PRINCETON UNIVERSITY

ASANA User Guide

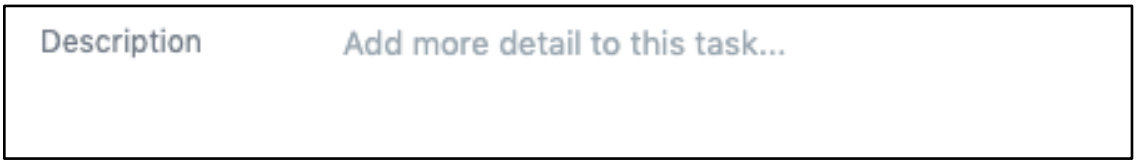
I. Setting Up ASANA

Sign into your ASANA account using your email address and create a custom password.

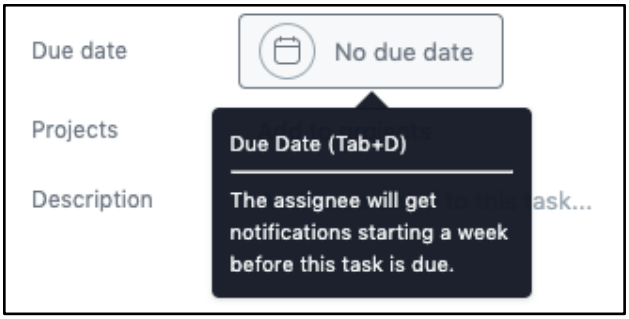
II. Creating Tasks

- You can create tasks for yourself in ASANA through clicking on ‘My Tasks’ towards the top of the screen, and then clicking the button ‘Add Task.’ If you hover over the ‘Add Task’ button, you will see an ‘Add Section’ button appear. Through creating a new section, you can segment your various tasks accordingly.

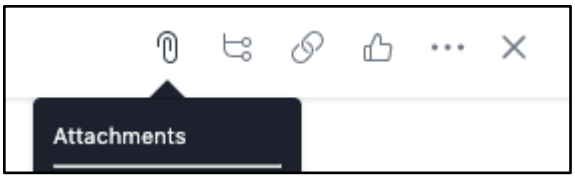
- You can add detailed descriptions to tasks through clicking on the task and adding a description in the area to the right.



- You can assign a due date to a particular task through clicking on the button ‘Due Date.’



- If your task involves the creation of an external document, you can attach it to the ASANA task through clicking on the paperclip button and attaching the respective document.



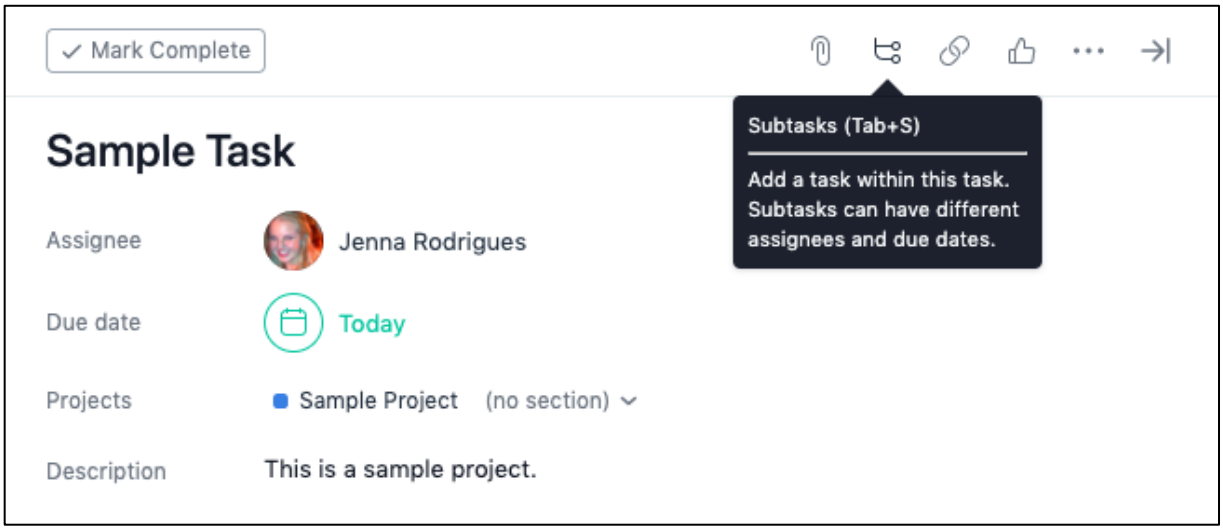
- In addition to creating tasks on your personal dashboard, you can create tasks and assign them to other team members. First, go to the menu on the left side of the screen and click on the appropriate project that the task pertains to. Click on ‘Add Task’ and assign the task to the appropriate team member who you feel would be able to effectively complete the task.
- You can add followers to a particular task (who will be alerted when new comments are made or there is a change in the status of the task) through clicking on the task, going to the screen to the right of the task and adding followers at the bottom of the screen.
- If you are collaborating with multiple team members on a task in ASANA, you can add comments to the task through clicking on the task and creating a comment in the section that says ‘Write a comment.’
- You can move tasks from one project to another in ASANA through clicking on the dot structure to the left of the task and sliding the task into a different project on the menu on the left side of the screen.
- When you finish a task, you should mark the task complete by clicking on the checkmark to the left of the task name. Once the task is marked complete, it will be removed from your task list.

