

# TechMatters: Asana: Task Management and Collaboration in the Cloud

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Whether it is developing learning objects, constructing lessons and curricula, or formulating assessment plans (to just name a few possibilities), much of the work of instruction librarians is project-based and very often collaborative. When working on team projects, one of the keys to success is task organization and management. Central to the effective management of a team project is the ability to identify and share project tasks, assign deadlines, and track progress. Unfortunately, the larger the team, the more difficult it can be to keep everyone on the same page and moving forward. To help deal with this challenge, Asana (<https://asana.com/>) is an online collaboration tool that seeks to make it easy for teams of any size to track their work and thereby meet their project goals.

## Getting Started

Currently, Asana operates on a “freemium” pricing model. The basic version—which is free for all users—allows you to create an unlimited number of projects and tasks, include up to 15 team members, and utilize basic project dashboards. “Premium” and “Enterprise” versions offer—for an annual subscription fee—additional features such as no team member limit, advanced searching & reporting, ability to indicate task dependencies, and the option to designate teams and projects with increased privacy controls.

To create an account, simply click on the “Get Started for FREE” button and provide your email address: if it is your work email address (e.g., [john.doe@gsu.edu](mailto:john.doe@gsu.edu)), its domain name will almost always be used to connect you with other people in your “organization” (in this case Georgia State University); if it is your personal email (e.g., [john.doe@gmail.com](mailto:john.doe@gmail.com)), you can still connect to other people,

who likely do not share your email domain, in a “workspace”. After verifying your address, you will be asked to provide some additional information including your name, organization name, and a password.

## Add Tasks

An essential step in any project is identifying the discrete tasks that must be completed in order to accomplish the end goal. As you identify these tasks, you can easily add them to Asana using the “Add Task” button (see Figure 1). When you add a task, a task details panel will open next to the list view. Here you can provide a more complete description of the task, assign a due date, create sub-tasks, add a category tag, and attach relevant files. As you add tasks, you can organize them by adding section headings (which you can do by hovering over the Add Tasks button, and then clicking on the Add Section button) and then dragging them to the appropriate group.

## Create a Project

After creating a few tasks, you will very likely want to assign them to a particular project. To create a new project, click on either the “+” button in the main navigation bar, or the one located beside the “Projects” category in the left navigation panel (see Figure 1). This will open a dialog box where you enter your project name, add an optional project description, select a layout (an itemized list or a sticky notes-like board), and determine whether others in your organization can view your project or if you would like to keep it private.

Once your project is created, you can assign tasks to it using the “Add to Project” field in the task details panel. A

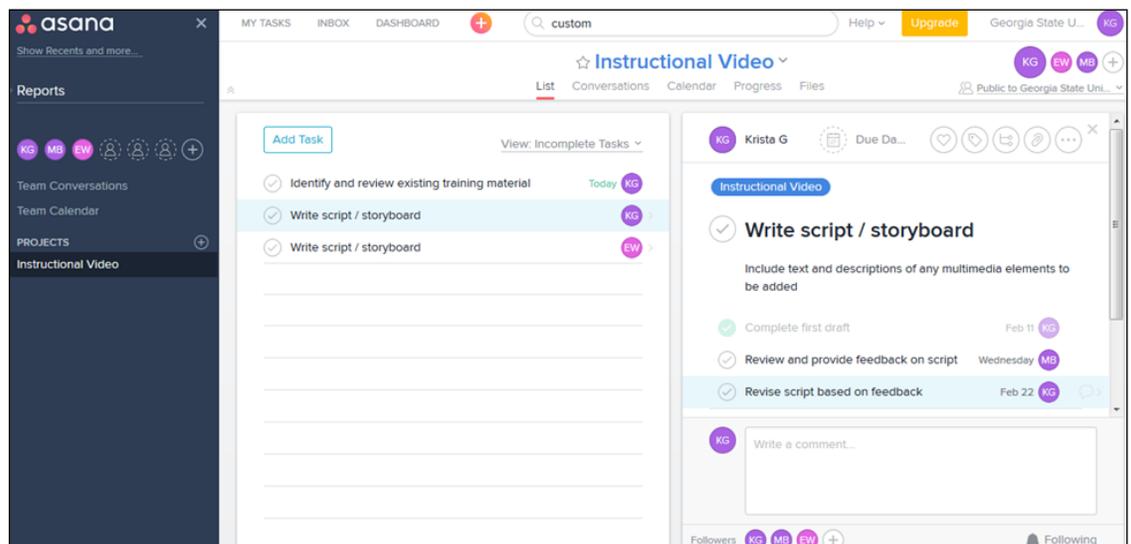


Figure 1: Task list view from within an Asana project

task may be assigned to more than one project. Each project may have only one owner, but may have multiple members. Both owners and members can add, remove, and edit tasks in the project, but only the owner may update the project's overall status.

