Fall 2024 release

asana
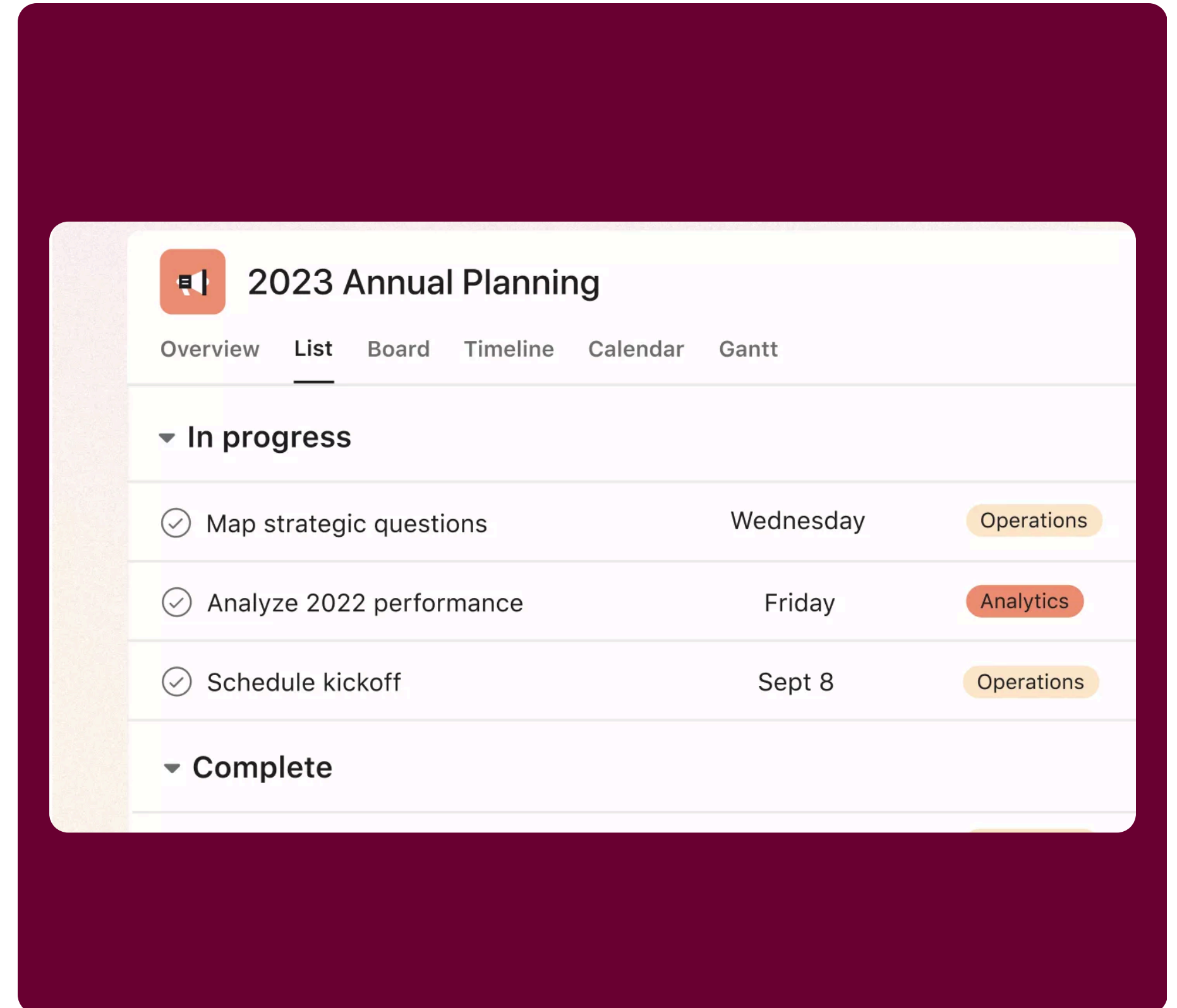
Q3 • NOVEMBER

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Project and task management

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Project and task management

✓ **My tasks enhancements**
Manage and prioritize work with custom views and notes

✓ **Board view enhancements**
Optimize board view with assignee grouping, sorting, and hidden empty groups

✓ **Forms enhancements**
Kick off work faster with an easier way to find and submit forms

✓ **Advanced search enhancements**
Boost productivity and keep work moving

2023 Annual Planning

Overview   List   Board   Timeline   Calendar   Gantt

▾ **In progress**

✓ Map strategic questions	Wednesday	Operations
✓ Analyze 2022 performance	Friday	Analytics
✓ Schedule kickoff	Sept 8	Operations

▾ **Complete**

Manage and prioritize work with custom views and notes in my tasks

Overview
In my tasks, create and save custom views with filters, sorting, grouping, and color-coding to easily monitor and prioritize your work, while using notes to capture key ideas and resources.
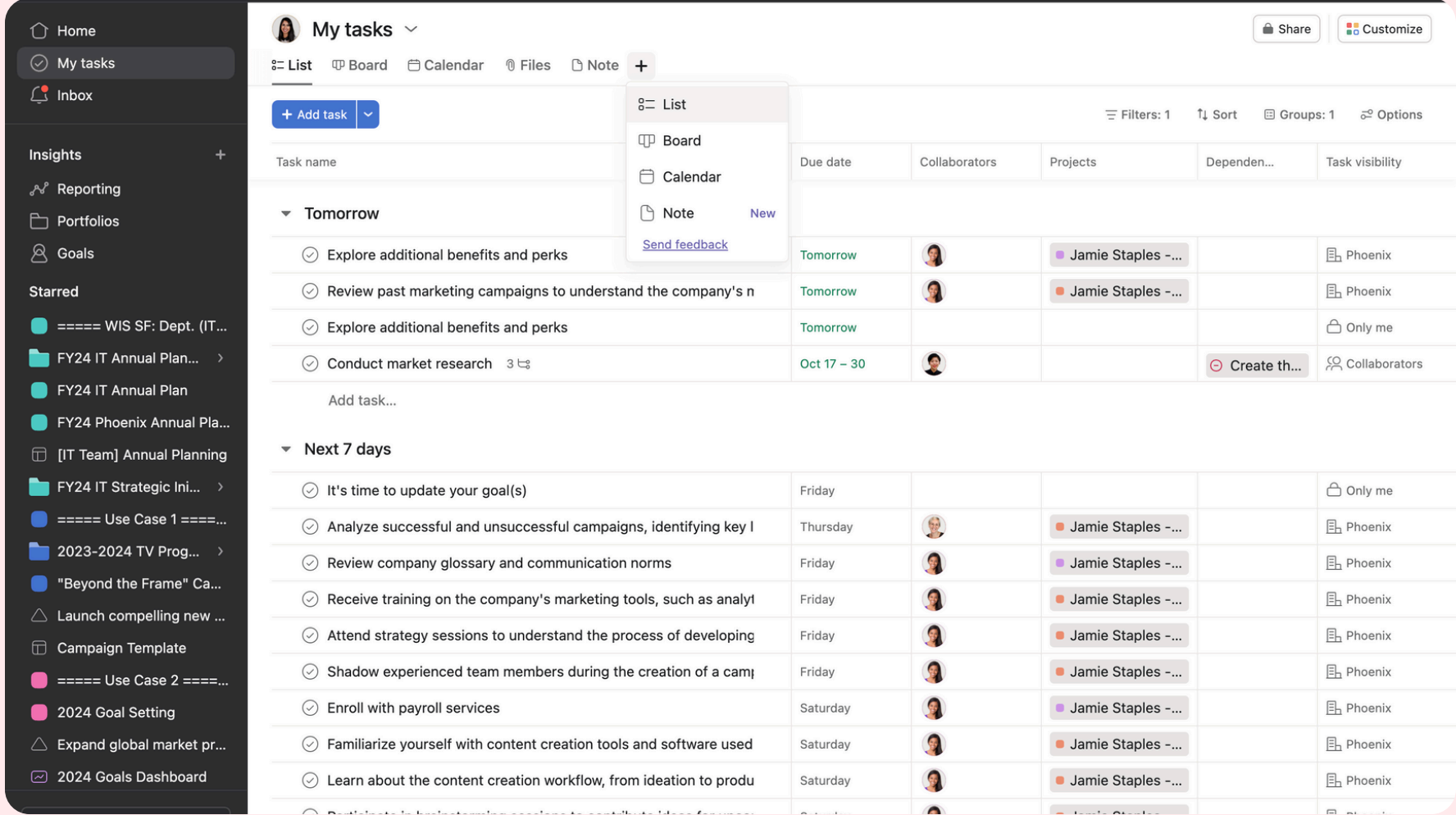
Key benefits
- Tailor your setup with saved views, filters, grouping, and color-coding
- Stay organized and on track by adding notes to capture key ideas and resources

Key use cases
- Personal productivity
- Organizing important links and resources

How it works
Go to my tasks to organize your work with filters, sorting, and groupings. Add notes for context, switch between views, and save your setup for quick access later.

Optimize board view with assignee grouping, sorting, and hidden empty groups

Overview
Group by the assignee field (projects only), sort/reverse sort groups, and hide empty groups in both projects and my tasks.
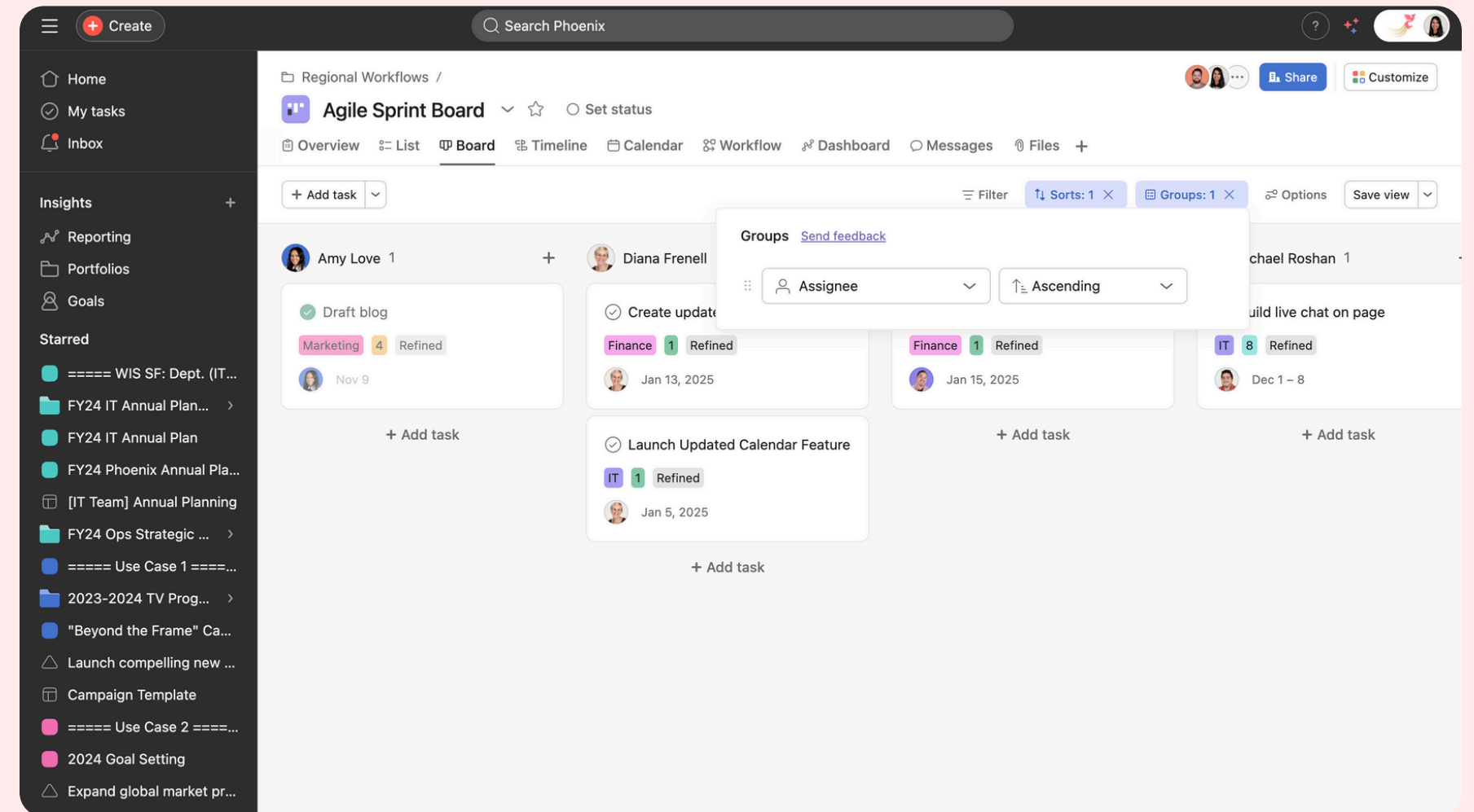
Key benefits
- Plan sprints efficiently with assignee-based grouping and sorting
- Balance workloads by organizing tasks and hiding empty groups
- Manage tasks flexibly with enhanced grouping and sorting across projects and my tasks

Key use cases
- Sprint planning
- Balancing workload by tasks

How it works
Group tasks by Assignee to view workload, sort/reverse sort groups by priority, and hide empty groups to reduce clutter.

Kick off work faster with an easier way to find and submit forms

Overview
Forms can be submitted directly within project sections, enhancing visibility for both submitters and process managers.
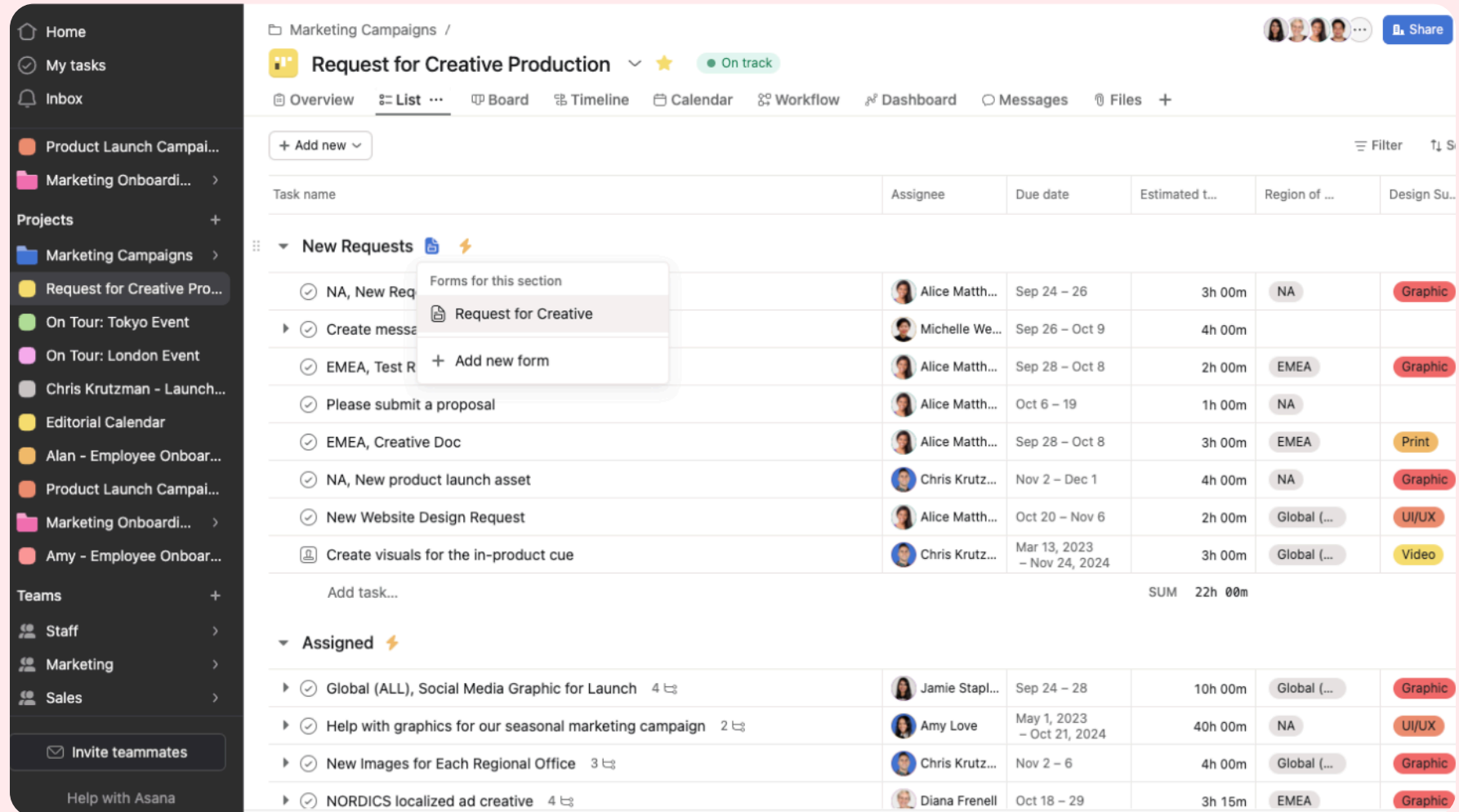
Key benefits
- Quickly access and manage forms directly from the project list view
- Enhance visibility and speed up processes by linking forms to project sections

Key use cases
- Work intake
- Campaign management
- Creative production

How it works
Locate the form icon in the project list view to access forms. Editors can modify forms and map submissions, while viewers can submit tasks directly through forms within project sections.