III. Types of Tasks to Create in ASANA

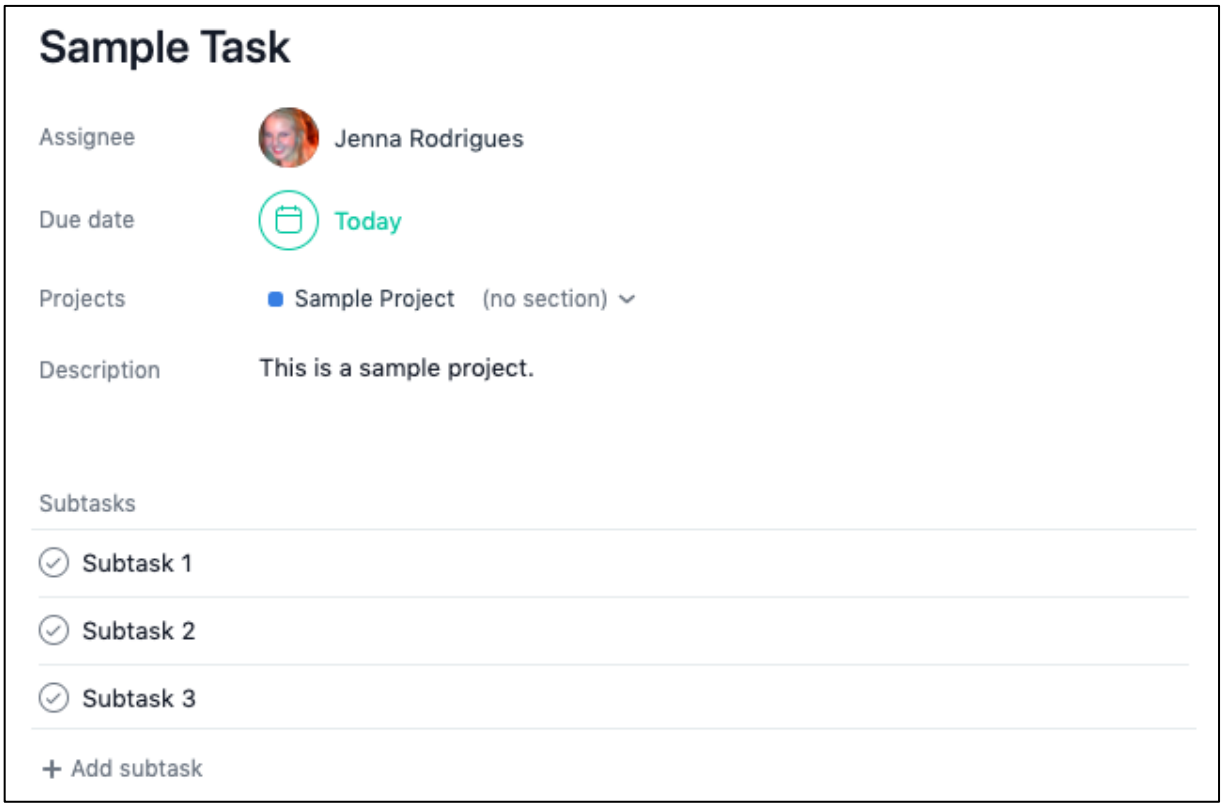
All created tasks should be clearly labeled, properly assigned to an individual who can confidently complete the task and tagged with an agreed upon deadline. This will help your team to clearly see who is responsible for what so that they can distribute work accordingly.

