſ	BRecord a How to Set Up Asana video
	▼ Blog
	+ Add section





### **07** Detailed Task View

Click on a task to open the detailed task view. Here you can see more information about the task.



Add assignee, due date, description and subtasks for the task.

Desert	- Herris Cattle Assess the				
Record	a How to Set Up Asana video				
Assignee	Natalia Kalinska				
Due date	Jul 14				
Projects	Content Calendar Voutube 🗸				
Description	Outline: I - point 1 - point 2 point 2 point 2 $Point = I = P @ \bigcirc$				
+ Add subtasi	Kalinska created this task. 2 minutes ago				
Natalia )	revious updates Calinska assigned to you. Just now Calinska chanced the due date to Jul 14. Just now				
	question or post an update		,	a 🙂	

**PAGE 09** 





## **Attachments**

Attachments may also be made to the task using this button.

- point 1 - point 2 - point 3 Subtasks Write an outline for the video Review the outline	Attach a File Your Computer Dropbox Google Prive Box OneDrive/SharePoint	
<ul> <li>Write a script</li> </ul>		
Record a video		(A)(A) (A)

# **O S Changing Color and Icons**

**PAGE 10** 

Content Calendar		ns More
Add task	Set color & icon	
ame	O Copy project link	
Youtube	<ul> <li>Save layout as default</li> <li>Duplicate</li> </ul>	Ersei
Record a How to Set Up Asan	🗇 Convert to template	A 11 1 1
Instagram	Add apps New!	****
Blog	Export/Print >	
<ul> <li>Write an Asana blog post</li> </ul>	Move to another team	The set of the set
add section	Archive Delete project	Set for Everyone

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#### Tasks appear as cards.

		〜 ① ☆ O Set Calendar Progres			Share	Q Sei
Created today					⊘ Incomplete ta	asks 👳 Filte
Youtube		··· Instagra	m	 Blog		+ Add co
	+		+	+		
- res		Record a How to 1	Set Up Asana video	Write an Asana blog post		

### **11** Calendar View

June 2020 🖂			Today 😨 Color:	Default 🗎 Weekends: Off 🛛 🖗
Mon	Tue	Wed	Thu	Fri
6	2		9	10
13	14.	15	15	17
Write an Asana blog post	S Record a How to Set Up Asama 4 La			







Gives a view of the progress of the task.

Content Calend		s Forms More	8	Share Q Search
This pro	j <b>ect has</b> no status -	— yet.		
Latest status	₽.	Remind me to update every Friday	Update status	About this project
				Owned by Natalia Kalinska
				Click to add project description.

Status updates can be done for this view with the button "Update Status".

Co	ontent Calendar ∨ () ☆ o Set status Board Timeline Calendar Progress Forms	More	Share
	This project has no status — yet	t.	
	Latest status	Remind me to update every Friday	Update status Abor
			8
Content Calendar      Sta	nus Update		D people will be notified
	Content planning done for this week		Let Highlights tell your story
	Status *   On Track  Ourser  Natalia Kalenska  Show or hide fields ~		Drag in groups of tasks and milestones to showcase the work your team is doing. Upgrade to Premoun Learn more
	Summary The session went well, we have more content in the pipeline. Please read comments for that need to be created asap. Thanks! 😻 🎯	e any graphics	Completed milestones
			Overdue milestones





# **13** Changing the Default View

You can add a project using the team button.

Dream Team				Status		<ul> <li>On Track</li> </ul>
	am	+	_	Owner		Natalia Kalin
	nvite People	Create project		Summ	ary	
Content Caler	dar	Use temp	late			well, we have m
		Import spre	adsheet	need to b	e create	d asap. Thanks!
		🕒 Blank projec	ct	-		
		S. Invite peopl	le	<b>()</b> v	/rite a o	omment
Browse Other Tea						
Browse Other Tea						
🕤 Ideas Board 🗸	ⓒ ☆ o Set sta	ahus trogress Forms More		6	. Share	Q, Search
€ Ideas Board ∨ List Board Timel	ⓒ ☆ o Set sta			6	⊘ All tas	
Lideas Board ~ List Board Timel Creased today	① ☆ O Set str ne Calendar Pi		··· Prioritize	ď		
Lideas Board ~ List Board Timel Creased today	① ☆ O Set str ne Calendar Pi	rogress Forms More	··· Prioritize	d +	© All tas	ks IT Filter Ni Sort
List Board V List Board Timel Creand today Post Ideas	① ☆ O Set str ne Calendar Pi	rogress Forms More	··· Prioritize		© All tas	ks IT Filter N Sort
List Board ~ List Board Timel Created today Post Ideas +	ⓒ ☆ O Set sta ne Calendar Pr ··· Bus	rogress Forms More	··· Prioritize		© All tas	ks IT Filter N Sort