Boost productivity and keep work moving with enhanced advanced search capabilities

Overview
We've made it easier to apply and edit advanced search filters, allowing you to refine search queries with less effort.
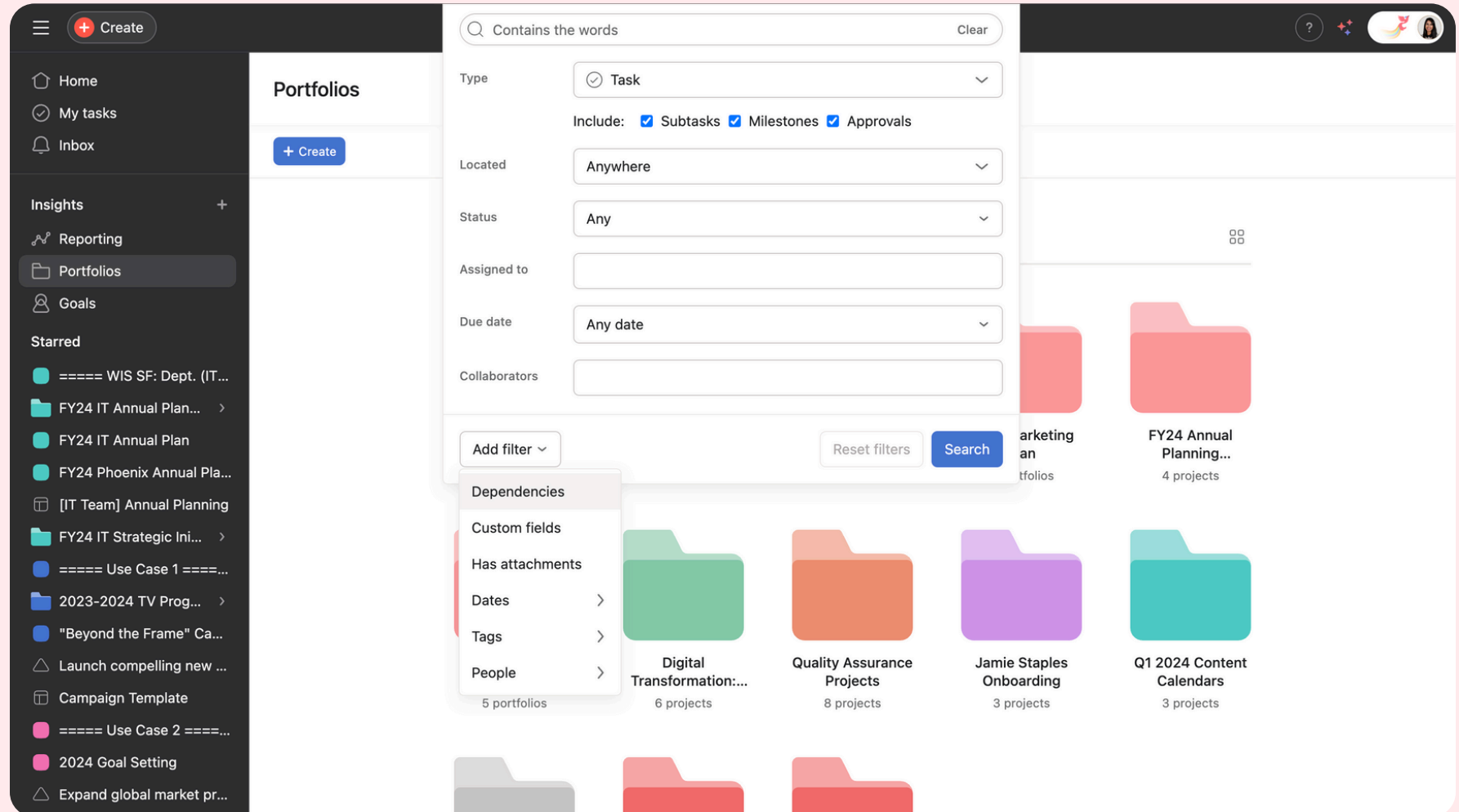
Key benefits
- Stay focused by quickly finding relevant tasks and information
- Save time by refining search queries with less effort

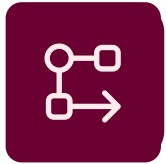### Key use cases
- Personal productivity

How it works
Click Search, select Advanced Search, and use the available parameters to refine your query.
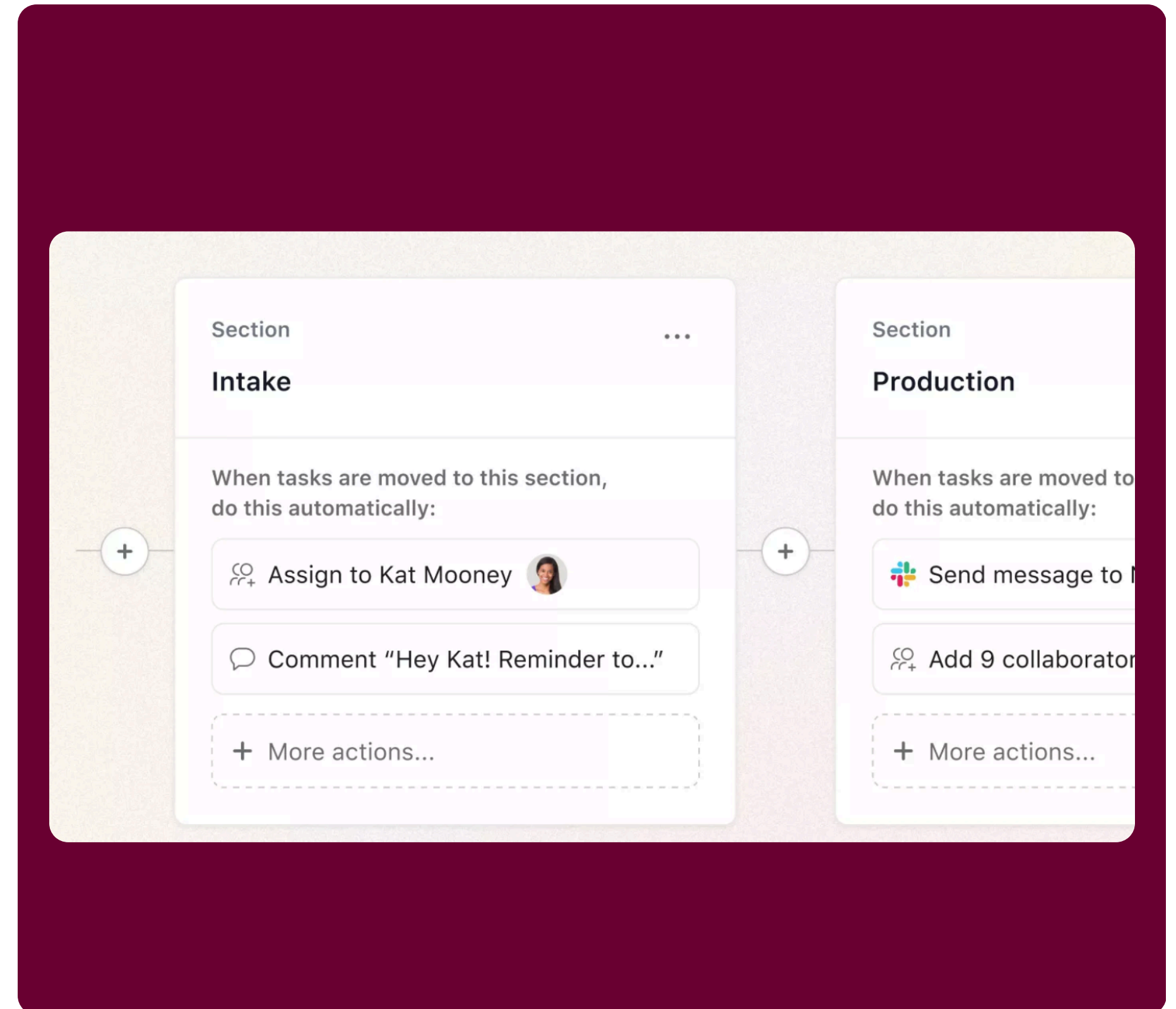
Workflows and automations

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Workflows and automations

✓ **Manual triggers**
Enable greater control of when rules are activated

✓ **Rule triggers for numerical custom fields**
Streamline workflows with dynamic rule triggers

✓ **Date-based automations**
Improve efficiencies with new date-based automations

✓ **Trigger actions based on milestones or approvals**
Automatically share key updates across work streams

✓ **Coupled conditions**
Automate complex workflows more easily

✓ **Custom field management dashboard**
Drive consistency in workflow reporting

✓ **Project template management dashboard**
Optimize workflows with centralized template management

Get greater control of when rules are activated with manual triggers

Overview
Create rules that can be triggered manually, rather than automatically based on preset conditions.
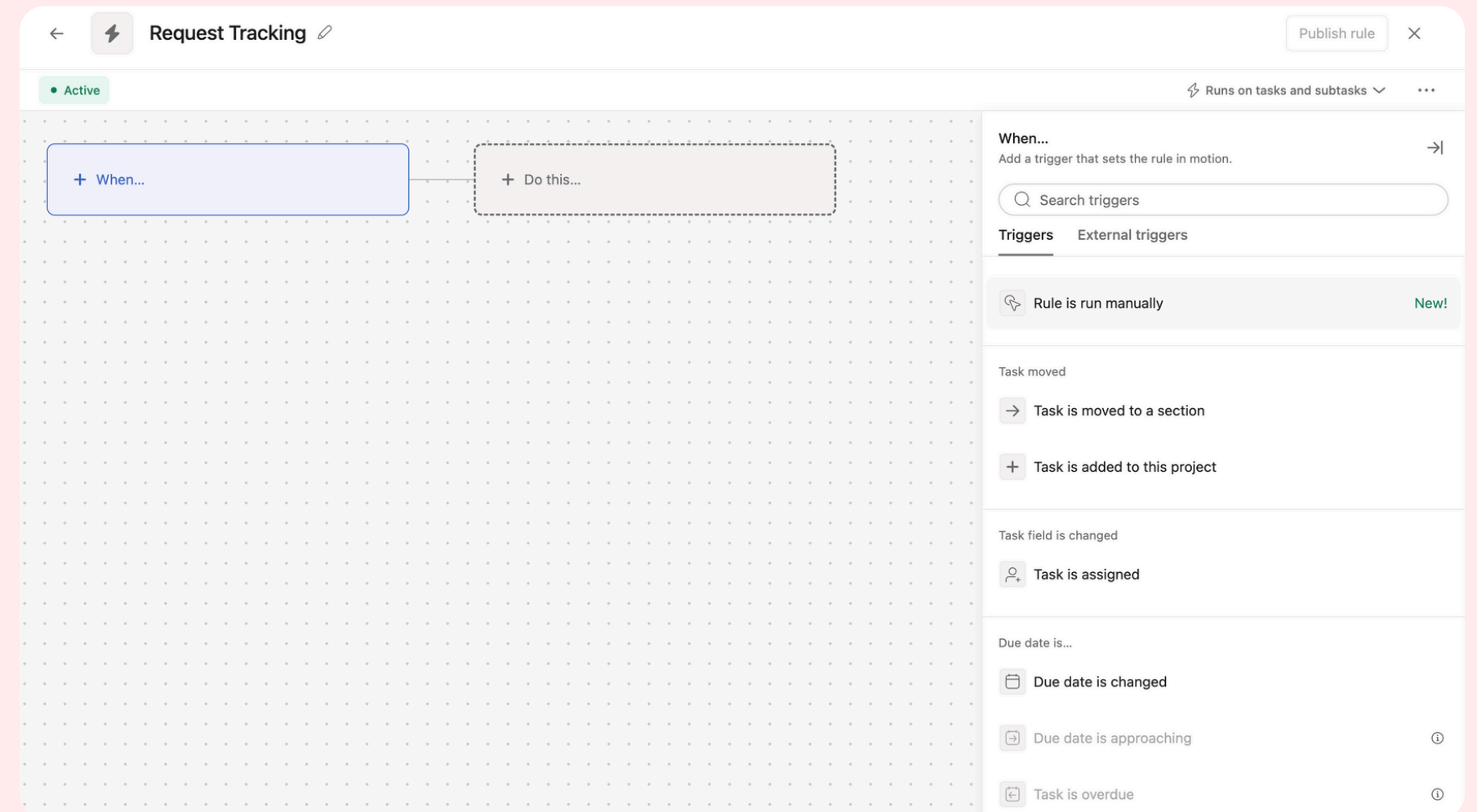
Key benefits
- Start automations exactly when needed, with full manual control
- Streamline complex processes by initiating workflows at key moments
- Prevent unnecessary actions by avoiding automated triggers

Key use cases
- Strategic planning
- Project management

How it works
Open the rule builder, select a manual trigger, and pair it with actions to fit your workflow needs.

Streamline workflows with dynamic rule triggers for numerical custom fields

Overview

Trigger automations when numerical custom fields change, enabling workflows like budget alerts or task sorting by cost. This update supports dynamic workflows and lays the foundation for future math-based automations.

Key benefits

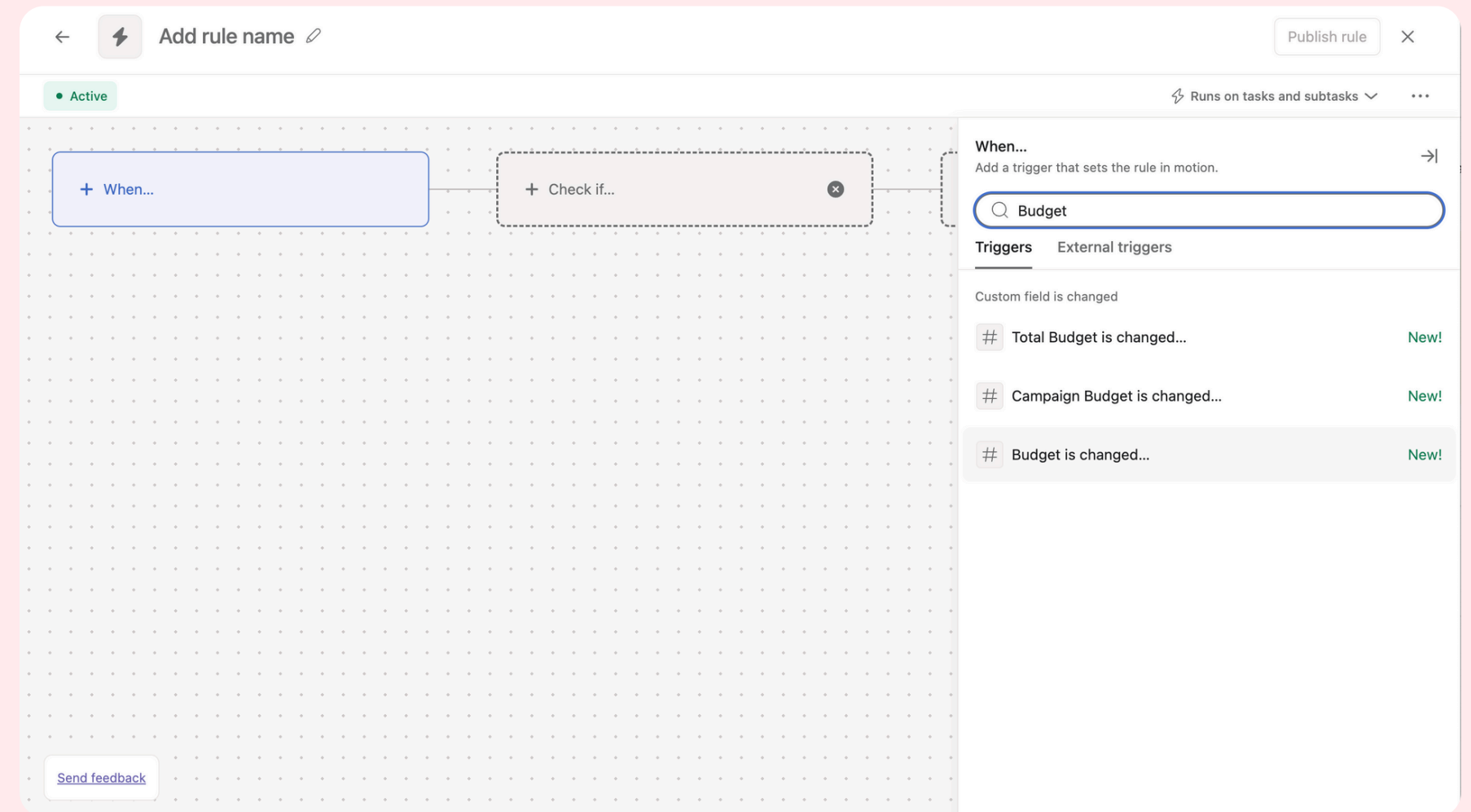- Automate workflows with real-time triggers when numerical custom fields change
- Enable precise tracking by setting alerts or sorting tasks based on numeric values

Key use cases

- Campaign management
- Creative production
- Work intake
- Review & approvals

How it works

Use the rule builder to trigger actions based on numerical field changes (e.g., notify when "Budget" exceeds a threshold).

Improve efficiencies with new date-based automations

Overview
Set dates in rules relative to any other date, including past ones, for greater precision in automating project timelines.

Key benefits
- Streamline workflows with consistent date management
- Use negative offsets to set past dates
- Automate deadlines with precision using date custom fields

Key use cases
- Project intake
- Strategic planning

How it works
Use the rule builder to set triggers based on task dates or date custom fields. Apply negative offsets to create tasks with past due dates, ensuring timely preparation.

Automatically share key updates across work streams based on task milestones or approvals

Overview
Automate workflows by triggering actions based on milestones or approvals to streamline their management and tracking.

Key benefits
- Unlock new automation workflows using milestone or approval tasks as triggers
- Improve efficiency by automating milestone tracking and overdue notifications

Key use cases
- Strategic planning
- Project management
- Product launches
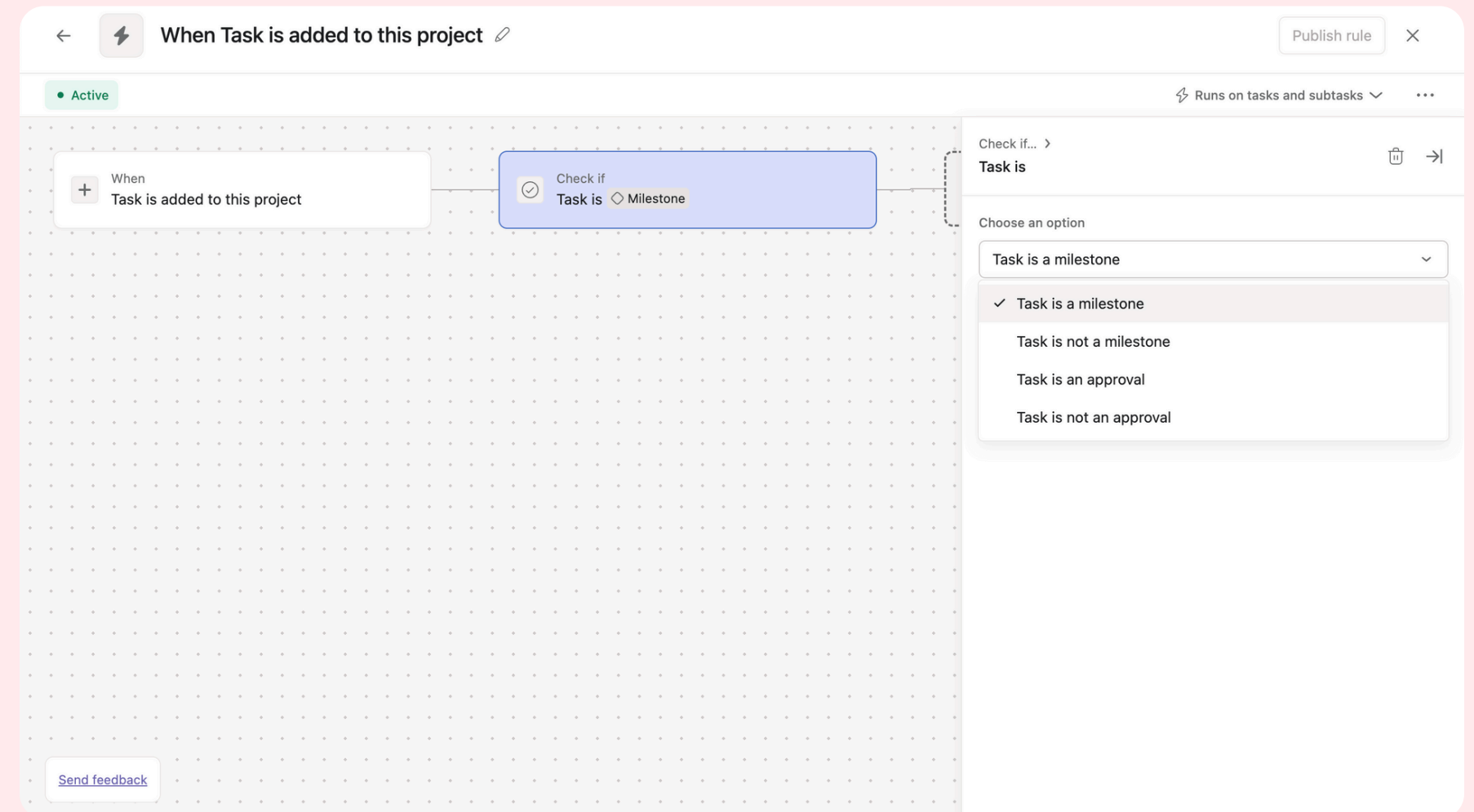
How it works
In the rule builder, hover over the trigger card and click the '+' button that appears on the right to add conditions.