### Add Project Members

If you are using the free version of Asana, you may add up to 15 members to collaborate on your projects. To add a team member, click on the “+” button beside the team member initials located in the left-hand navigation bar (e.g., KG, MB and EW in Figure 1) and then click on the pencil icon above the search box. Provide the new team member's email address and name (optional) and then “Send invite”.

Once your team members sign up for Asana, you can begin working together on tasks and projects. In order to add collaborators to a specific task or project, you need to make sure that it is “public” to your workspace/organization (or upgrade to the Premium version of Asana which allows private group projects).

### Collaborate

Having setup your projects, added tasks, and invited team members, you can now start to take advantage of the collaborative features of the tool. Begin by assigning tasks to specific individuals. While a particular task (or sub-task) may only be assigned to one person, you can also add “followers” who will receive updates and notifications about updates to the task. Alternately, if you really need multiple individuals to take action on a task, you can create copies of a task and then assign each one to a separate team member. For example, you might want to do this if you had a document that needed review and sign-off by all team members before moving forward. By having each copy of the task have only one assignee, there is no confusion over who is responsible for completing that particular task.

As individuals work on tasks, the system provides a variety of features to facilitate their work and allow them to communicate and share progress. For example, if a due date has been assigned to a task, the assignee will receive an automatic notification one week in advance to remind them to carry on with their work on the project. Likewise, an overdue message will be sent via email when a deadline is missed. Team members can “comment” on a task to ask questions, offer ideas, and provide feedback; this allows conversations to develop and ideas to evolve around a particular task or project reducing the need to send and create emails or chat threads about a task outside of Asana. Users can also attach a file to share with the team either from a personal device or drive or alternately from a cloud drive such as Dropbox, OneDrive, or Google Drive.

Also, each project and workspace contains a calendar view that allows team members to keep track of deadlines and project milestones. From within a calendar view, individuals can update tasks directly including creating new tasks, changing due dates, and marking them as complete. Asana calendars can also be synced to other calendar tools such as Outlook and Google Calendar.

### Premium Features

Beyond the features offered to users of the free version of Asana, it is worth mentioning a few useful features that are only available to those willing (and able) to pay for the “Premium” version of the tool.

First, premium users have the option to add custom fields which can be used to further describe and categorize tasks. This allows you add as many descriptive fields as you need to organize and track project tasks. So, for example, you might add “Estimated Hours”, “Project State”, “Priority” or anything else you find useful as a category. You can then sort and summarize tasks by the attributes of these custom fields.

Second, to help your team setup tasks for common types of projects, the folks at Asana have developed a variety of workflow templates that can be used as a starting point and customized to conform to your organization's needs and practices. Two of these project templates, “Asana onboarding” and “meeting agenda”, are available to users of the free version. The others, including templates for product launches, event planning, candidate tracking, and company goals and milestones are available only to Premium users.

Finally, Asana provides premium users with the ability to indicate task dependencies. So, for example, it is possible to indicate that work on one particular task is “waiting on” completion of a separate task. When this feature is used, an automatic notification can be sent to the relevant individual(s) when work is completed on one task and therefore ready to begin on another.

### Conclusion

If you are looking for a flexible tool to allow you and your colleagues to track progress on collaborative projects, I recommend that you take a look at Asana. With its relatively intuitive and easy-to-use interface, Asana will allow your team to quickly begin outlining project milestones and assigning deadlines and responsibility for completing key tasks. At the same time, team members can easily communicate with one another and get a “big picture” view of your project's progress. As a result, you may discover that you team needs fewer face-to-face team meetings, while simultaneously finding increased opportunities to collaborate effectively. Give it a try!