Task description should be a brief description of the task that you need to complete. The description should be clear enough so that project managers can quickly understand the essence of the task through the name itself.

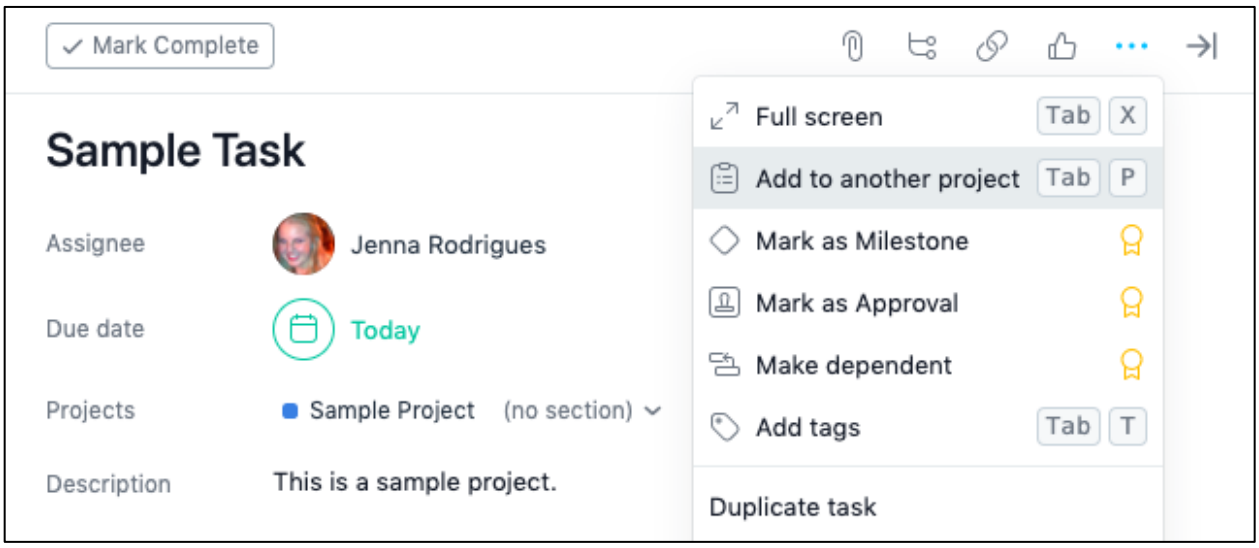
A. Subtasks: You can create a more detailed breakdown of smaller line items within a task by adding subtasks. In order to add a subtask, select the parent task and click the subtasks button on the right pane. After adding one subtask, you can simply press enter to add additional subtasks under the main task.



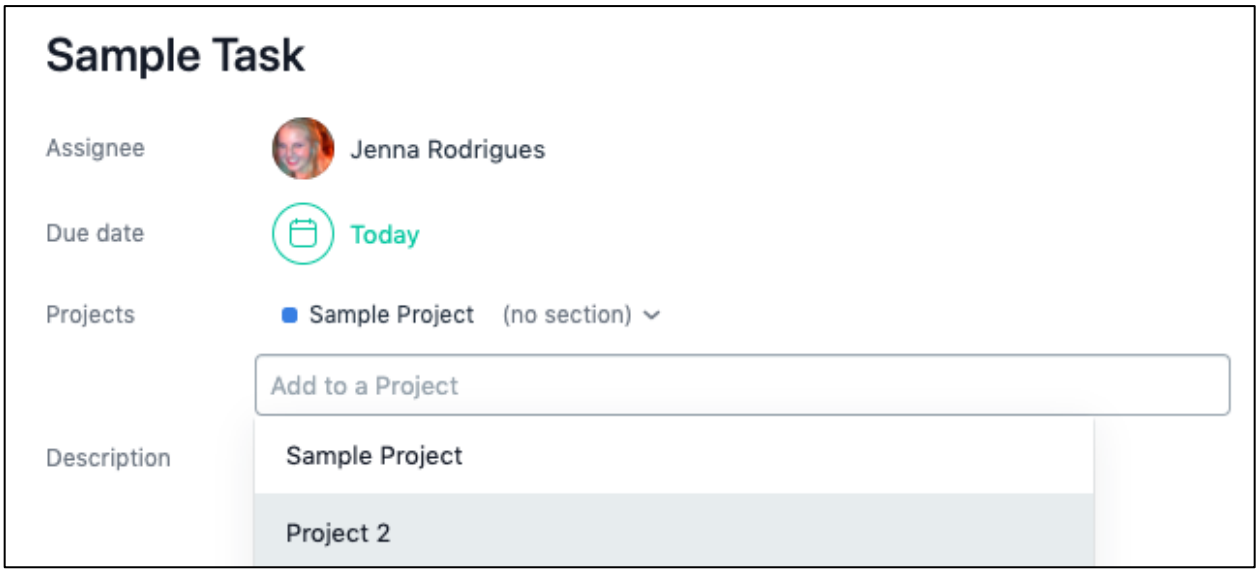
After adding subtasks, your screen should look like this:



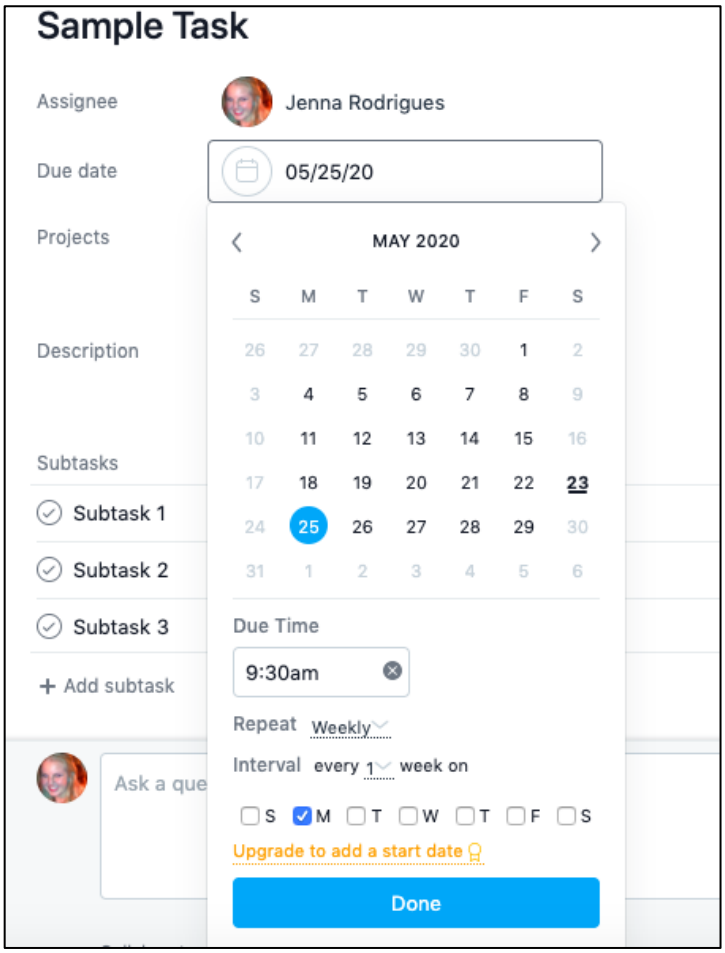
B. Add Task to Multiple Projects: In order to add a task to two different projects, first click into the task. Next, click on the … button on the right pane. In the dropdown menu, click on 'Add to another project.'



Then select the name of the second project you would like to add the task to:

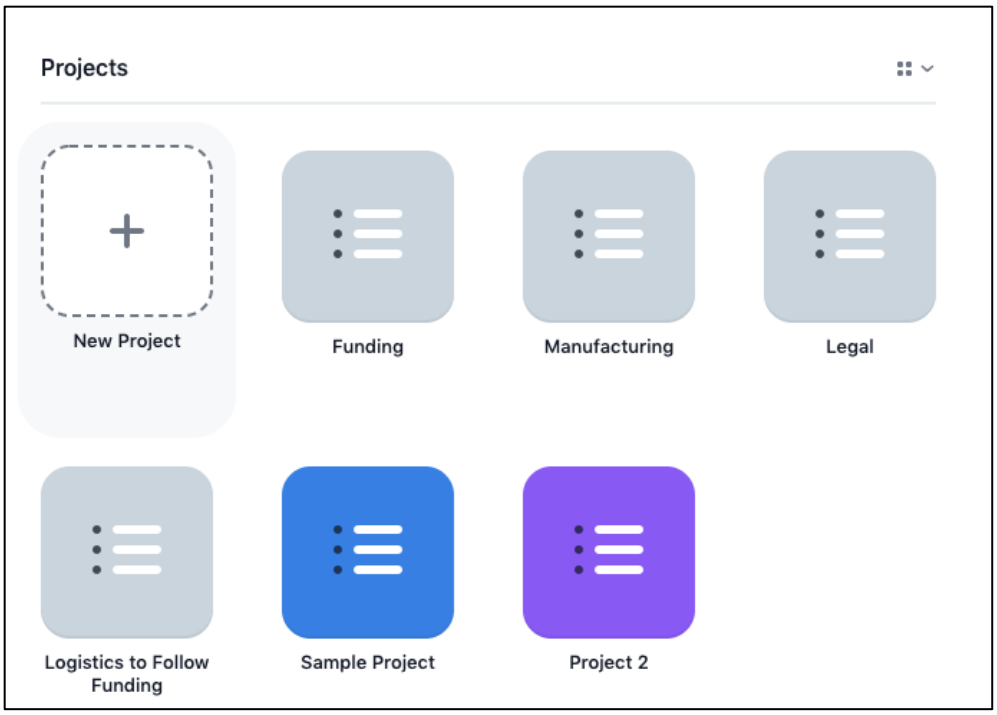


C. Recurring Tasks: You can select to make a task recurring and add a time deadline. In order to do this, click on the due date, select repeat and then choose how frequently you would like the task to be repeated from the dropdown menu. You can also select the time deadline, the interval, and the day of the week for the repeated task.

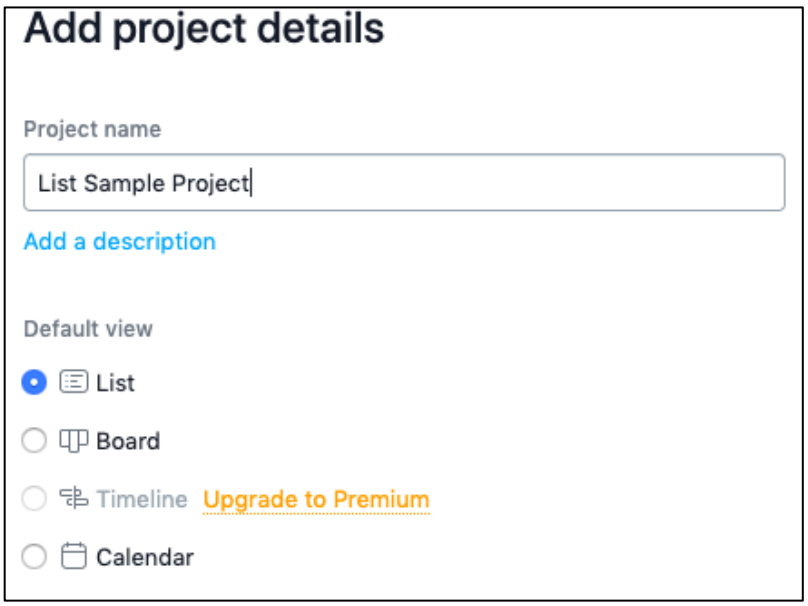


IV. Types of Projects

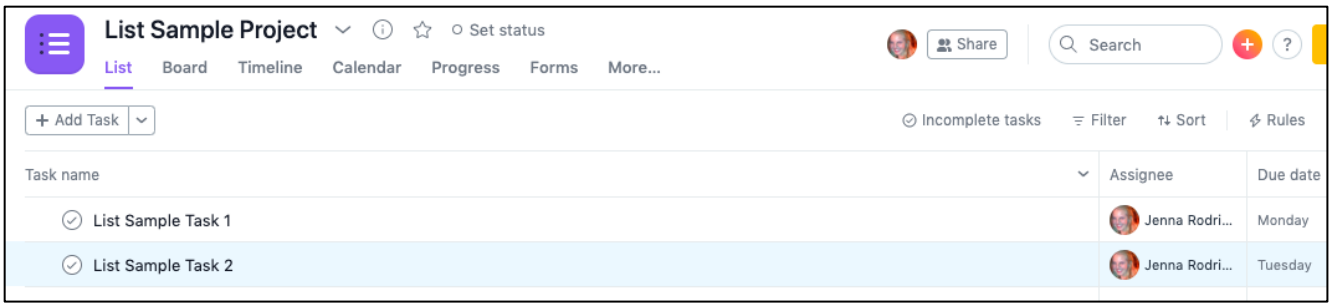
There are several types of projects that you can create in Asana. In order to create a new project, first select new project.