Save time and reduce manual work by automating complex workflows more easily

Overview

Optionally include or couple specific conditions as part of the rule trigger.

Key benefits

- Combine triggers and conditions for flexible automation
- Simplify rule creation for seamless workflow automation

Key use cases

- Project intake
- Strategic planning
- Resource planning
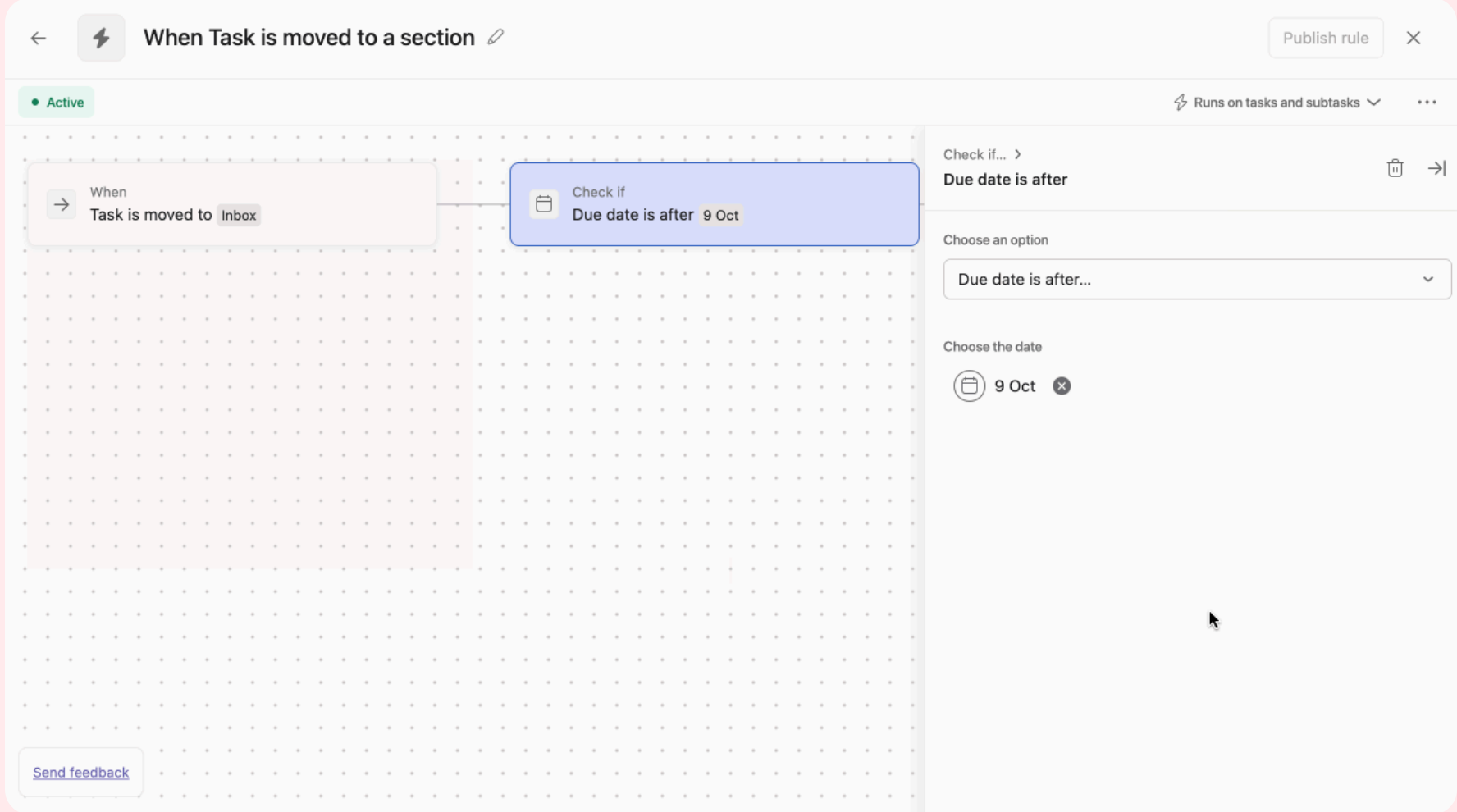
How it works

Create a trigger and optionally pair it with a related condition to build more dynamic automation rules.

Drive consistency in workflow reporting with centralized custom field management

Overview

The management dashboard for global custom fields allows you to maintain consistency in workflows and accurate reporting across multiple projects by offering visibility on exactly which projects a global field is being used in.

Key benefits

- Track where global fields are used to maintain consistent workflows
- Maintain accurate data across projects for better reporting
- Search and manage fields efficiently without navigating individual projects

Key use cases

- Work intake
- Portfolio management

How it works

The preview tab provides a quick understanding of a custom field's purpose, including its description and type. In the dashboard tab, you can easily view and search all projects where the custom field is used.

Optimize workflows with centralized template management

Overview

The project template management dashboard streamlines template management by offering visibility into how templates are used, ensuring consistency across projects and enabling easier updates.

Key benefits

- Maintain consistency across projects with standardized templates
- Quickly identify and update templates to optimize workflows
- Improve efficiency by tracking template usage across teams

Key use cases

- Campaign management
- Product launches
- Portfolio management
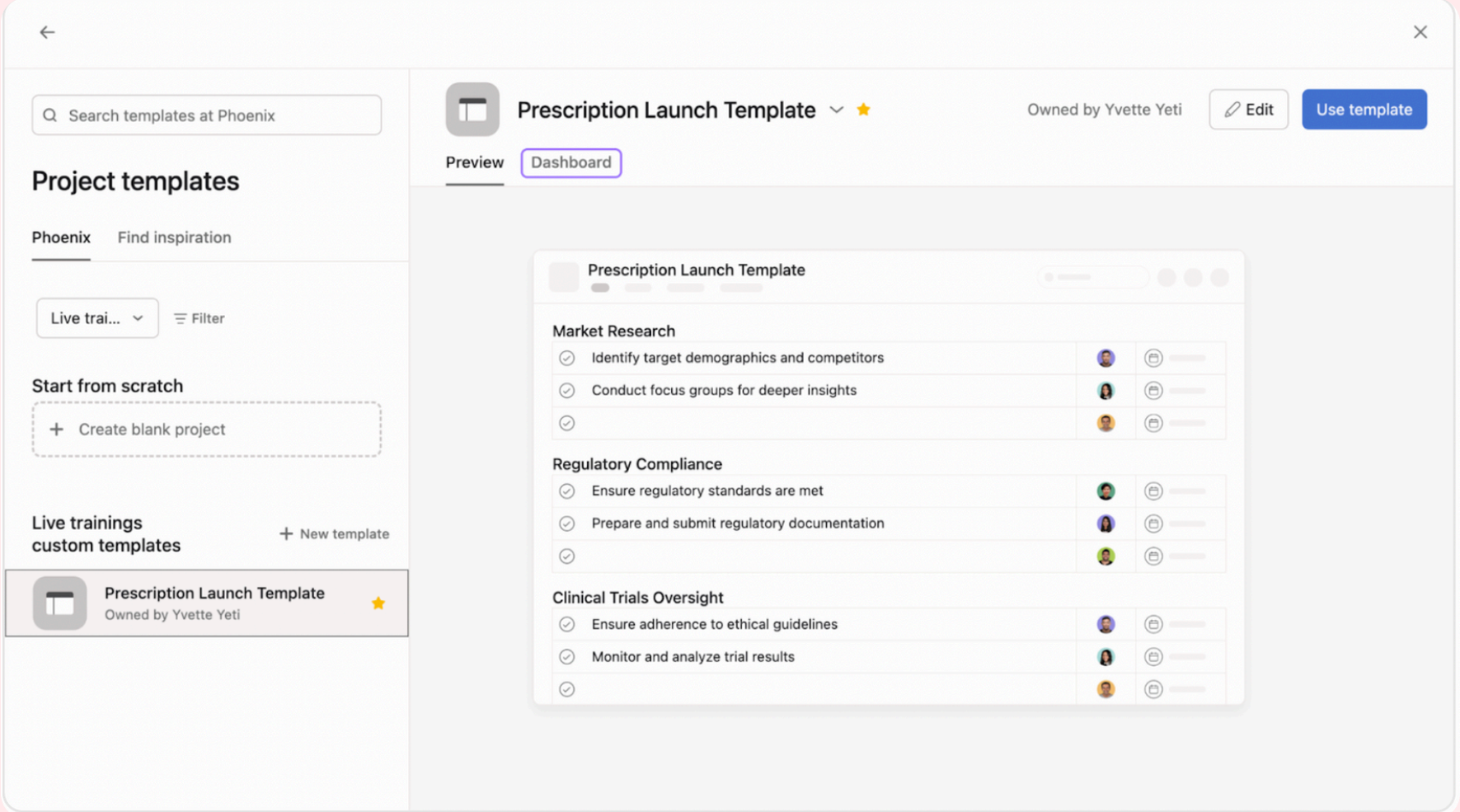
How it works

Use the dashboard to view where templates are applied, update templates centrally, and ensure projects are created with the latest configurations.

Portfolio management

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Portfolios

- ✓ **Portfolio saved views**
  Quickly surface key information with custom portfolio views

- ✓ **Portfolio rules**
  Save time and manage portfolio workflows at scale

- ✓ **Portfolio summary report enhancements**
  Create compelling executive summaries by exporting portfolio data to PDF

- ✓ **Portfolio access levels**
  Share portfolio content with others at the appropriate level of access

- ✓ **Portfolio archiving**
  Self-manage your portfolio usage

- ✓ **Formula custom field rollups**
  Track progress and manage resources by aggregating data across projects and portfolios
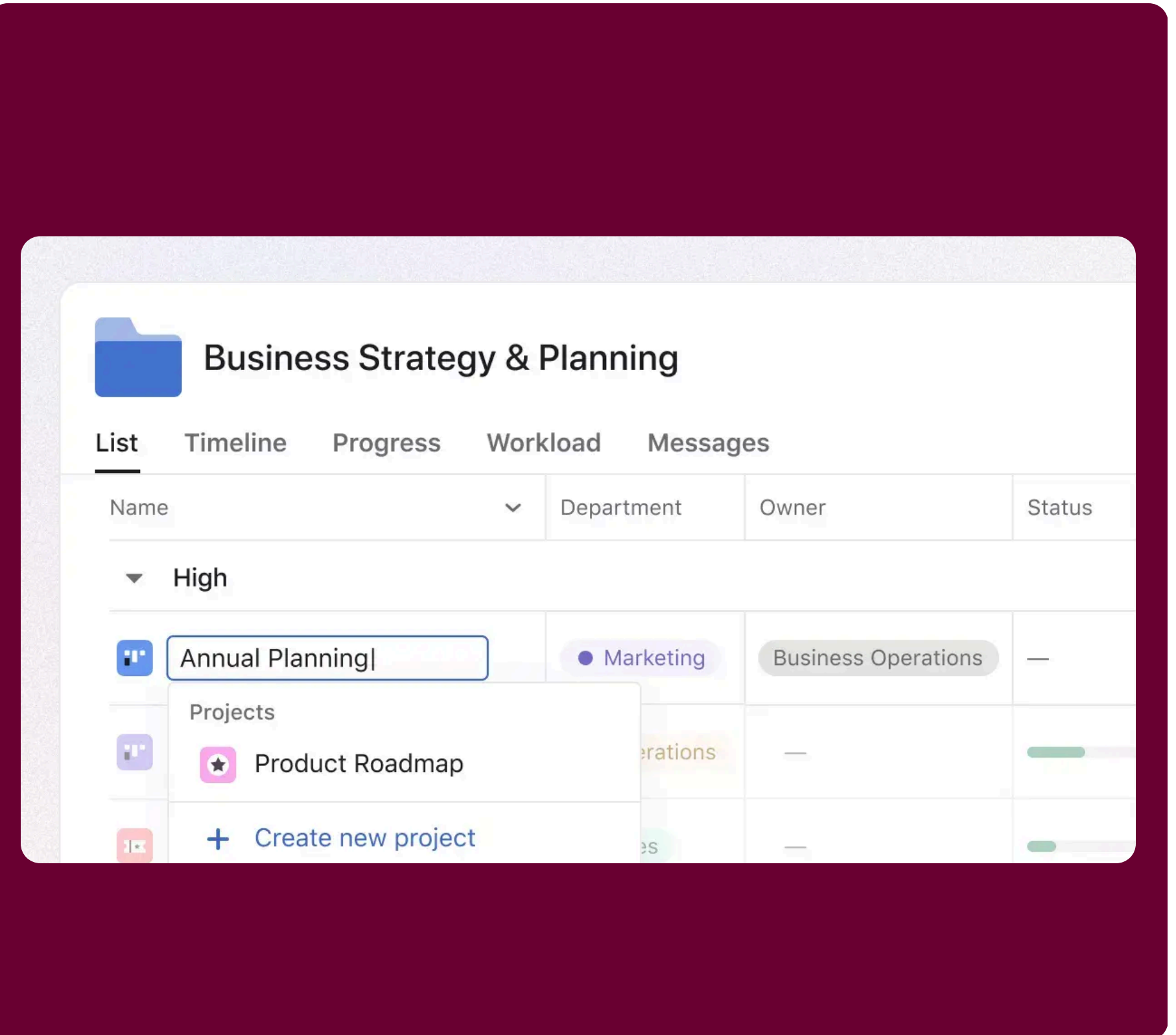
Surface key information quickly with custom portfolio views

Overview

Easily create and save custom portfolio views—whether in a list, timeline, or workload format—using filters and sorting options. Share these views with your team to stay aligned and focused on what matters most.

Key benefits

- Quickly access key information with saved custom views
- Monitor work efficiently with tailored filters and sorting
- Align teams by sharing relevant portfolio insights

Key use cases

- Portfolio management
- Strategic planning
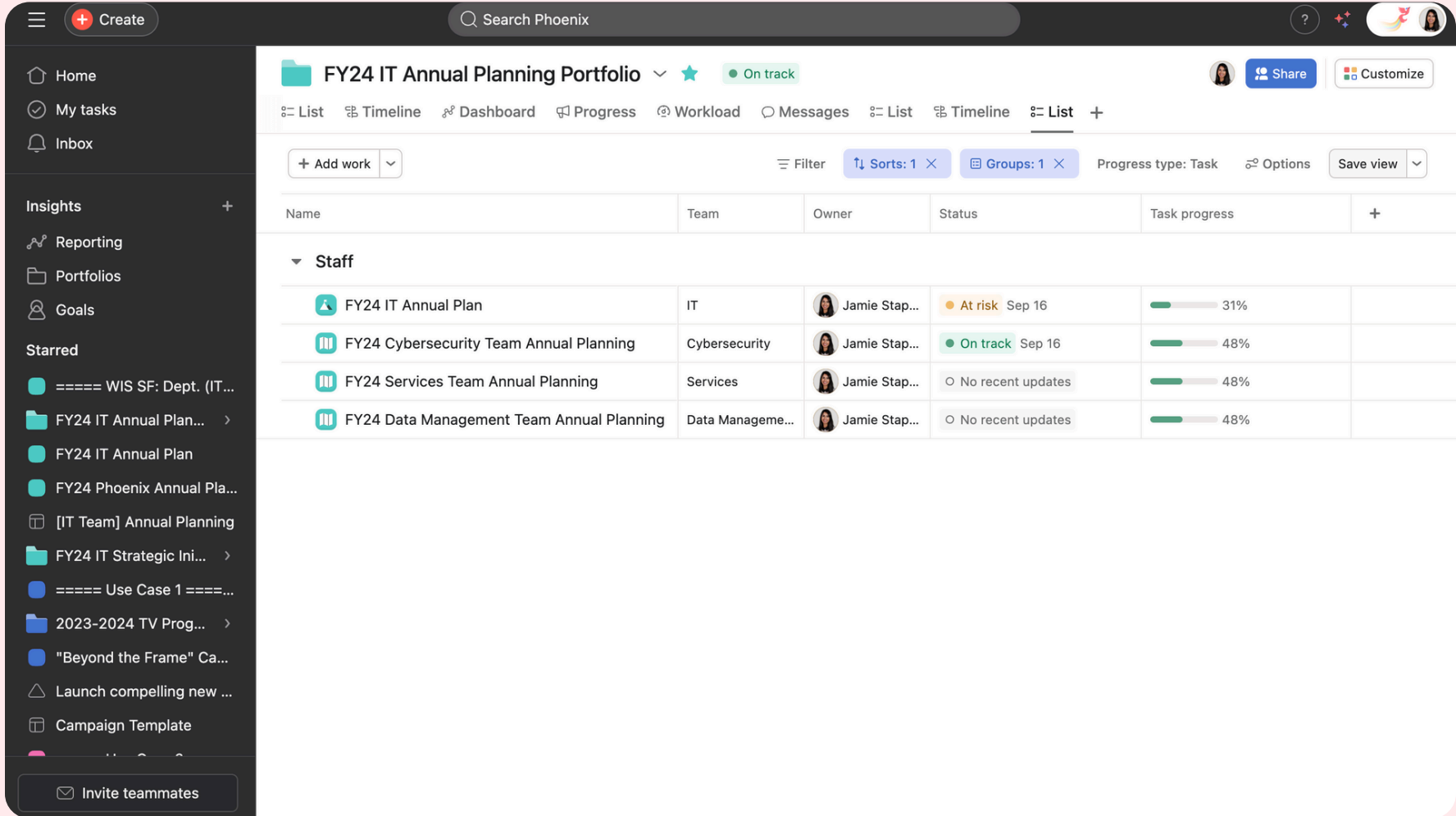
How it works

Filter and sort a portfolio to create your ideal view, then click "Save view" to set it as the default list tab for everyone. Use "+ Save as a new tab" to create a separate tab for this customized view.