To change the default view, just go to the view and pick from the dropdown and set it as a default

Ideas Board     List Board	-	s Forms More	(8) [2
+ Add task 🗸	Set color & icon		
ask name	🔗 Copy project link		
	Save layout as default		
<ul> <li>Post Ideas</li> </ul>	Duplicate		
<ul> <li>A cool gif post</li> </ul>	Convert to template		
<ul> <li>Business Ideas</li> </ul>	O+ Add apps New!		
🕗 Cat Pillow Launch	Export/Print >		
<ul> <li>Prioritized</li> </ul>	Move to another team		
+ Add section	Archive Delete project		



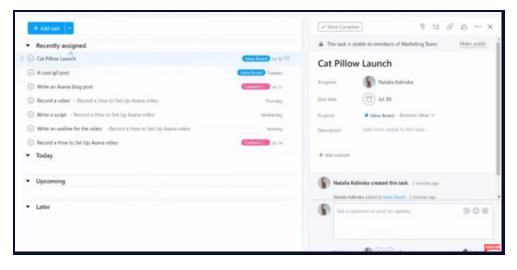




With My Tasks, you'll be able to see all your tasks in one glance. Default tasks not assigned to any section goes to Recently Assigned.

👬 asana 🛛 🔄	₩ Natalia's Tasks - nataliakalinska.com List Calendar Files	Q. Search 🕘 🕐 Ungows
1 Home	Last task completed on Jun 21	@ incomplete tasks 14 Sort
💭 Inbox	+ Add task	
hh. Portfolios	<ul> <li>Recently assigned</li> </ul>	
	Cat Pillow Launch	Adres Board Jul 30
	A cool gif post	Ideas Roard) Tuesday
	Write an Asana blog post	Content C. Jul 13
	Record a video - Record a How to Set Up Asana video	Thursday
	Write a script - Record a How to Set Up Asana video	Wednesday
Dream Team	Write an outline for the video < Record a How to Set Up Asana video	Monday
Marketing Team +	Record a How to Set Up Asana video	Content C. Jul 14
🚯 🎃 📗 Invite People	<ul> <li>Today</li> </ul>	
Content Calendar     Ideas Board		
	Upcoming	
	▼ Later	

If you click on a Task, the detailed view will show up.



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To select several tasks, hold the shift key and drag the tasks you want to highlight, then do a bulk action for them.

<ul> <li>Recently assigned</li> </ul>		
Cat Pillow Launch	Ideas Board	Jul 30 🔃
Write an Asana blog post	Mark for Today	TAB+Y
Record a How to Set Up <u>Asana</u> video	Mark for Upcoming	TAB+U
Today	Mark for Later	TAB+L
Write an outline for the video Record a How to Set Up Asana video	M	onday
Upcoming		
<ul> <li>A cool gif post</li> </ul>	Ideas Board Tu	iesday >
Record a video Record a How to Set Up Asana video	The	ursday
Write a script < Record a How to Set Up Asana video	Wedn	iesday



### **15** Completing Tasks

Tick the checkbox and the finished task will disappear from the list.

▼ Today	
Write an outline for the video Record a How to Set Up Asana video	Monday 10
• Upcoming	
11 GA A cool gif post	Ideas Board Timesiay
k task completer a video - Record a How to Set Up Asana video	Thursday
Write a script - Record a How to Set Up Asama video	Wednesday
Later	
+ Add task	
+ Add task V Today	
	Manday 10
Today	Manday 10
Today     Write an outline for the video Record a How to Set Up Asana video     Upcoming	Monday 10
Today     Write an outline for the video (Record a How to Set Up Asana video)	



### **16** Calendar view for My Tasks

June 2020		_				Today 🗎 Weekends: On 🚥
Sun	Mon	Tue	Wed	Thu	Pri	Sat
21	22	23	24	25	26	27
🕥 🛩 Update Asana	Content )日		🕼 - New post idea		Post 2	
V Create a task for yourself	🛞 🛩 🛄 Set a due date		Try Asana bri your computer			
	29	30	July 1	2	3	4
	North State	🕥 🖉 Lifestyle post				(5) 104.1 (7) (5) 104.2 (7) 104.1
	6	7		5	10	11
	Write an outline for t.     Imposed a How to fue	👔 🖉 A cool git post	Write a script Record & More to Set U	Record a video		
		54	15	16	17	18



# SCAN CALENDAR

VA STAFFE



### **BOOK A STRATEGY CALL**

### Jeff J Hunter

Founder VA Staffer Pre-Trained, Pre-Vetted Executive Assistants