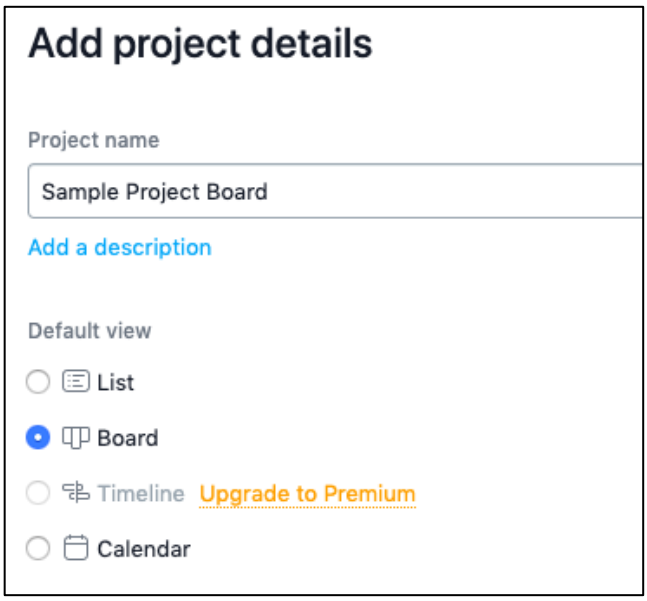
Once you add a new project type, you can utilize a template or start with a blank project. If you decide to start with a blank project, you can structure the project as a list or a board. If you select to structure it as a list, click list under the Default View dropdown menu.



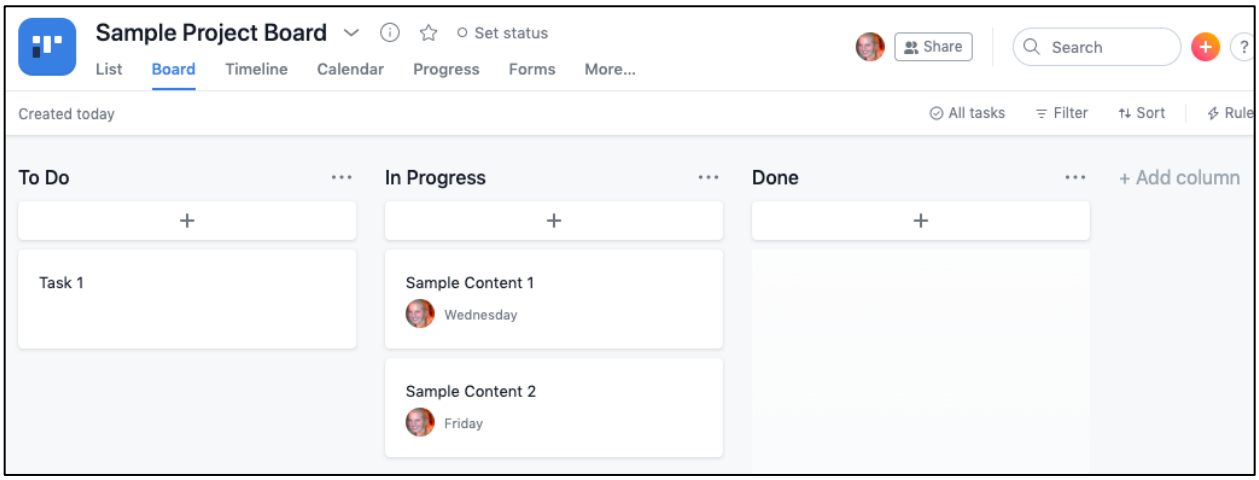
This is how your project will look if you choose to structure as a list.