Save time and manage portfolio workflows at scale with portfolio rules

Overview

Portfolio owners and members can easily create and customize portfolio rules, streamlining the curation, maintenance, and sharing of large portfolios with key stakeholders.

Key benefits

- Prioritize initiatives and allocate resources efficiently by automating portfolio workflows
- Save time and ensure your portfolios are up to date with the right data

Key use cases

- Portfolio management
- Strategic planning
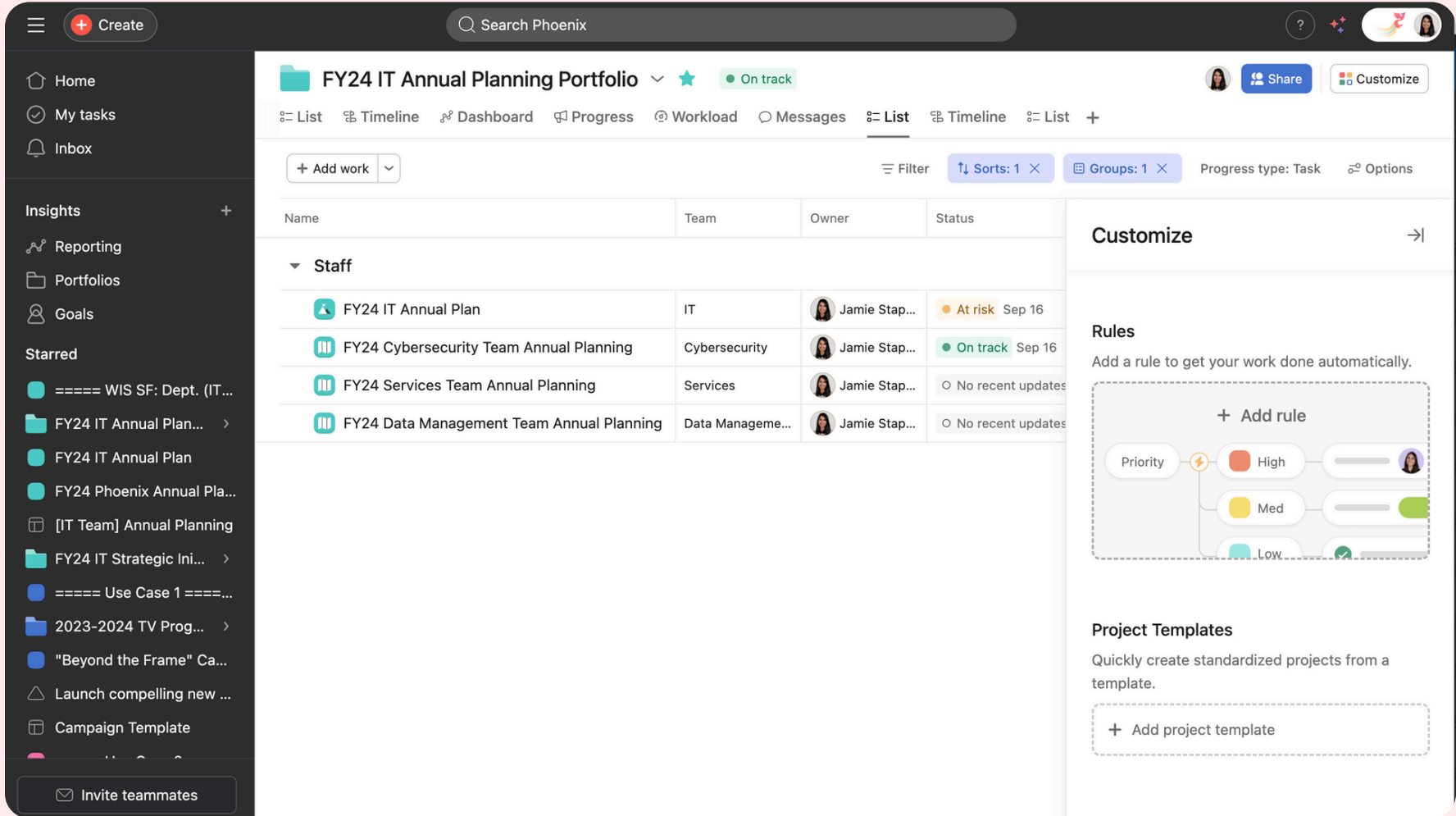
How it works

Click Customize in the top-right corner of your portfolio to set up rules that automate key actions and streamline project management. Each rule needs a trigger to activate it and an automatic action to follow.

Create compelling executive summaries by exporting portfolio data to PDF

Overview
The visual quality of portfolio PDF exports has been improved to enhance executive reporting. Updates include full-length status updates (removing the 500-character limit), domain logos, and a refined layout for a more polished presentation.

Key benefits
- Get visibility and insights into key initiatives across your organization
- Share status updates by exporting data in an executive-level format
- Save time and resources by seamlessly generating status reports

Key use cases
- Executive reporting
- Business reviews (MBRs, QBRs)
- Sharing status updates

FY24 IT Strategic Initiatives > PDF summary

New   Send feedback   Cancel   Download

PDF settings

○ Portrait
○ Landscape

Portfolio
☑ Show status
  ☑ Include status details
    ☑ Show all text
Include additional notes (optional)

Write something about this portfolio...

0/500 characters

Items in this portfolio
Filter or sort your portfolio list to include in this report
☑ Show status
  ☑ Include status details
    ☑ Show all text
☑ Show owner

Shown fields (max 5)   1/1 selected

On track   Oct 29, 2024

FY24 IT Strategic Initiatives
Portfolio owner: Jamie Staples

FY24 IT Strategic Initiatives: On Track with Focus on Q1 Planning and...   By Jamie Staples
Summary
Overview of projects in the FY24 IT Strategic Initiatives portfolio:

- Q3 IT Plans: Progressing as scheduled with ongoing activities in risk management, reporting, and execution phases. Key upcoming tasks include stakeholder meetings and system integration testing.
- Cloud-Based Infrastructure Project Tracker: No new updates to report since the last status update.

The FY24 IT Strategic Initiatives portfolio is currently on track, with the primary focus on the Q3 IT Plans project. The portfolio is in the early stages of execution, with significant emphasis on planning, risk management, and stakeholder engagement. Key activities are underway to establish a strong foundation for the upcoming quarters.

The portfolio's status reflects a proactive approach to project management, with tasks distributed across various team members to ensure comprehensive coverage of all project aspects. The current focus on risk identification and mitigation, coupled with detailed planning activities, positions the portfolio well for successful execution in the coming months.

To accelerate the team's ability to deliver customer value more quickly, consider:

1. Implementing agile methodologies to allow for more frequent deliverables and feedback cycles.
2. Enhancing cross-functional collaboration to streamline decision-making processes.
3. Investing in automation tools for routine tasks to free up resources for more value-added activities.

As we move forward, maintaining clear communication channels and regularly reassessing priorities will be crucial to adapting to any changing business needs and ensuring the portfolio continues to align with strategic objectives.

Current Blockers
As of the current update period (Oct 15-30, 2024), there are no significant blockers identified for the FY24 IT Strategic Initiatives portfolio. The projects within the portfolio appear to be progressing as planned. However, it's important to remain vigilant and proactive in identifying potential challenges that may arise.

Key points to consider:
- While no immediate blockers are present, the team should continue to monitor the progress of tasks in the Q3 IT Plans project, particularly those in the Risk Management and Monitoring & Control sections.
- The upcoming task Conduct Risk Assessment Workshops may reveal potential blockers or risks that need to be addressed promptly.

How it works
Click the drop-down arrow next to the portfolio name, select Export, and choose PDF summary to generate a polished, comprehensive portfolio report in PDF format.

Share portfolio content with others at the appropriate level of access

Overview
Customize portfolio access with distinct levels to share progress while maintaining control over content.
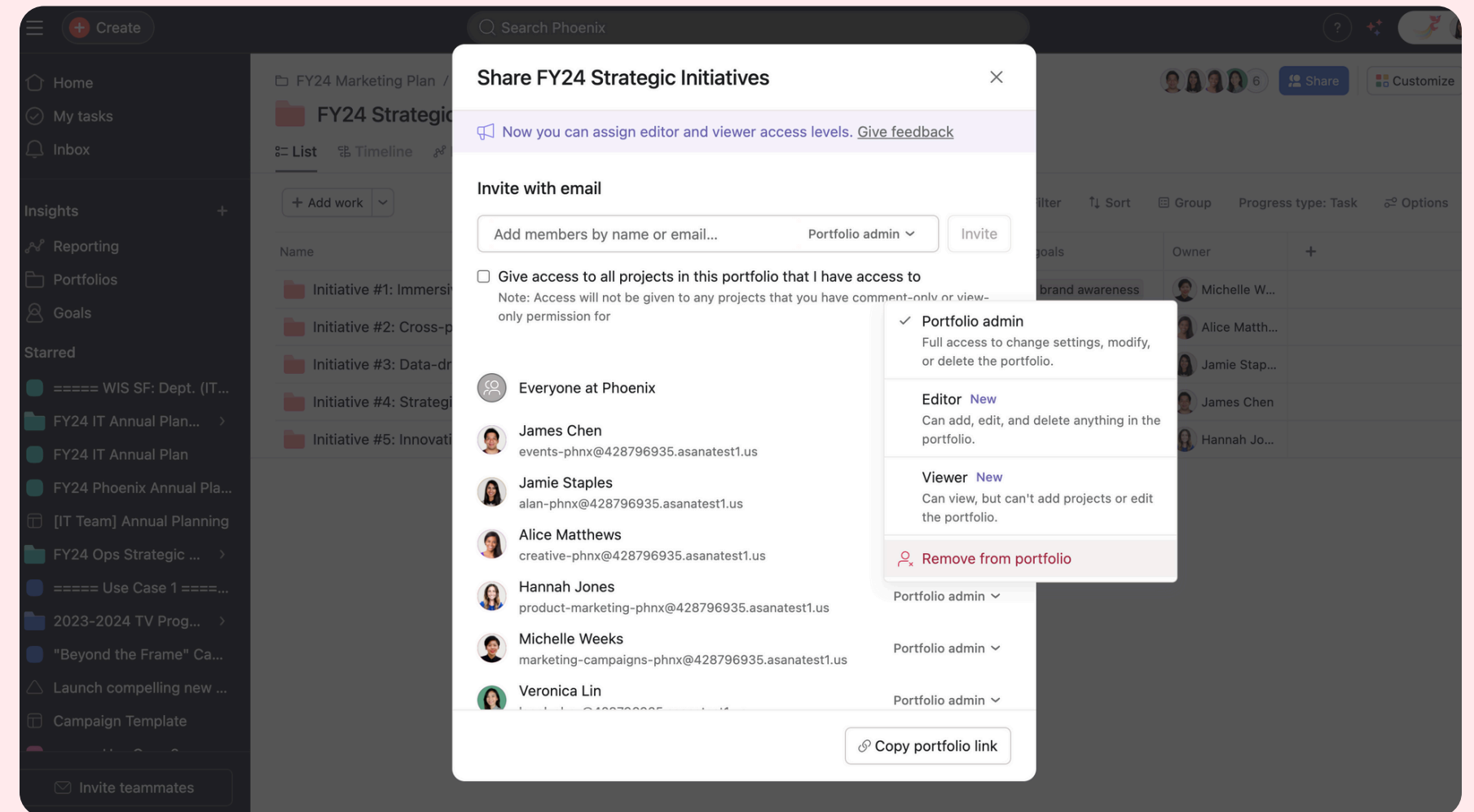
Key benefits
- Prevent unwanted changes by limiting stakeholder permissions
- Keep stakeholders informed with controlled visibility
- Enhance security with role-based access tailored to needs

Key use cases
- Portfolio management
- Stakeholder reporting

How it works
To set individual portfolio permissions in Asana, click Share in the portfolio and assign each user as a Viewer, Editor, or Portfolio admin.

Self-manage your portfolio usage with portfolio archiving

Overview
Archive inactive portfolios to manage usage efficiently and keep them for historical reference—archived portfolios won't count toward usage limits.
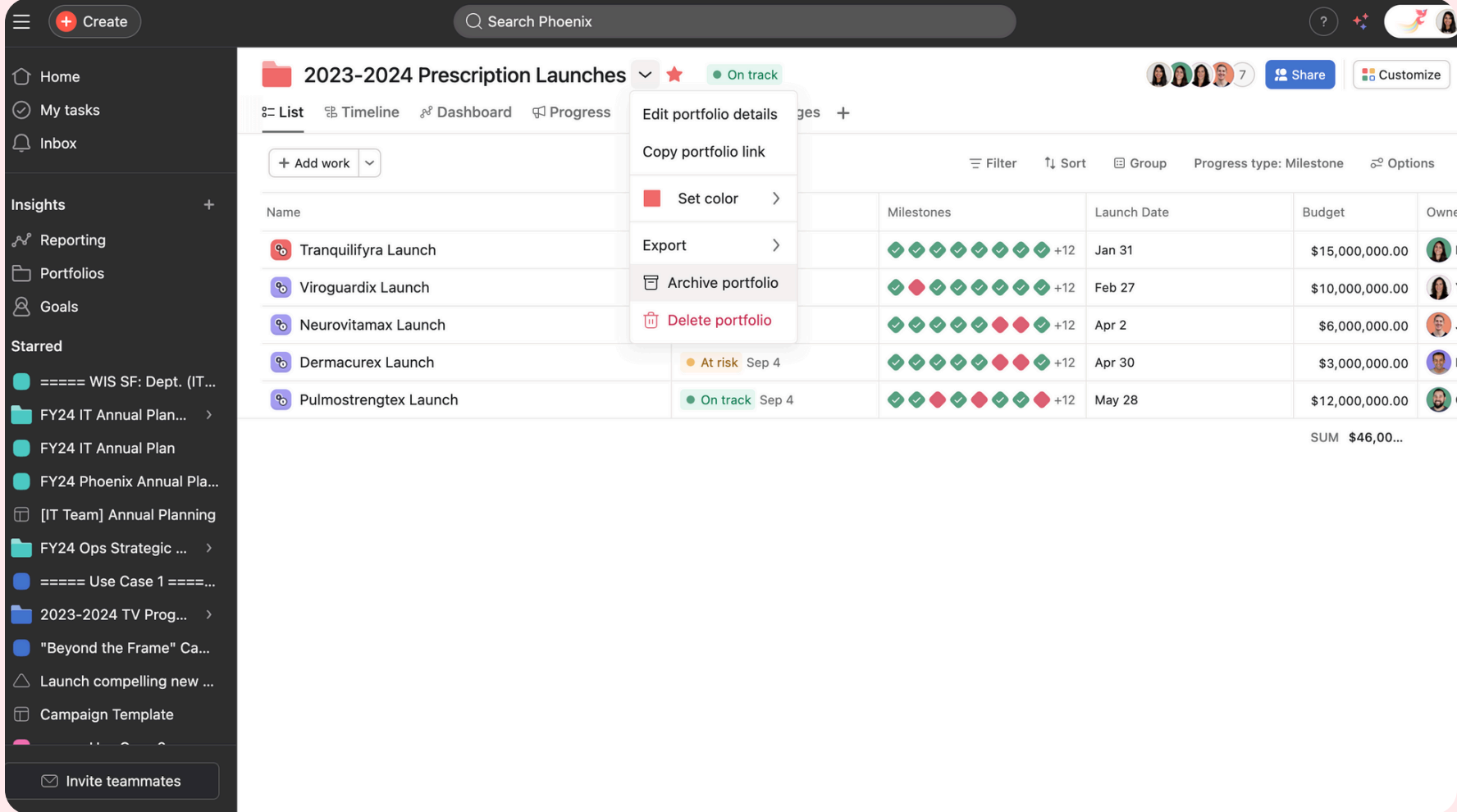
Key benefits
- Optimize usage limits by archiving inactive portfolios.
- Preserve historical data for future reference
- Stay organized by decluttering your portfolio view to focus on active work

Key use cases
- Portfolio management

How it works
To archive a portfolio, open the portfolio menu (from the portfolio page or by right-clicking the portfolio) and select "Archive.

Track progress and manage resources by aggregating data across projects and portfolios

Overview
Aggregate values from subtasks up to the portfolio level using the rollup function in formula custom fields. Calculate totals, averages, and key metrics across tasks to manage budgets, analyze sales, and calculate capacity efficiently.

Key benefits
- Streamline reporting by summarizing relevant data directly on project dashboards
- Gain actionable insights on key project and portfolio metrics for informed decision-making

Key use cases
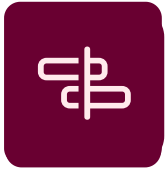- Progress tracking and reporting
- Resource management
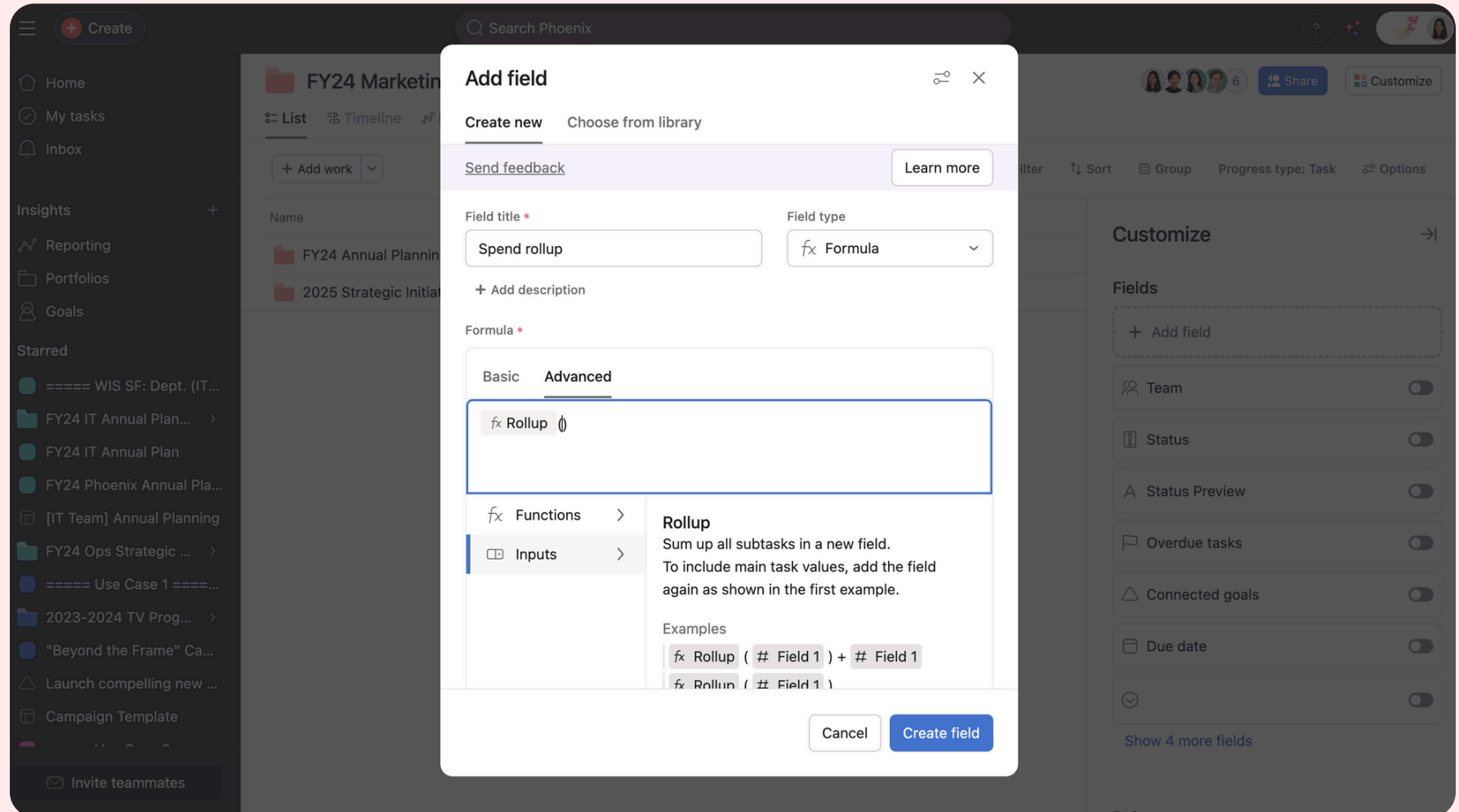
How it works
Add a formula custom field via the Customize menu or +Add field in the column header. Use basic operations like add, subtract, multiply, and divide to perform calculations.

Resource management

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Resource management

✓ ## Capacity plan filters
Make smarter resourcing decisions by filtering capacity plans with custom fields

Make smarter resourcing decisions by filtering capacity plans with custom fields

Overview
Now you can add filters to capacity plans to view staffing and capacity by custom fields such as priority, status, and due date.
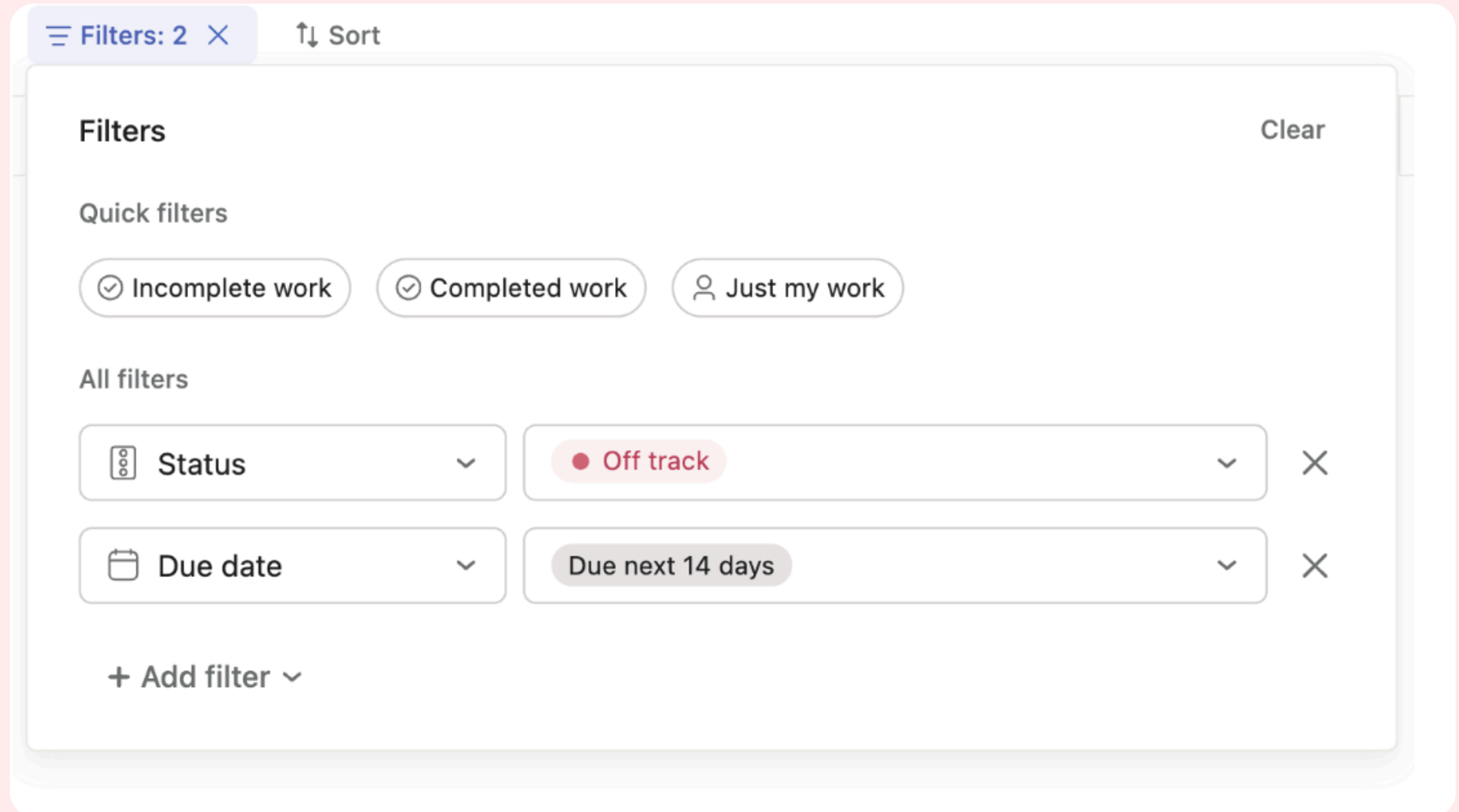
Key benefits
- Allocate resources accurately with filters for priority, status, or due date
- Ensure off-track projects get the support they need
- Plan effectively with clear visibility into deadlines and workloads

Key use cases
- Resource planning

Filters: 2 ✕   ↑↓ Sort

Filters   Clear

Quick filters

⊘ Incomplete work   ⊘ Completed work   ⍜ Just my work

All filters

| ⋮ Status ⌄ | ● Off track ⌄ | ✕ |
| 📅 Due date ⌄ | Due next 14 days ⌄ | ✕ |

+ Add filter ⌄

How it works
Use filters in the Projects or People tabs to narrow your view by custom fields.

Reporting

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Reporting

✓ **Smart charts**
Create reports for org-wide visibility

✓ **Ability to copy charts**
Easily copy charts from dashboards to slide decks and documents

✓ **Date histograms in stacked bar charts**
Visualize trends

✓ **Grouped bar charts**
Easily compare estimates and actuals

✓ **Burndown charts**
Better understand the health of your agile workflow

Create reports for org-wide visibility with smart charts

Overview
Generate charts with AI using just natural language, saving time and helping increase visibility across the organization.
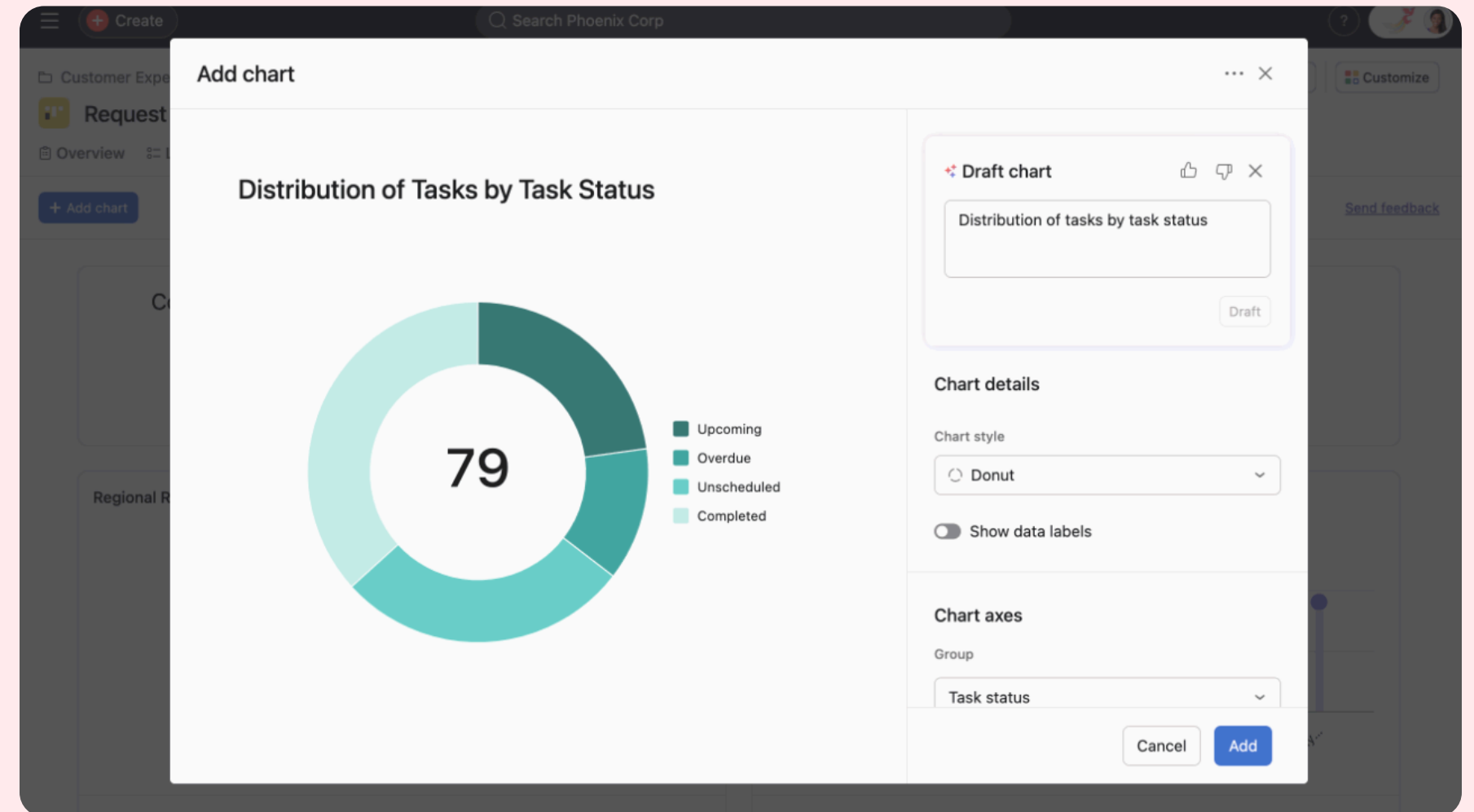
Key benefits
- Generate charts with natural language for real-time insights
- Save time with automated chart creation and customization
- Track trends and visualize metrics for better decisions

Key use cases
- Executive reporting
- Resource planning
- Strategic planning

How it works
Access Smart charts by navigating to the project dashboard tab and clicking "Charts". Simply type a metric in natural language, like "how many tasks did each member work on," and AI will generate relevant charts for quick insights.

Easily copy charts from dashboards to slide decks and documents

Overview
Paste charts from dashboards to external surfaces outside of Asana like slide decks and documents.
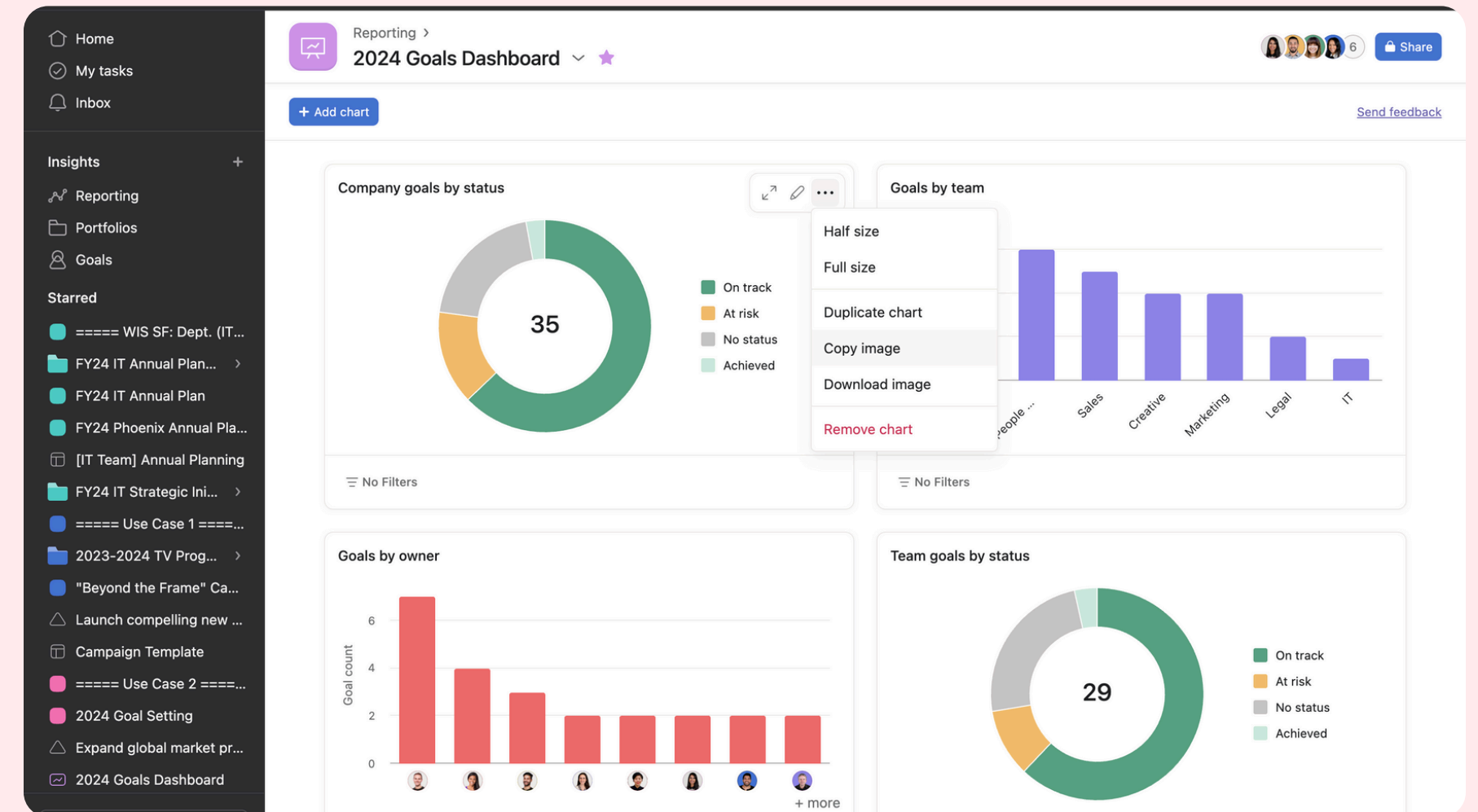
Key benefits
- Easily share charts outside of Asana without the need to recreate insights from scratch
- Save time by quickly duplicating and adapting data visualizations for easy use in presentations and documents

Key use cases
- Executive reporting
- Progress tracking
- Business reviews (MBRs, QBRs)

How it works
Navigate to a dashboard, click on the ellipses on a chart , and clicks on copy image. You can then paste it on an external surface with CMD+V.