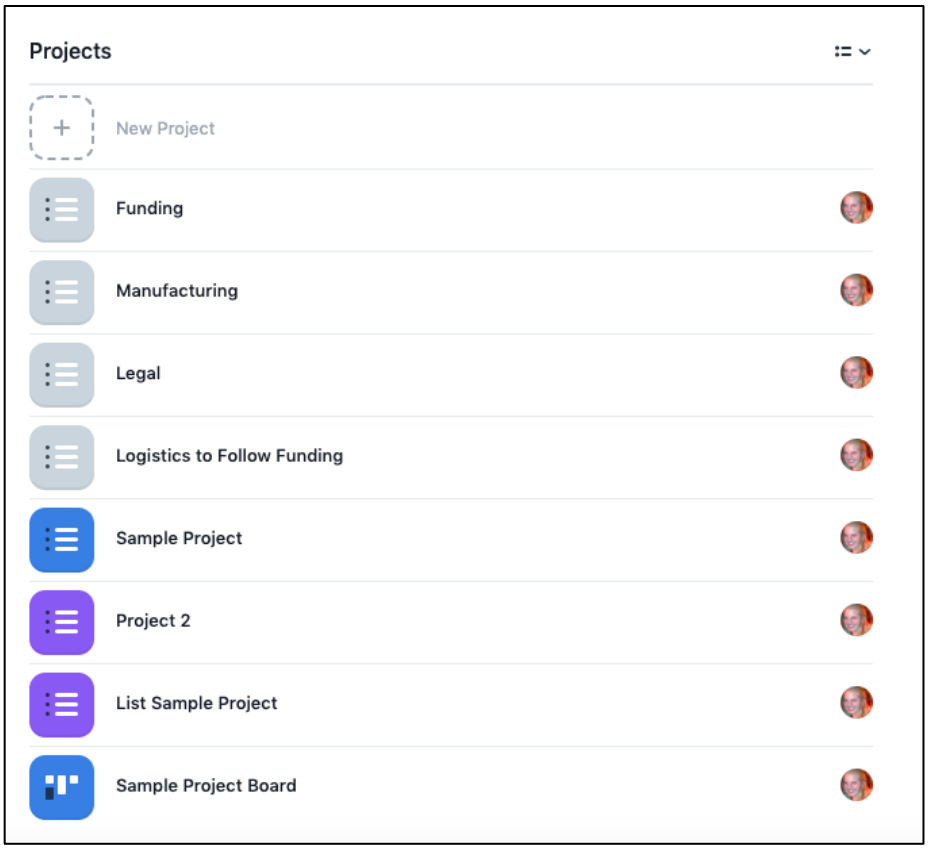
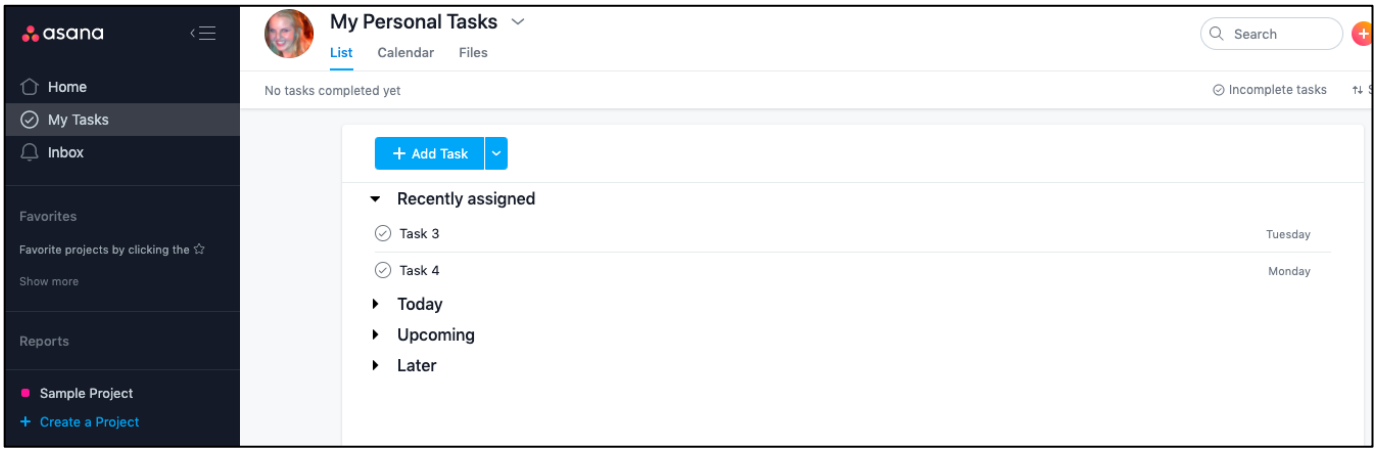
If you choose to structure as a board, choose board from the Default View dropdown menu.



This is how your project will look if you choose to structure as a board.



You can see an overview of all of your projects structured as a list or as title blocks.



On the left pane, you can click on ‘My Tasks’ to view all of your current tasks. Both tasks that individuals assign to you and tasks that you assign to yourself will show up under my tasks.