Visualize trends with date histograms in stacked bar charts

Overview
Date histograms in stacked bar charts make it easy to track progress and visualize trends over time. Each bar represents a specific time range (e.g., days, weeks, or months) and is segmented to show key project details like subtasks or task statuses.
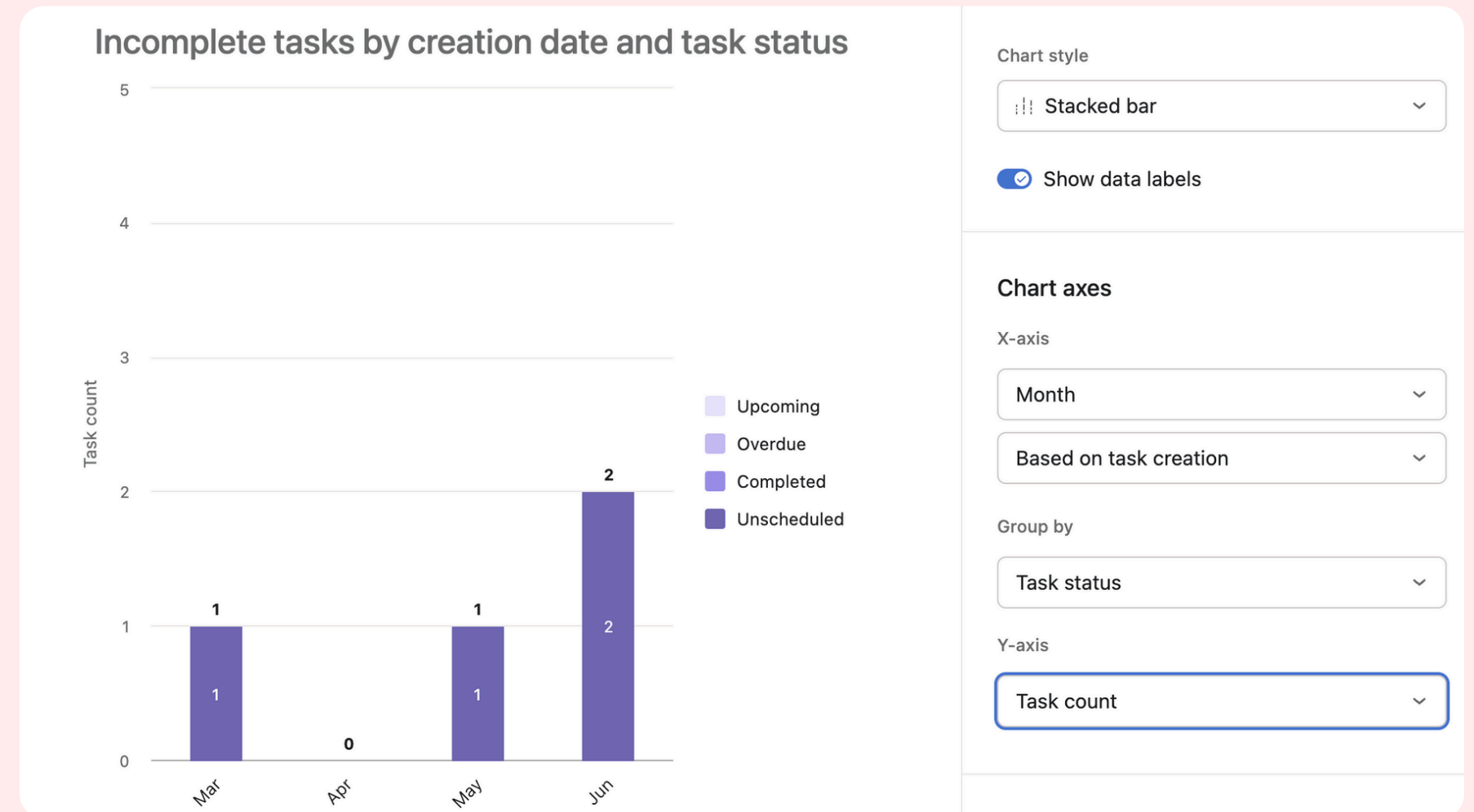
Key benefits
- Easily track progress with date histograms, seeing how tasks and subtasks impact your project timeline.
- Quickly spot trends and bottlenecks to make smarter decisions and plan proactively

Key use cases
- Progress tracking and reporting
- Resource allocation

How it works
To create a Date Histogram in a Stacked Bar Chart, navigate to the Charts view, choose 'Stacked Bar' as the display option, and select the date field (e.g., due date, creation date, or completion date).

Easily compare estimates and actuals with grouped bar charts

Overview
Grouped bar charts let you easily compare a primary field by grouping it with a secondary field along a single Y-axis, providing clear side-by-side comparisons of key data points.
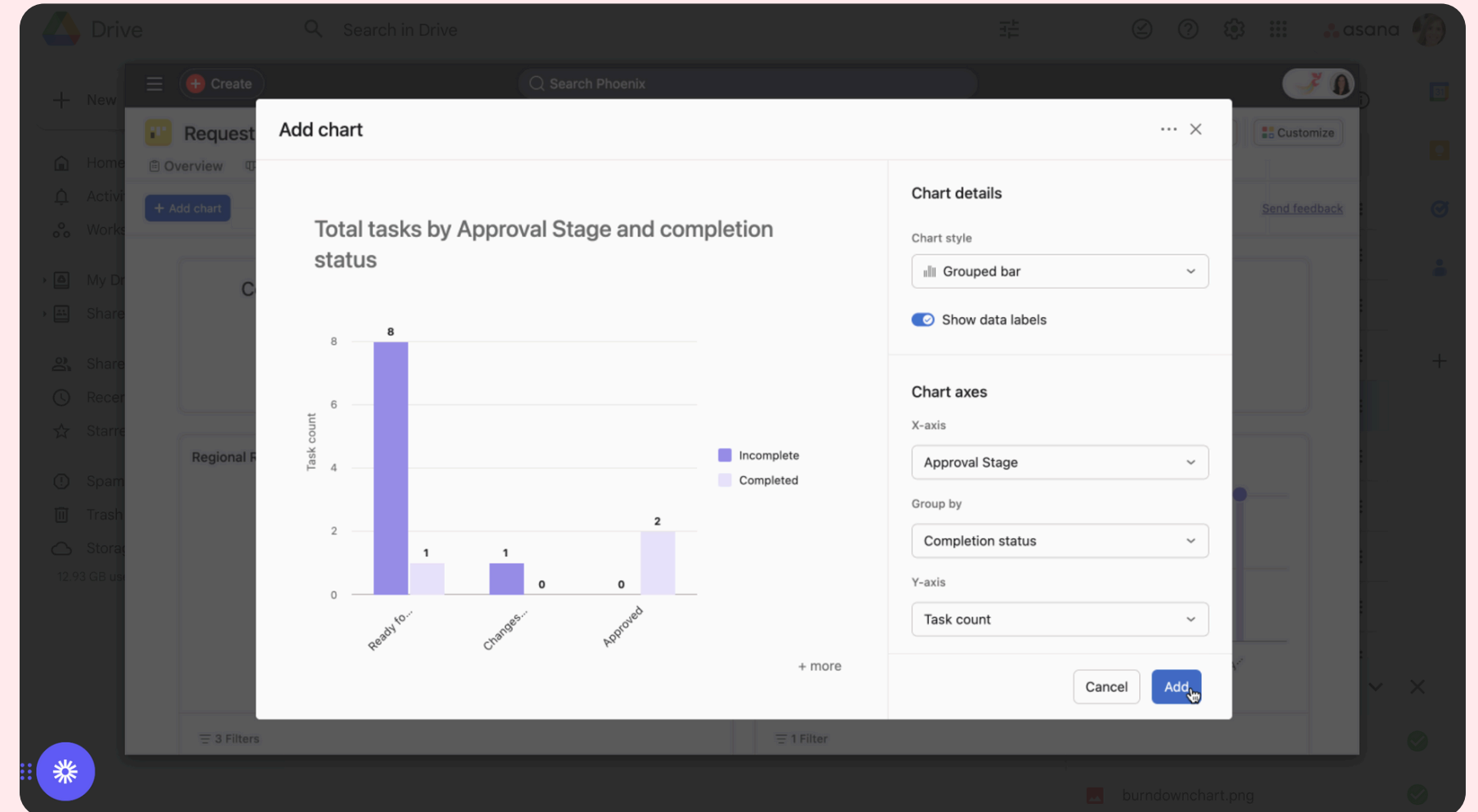
Key benefits
- Easily analyze performance across multiple categories in a single view, supporting better decision-making
- Identify trends and patterns to allocate resources strategically

Key use cases
- Resource allocation
- Budget tracking

How it works
In the Dashboard tab, select "Grouped Bar" as the chart type, choose fields for the X-axis and grouping, then pick a Y-axis metric. Customize your settings and click "Add."

Better understand the health of your agile workflow with burndown charts

Overview
Burndown Charts provide a visual of work remaining versus time, helping teams track progress, predict completion dates, and identify potential delays. They offer a clear breakdown of total and remaining tasks over a specific time horizon.
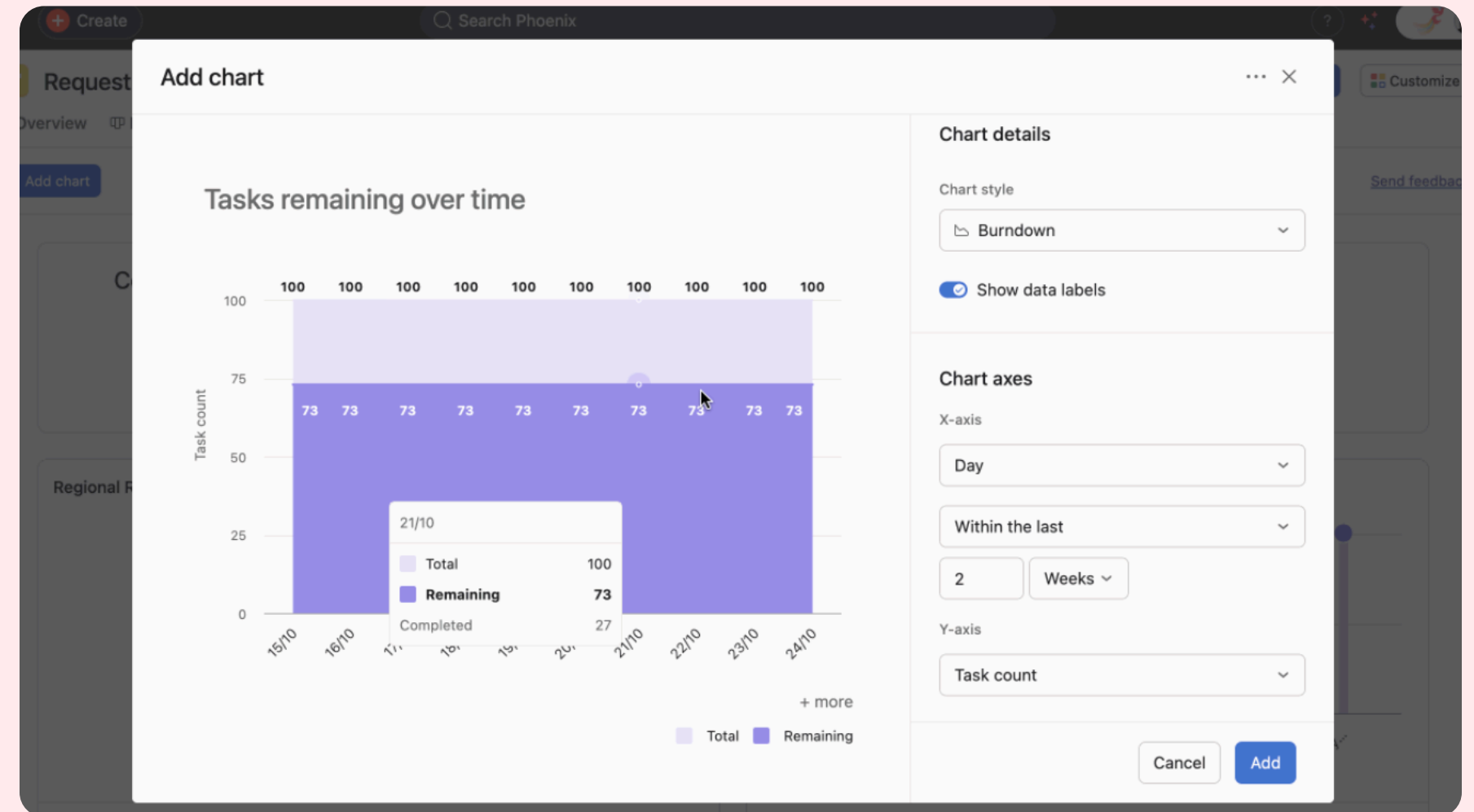
Key benefits
- Track progress visually with clear insights, making it easy to communicate against deadlines
- Improve forecasting by comparing completed work progress to anticipate bottlenecks and adjust plans
- Sync Jira Cloud data into Asana to create burndown charts

Key use cases
- Sprint planning
- Progress monitoring

How it works
Navigate to your project in Asana, click on the Progress tab, and select Burndown Chart from the available options.

Admin and security

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Admin and security

✓ Portfolio access levels

Share portfolio content with others at the appropriate level of access

Authentication

Google sign-in
Let members sign in with a Google account
Optional ›

SAML authentication
Required ›

Two-factor authentication
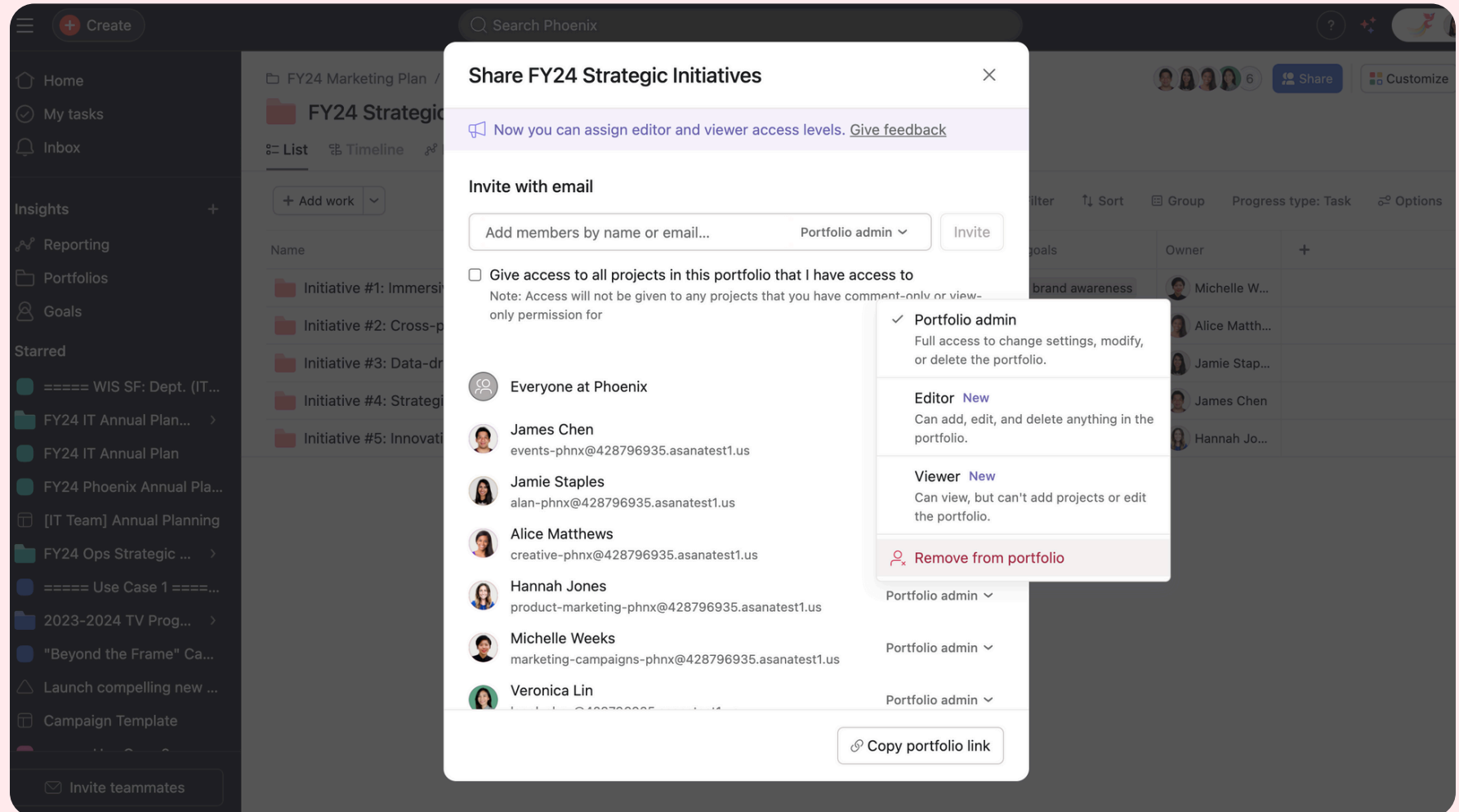Required ›

Session duration
Log out after 14 days ›

Share portfolio content with others at the appropriate level of access

Overview
Customize portfolio access with distinct levels to share progress while maintaining control over content.

Key benefits
- Prevent unwanted changes by limiting stakeholder permissions
- Keep stakeholders informed with controlled visibility
- Enhance security with role-based access tailored to needs

Key use cases
- Portfolio management
- Stakeholder reporting

How it works
To set individual portfolio permissions in Asana, click Share in the portfolio and assign each user as a Viewer, Editor, or Portfolio admin.

Integrations and API

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⚡ Integrations and API

✓ **Asana + MS Outlook Calendar**
Update teams on project plans

✓ **Salesforce data sync**
Streamline cross-team workflows with Salesforce data sync

✓ **Smart chat in Slack**
Surface insights and recommendations to accelerate work directly in Slack

Update teams on project plans in MS Outlook Calendars

Overview
Teams can schedule Outlook meetings from Asana, and with the new sync feature, events now update automatically to keep everyone aligned with the latest schedules and changes.
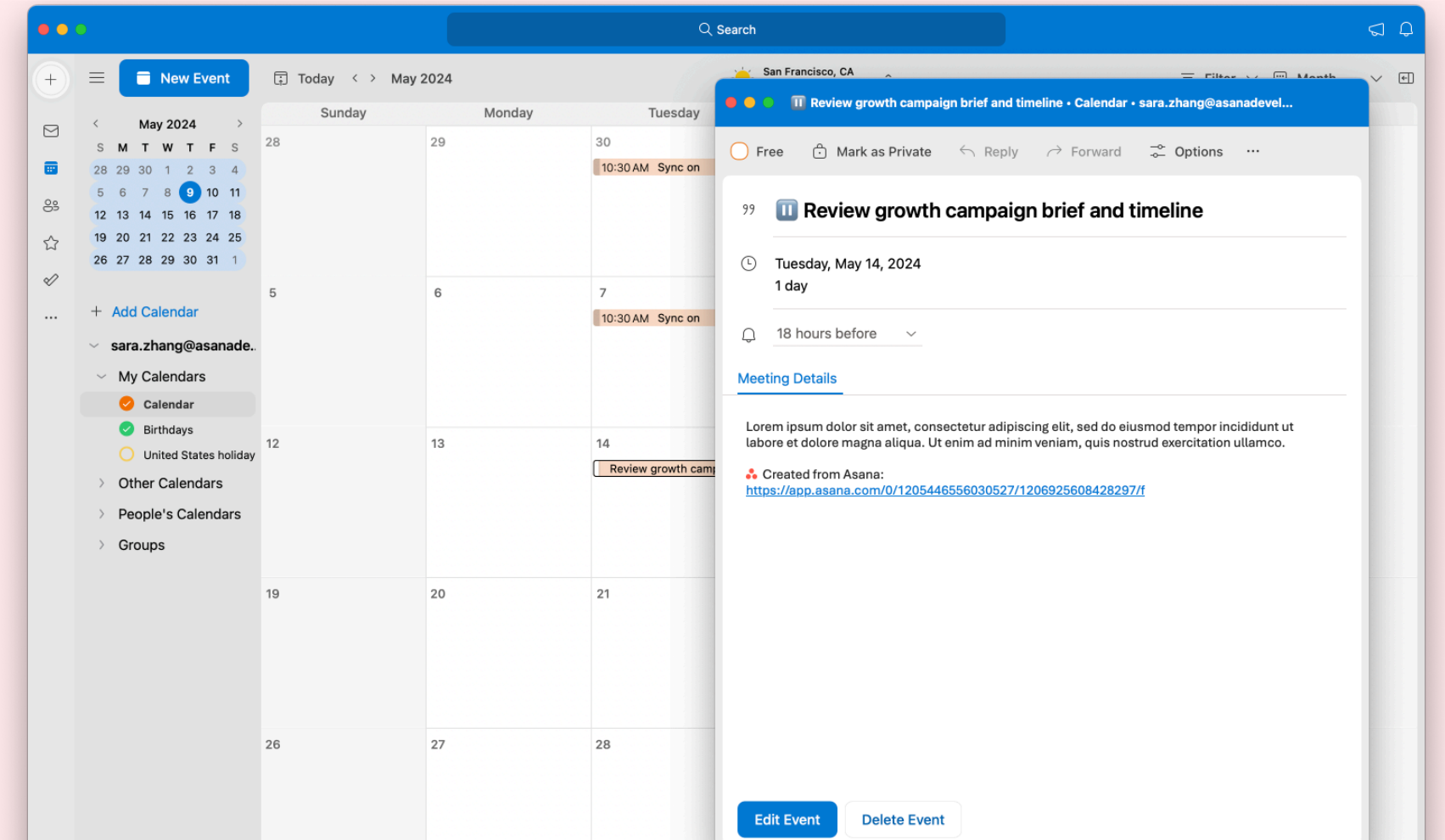
Key benefits
- Keep teams on track by syncing Asana task details to Microsoft Outlook Calendar
- Ensure productive meetings with automatic updates to key task details.

Key use cases
- Campaign planning
- Creative production
- Work intake

How it works
Go to Customize in your project or my tasks. Under Apps, search for and select Outlook Calendar. Then, use the Data Sync settings to configure how Asana and Outlook Calendar stay synced.

Streamline cross-team workflows with Salesforce data sync

Overview
Sync Salesforce data into Asana to build custom workflows and keep teams aligned with up-to-date information.
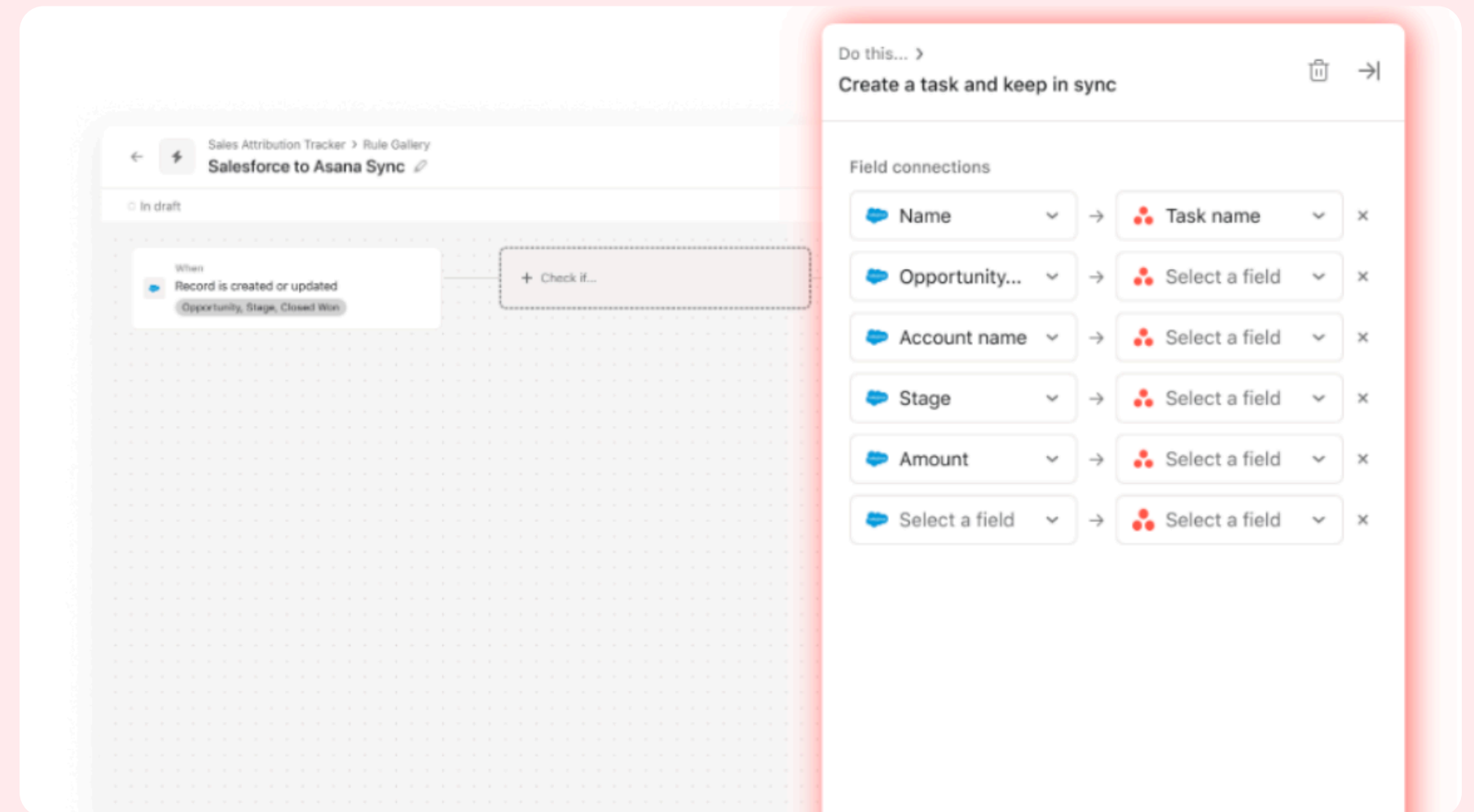
Key benefits
- Automate workflows with customizable rules that trigger Asana tasks based on Salesforce updates
- Improve coordination and execution by syncing Salesforce data with Asana in real-time
- Achieve business goals faster with streamlined sales and service workflows across teams

Key use cases
- Work intake
- Campaign planning
- Strategic planning

How it works
Use rules to trigger tasks based on Salesforce updates, automating workflows across teams. Map Salesforce fields to Asana tasks, and link records for seamless coordination and real-time updates.

Surface insights and recommendations to accelerate work with smart chat directly within Slack

Overview
Access AI chat directly within Slack to surface insights, recommendations, and project updates, helping teams stay focused without switching tools.
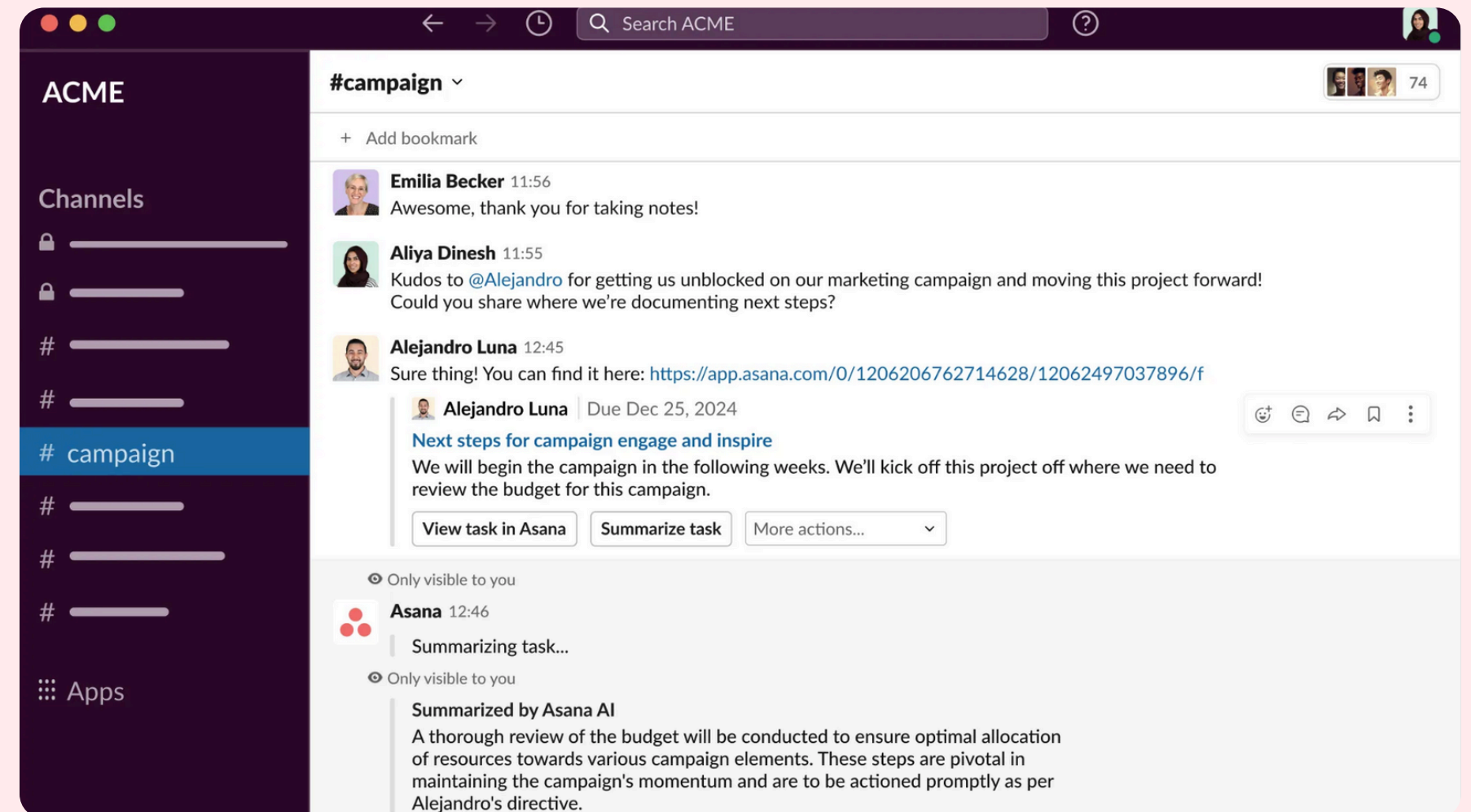
Key benefits
- Get immediate project summaries and updates to improve visibility
- Identify bottlenecks early to keep projects on track
- Surface AI-driven insights to prioritize high-impact tasks and accelerate work

Key use cases
- Work intake
- Resource planning
- Strategic planning
- Campaign management
- Creative production
- Product launches

How it works
To start, click the stardust icon near your profile photo in the top-right corner of Asana. Then, choose a suggested question or type your own—no complex prompts or prior LLM experience needed.

Asana AI

asana

Asana AI

✓ **Smart chat**
Surface insights and get help actioning work

✓ **Smart chat in Slack**
Surface insights and recommendations to accelerate work directly in Slack

✓ **Smart charts**
Create reports for org-wide visibility

✓ **AI Studio**
Design Smart workflows with no code

✓ **Smart summaries of projects**
Get up to speed on work

✓ **Smart summaries for tasks**
Stay up to date on the go

Surface insights and get help actioning work with smart chat

Overview
Smart chat can answer questions, take action, and help you across all of your work.

Key benefits
- Surface insights, such as summaries of work in progress, blockers, challenges, key trends, next steps, and more
- Offload busywork by letting smart chat create tasks, assign out tasks, and more
- Onboard onto Asana faster with in-product help and expert tips

Key use cases
- Work intake
- Resource planning
- Strategic planning
- Campaign management
- Creative production
- Product launches
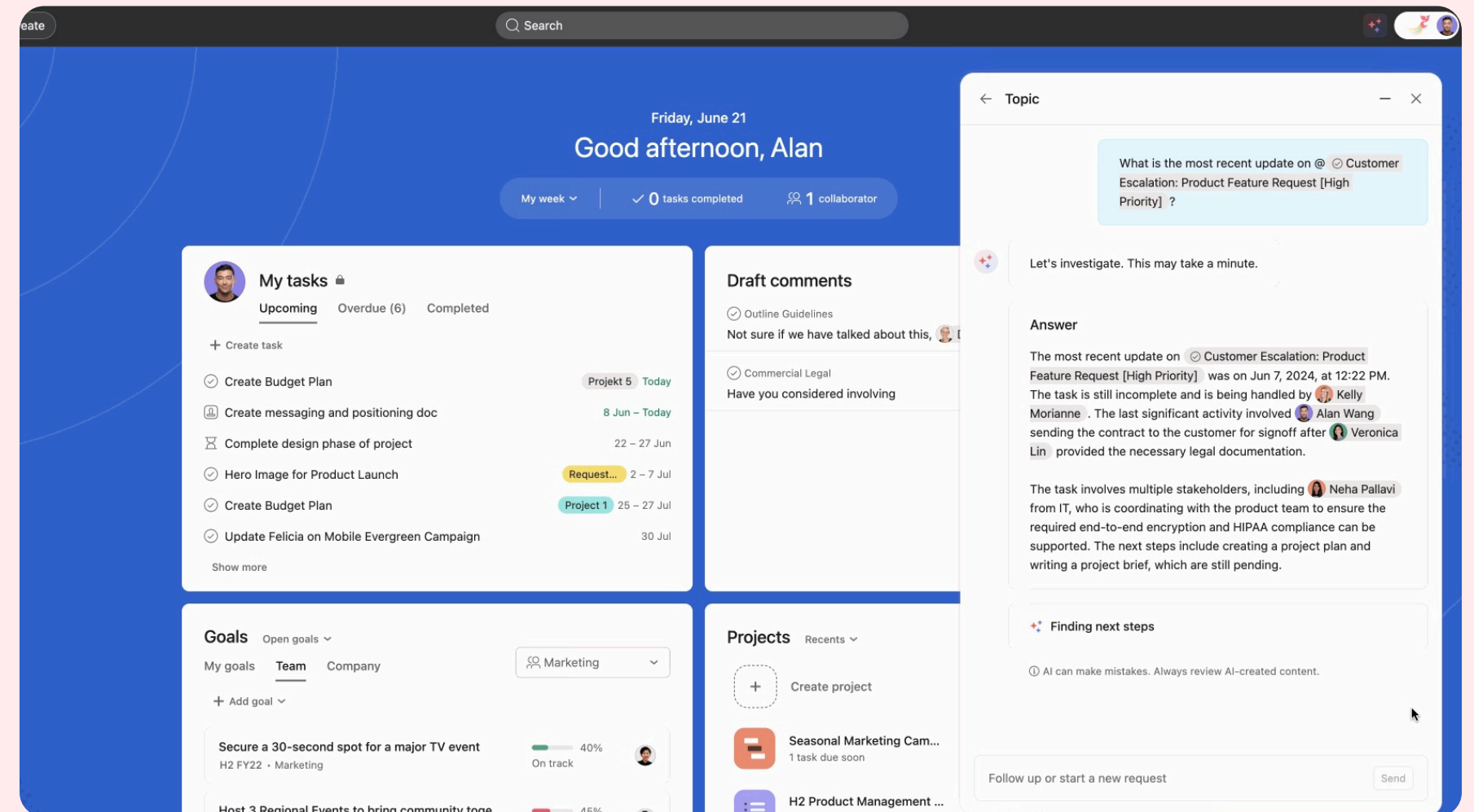
How it works
To start, click the stardust icon near your profile photo in the top-right corner of Asana. Then, choose a suggested question or type your own—no complex prompts or prior LLM experience needed.

Surface insights and recommendations to accelerate work with smart chat directly within Slack

Overview
Access AI chat directly within Slack to surface insights, recommendations, and project updates, helping teams stay focused without switching tools.
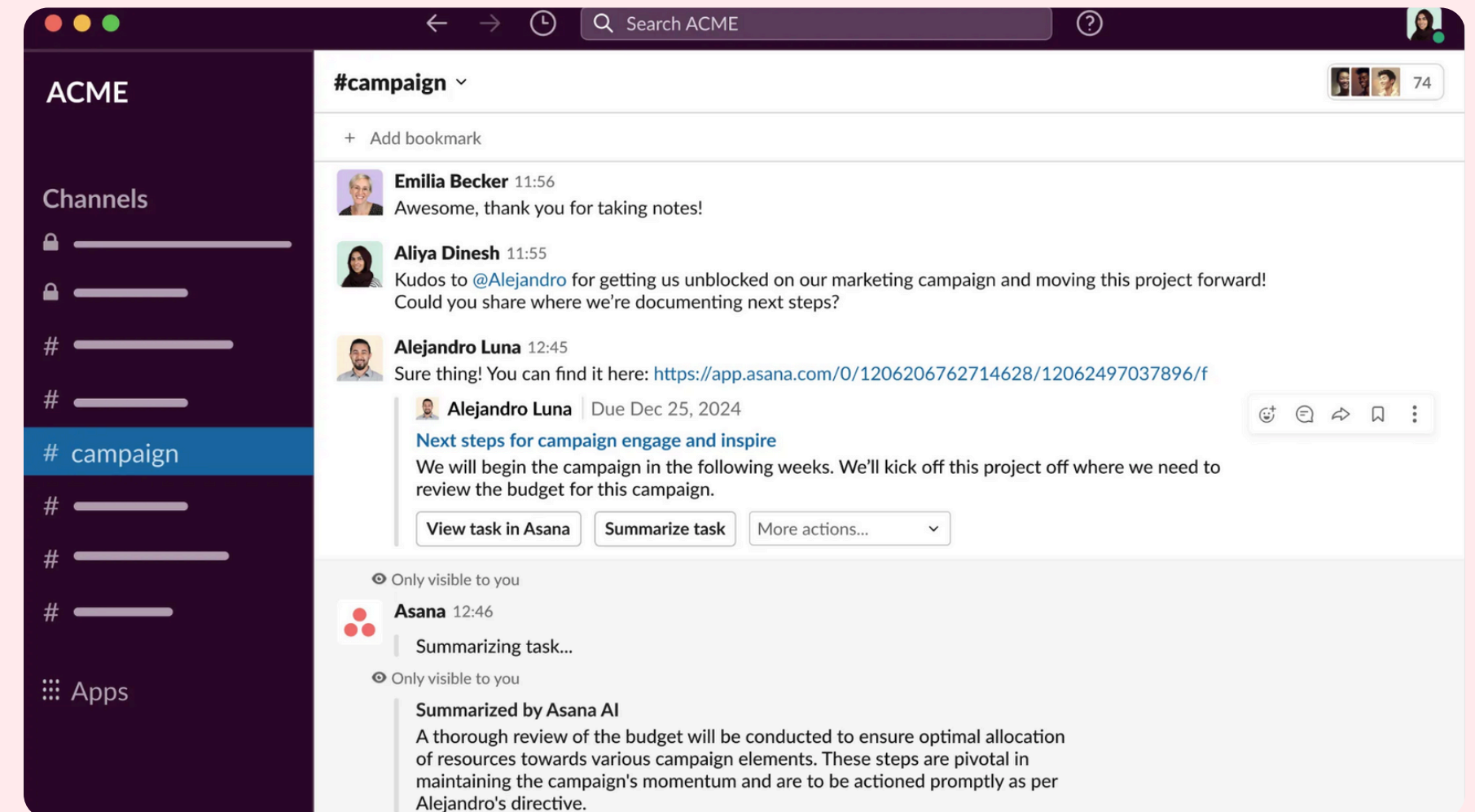
Key benefits
- Get immediate project summaries and updates to improve visibility
- Identify bottlenecks early to keep projects on track
- Surface AI-driven insights to prioritize high-impact tasks and accelerate work

Key use cases
- Work intake
- Resource planning
- Strategic planning
- Campaign management
- Creative production
- Product launches

How it works
To start, click the stardust icon near your profile photo in the top-right corner of Asana. Then, choose a suggested question or type your own—no complex prompts or prior LLM experience needed.

Create reports for org-wide visibility with smart charts

Overview
Generate charts with AI using just natural language, saving time and helping increase visibility across the organization.
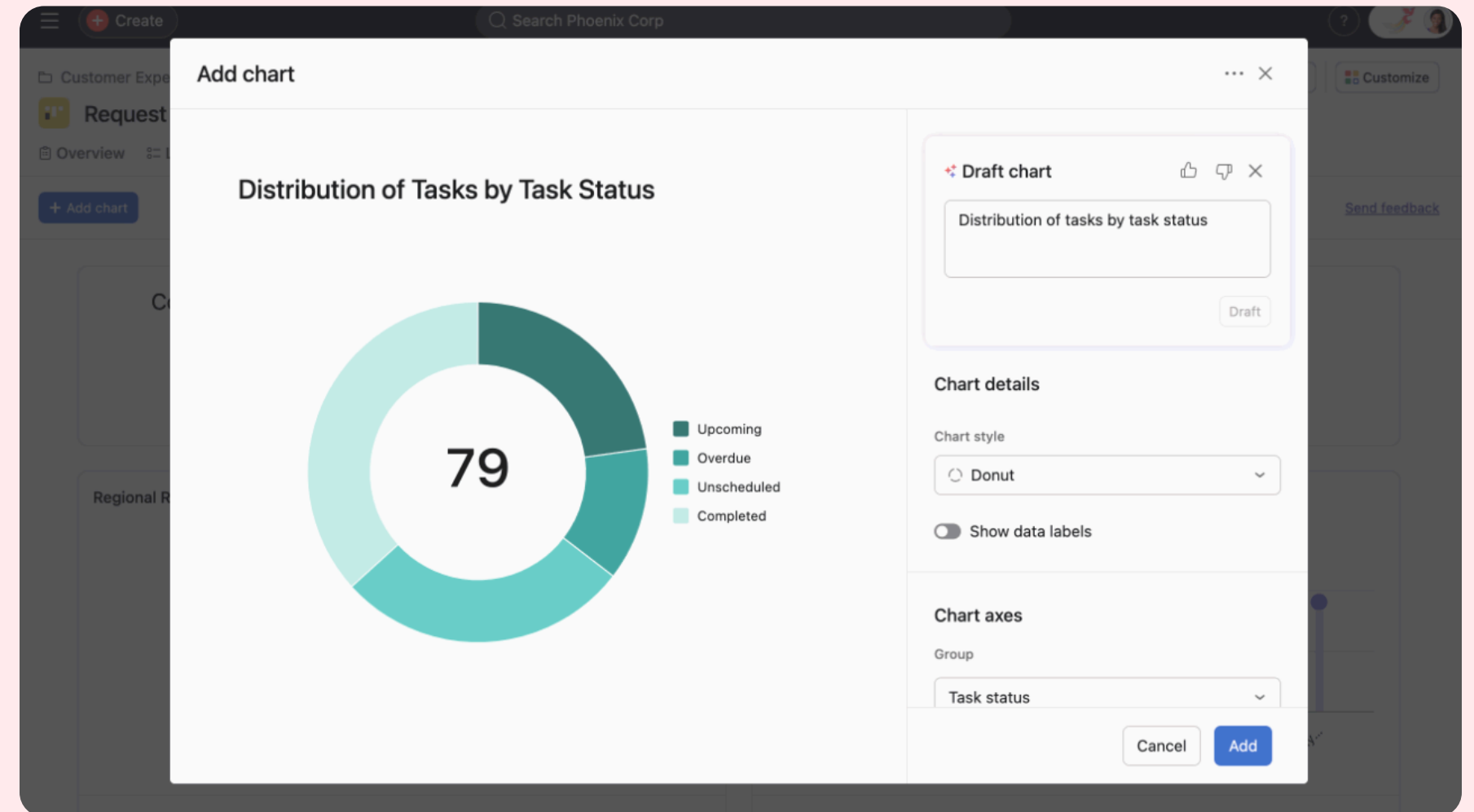
Key benefits
- Generate charts with natural language for real-time insights
- Save time with automated chart creation and customization
- Track trends and visualize metrics for better decisions

Key use cases
- Executive reporting
- Resource planning
- Strategic planning

How it works
Access Smart charts by navigating to the project dashboard tab and clicking "Charts". Simply type a metric in natural language, like "how many tasks did each member work on," and AI will generate relevant charts for quick insights.

Design smart workflows with no code in AI studio

Overview

With AI Studio, you can build workflows with AI agents to pass off your teams' busy work.

This feature is in Early Access, available exclusively to Enterprise and Enterprise+ customers under the new pricing tiers.
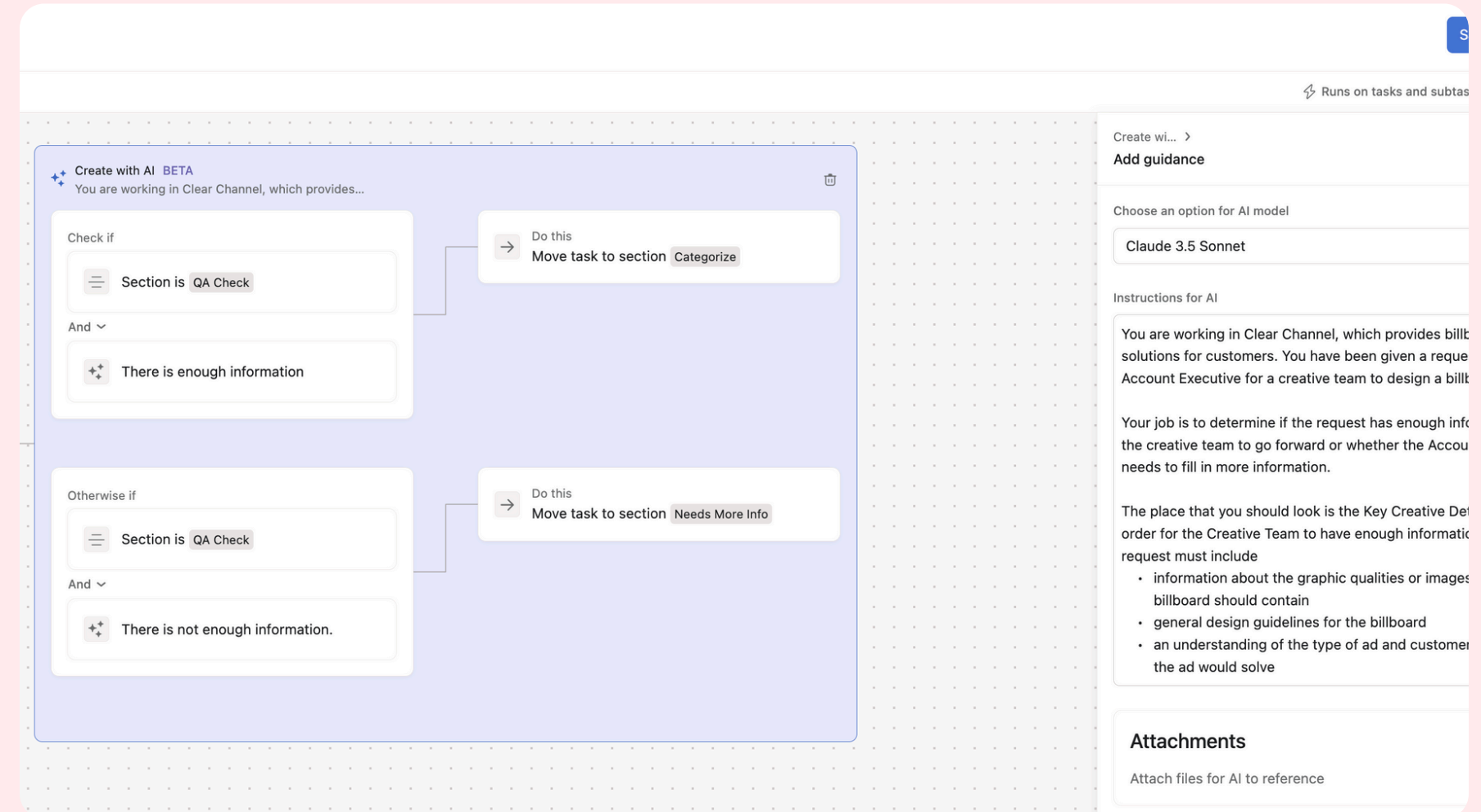
Key benefits

- Design any workflow
- Embed AI agents without code
- Deploy where your teams work

Key use cases

- Product launches
- Project intake
- Resource management

How it works

To use AI Studio, enable Asana AI features for your organization and grant access in the admin console. Then, create workflows by combining triggers, conditions, and actions, while using natural language instructions for complex logic.

Get up to speed on work with Smart summaries on projects for the mobile app

Overview
Smart summaries, already available on the web, are now on the mobile app, giving you quick insights to stay updated on team progress wherever you are.
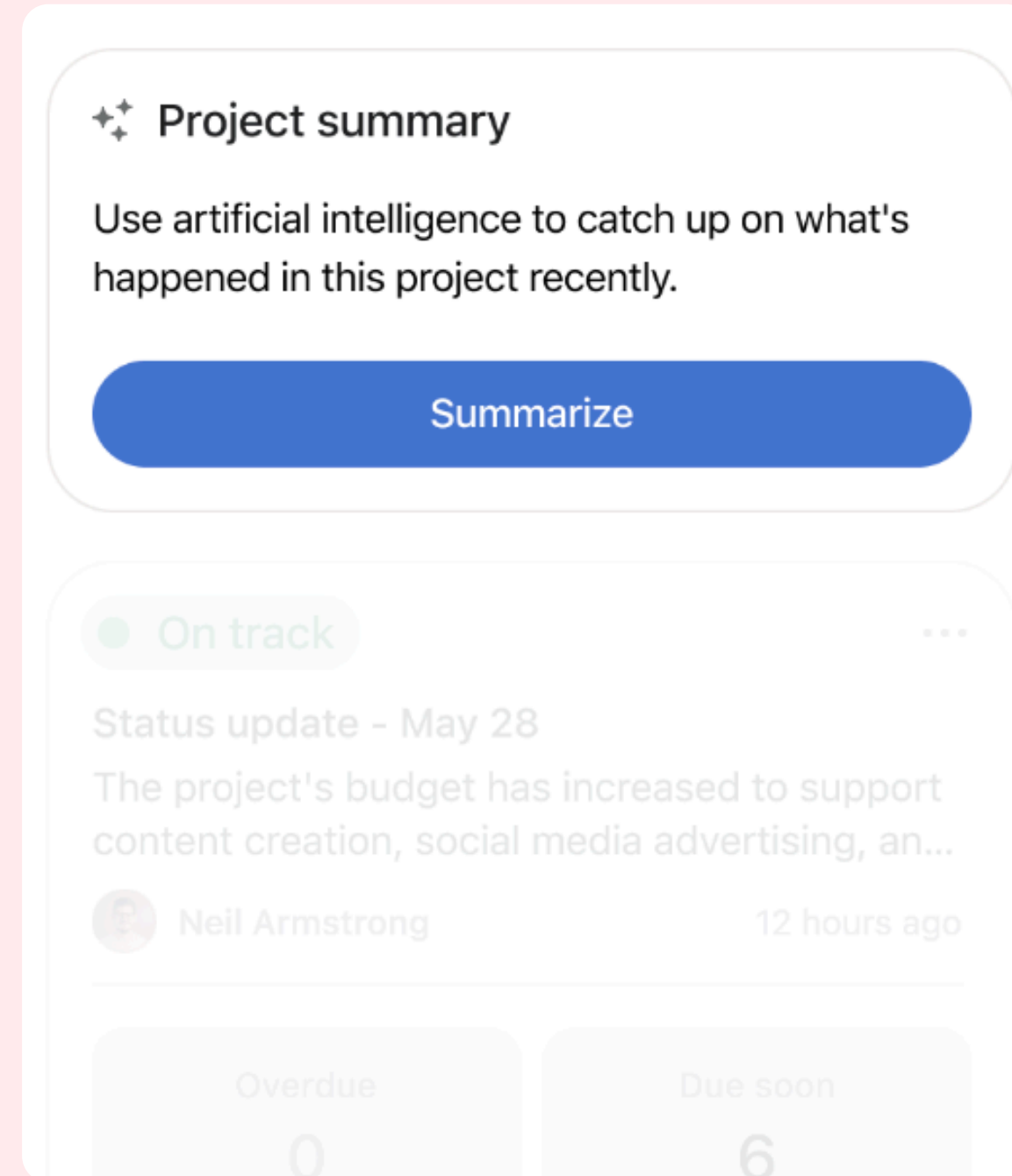
Key benefits
- Stay updated on the go with quick insights on mobile
- Save time with key updates at a glance
- Track progress easily with concise team summaries

Key use cases
- Progress tracking
- Status updates

✨ **Project summary**

Use artificial intelligence to catch up on what's happened in this project recently.

Summarize

● On track   ...

Status update - May 28

The project's budget has increased to support content creation, social media advertising, an...

👤 Neil Armstrong   12 hours ago

Overdue	Due soon
0	6

How it works
In the mobile app, open the Overview tab of your project and select View Summary. You'll receive a push notification or email once Asana AI generates the summary, with the option to regenerate it anytime.

Stay up to date on the go with Smart summaries for tasks on the mobile app

Overview
AI-powered task summaries are now available on mobile, providing quick insights by highlighting key content from tasks.
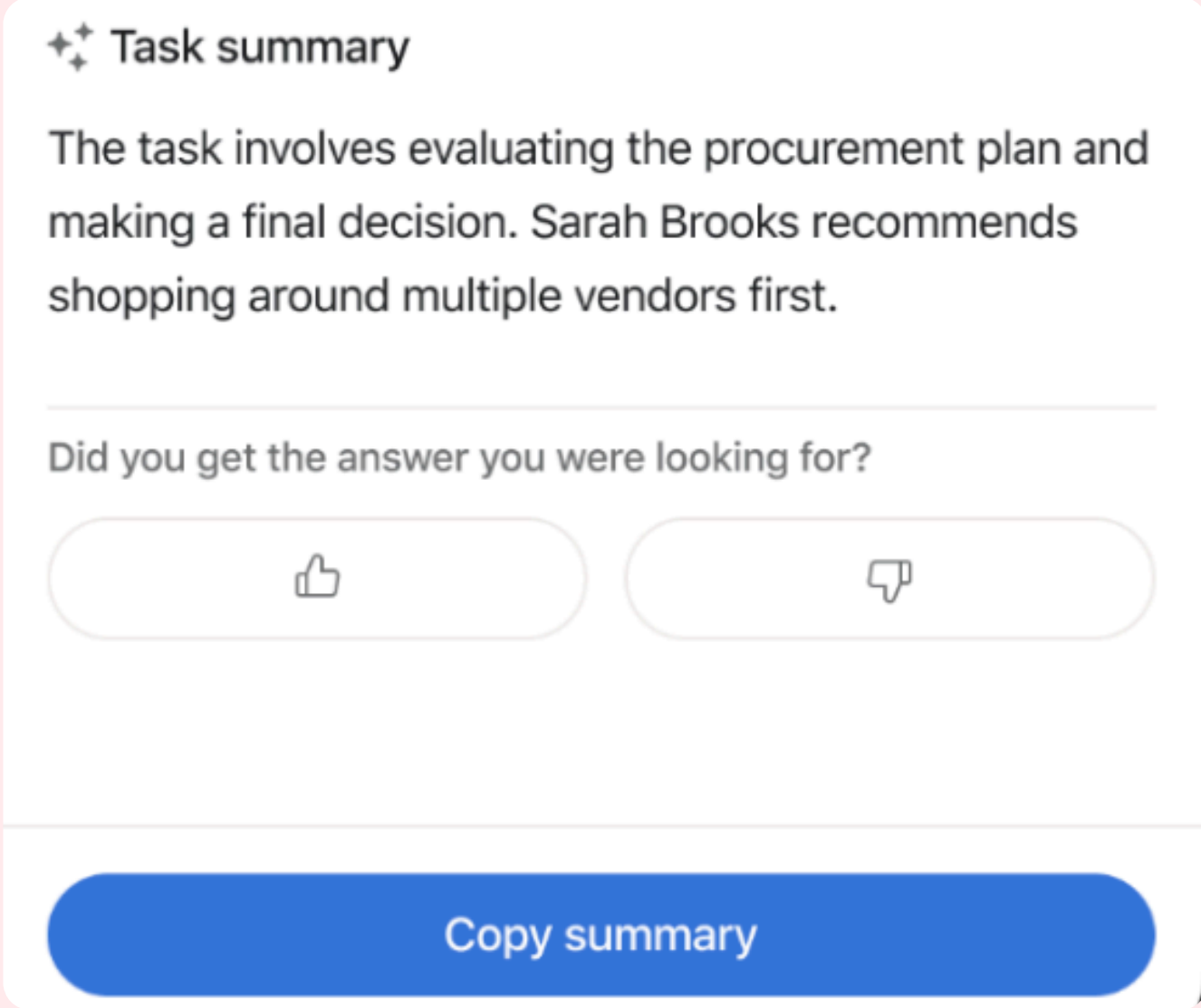
Key benefits
- Access quick context on the go without reviewing full task details
- Boost productivity by managing tasks seamlessly from your mobile device

Key use cases
- Personal productivity

✦ **Task summary**

The task involves evaluating the procurement plan and making a final decision. Sarah Brooks recommends shopping around multiple vendors first.

Did you get the answer you were looking for?

👍   👎

Copy summary

How it works
When accessing long tasks on mobile, Asana offers a prompt for an AI-powered summary, giving you quick insights and key takeaways.