Project & Task Management
Project & Task Management

- **Smart projects**
  - Kick-off projects effortlessly

- **Advanced dependencies**
  - Keep complex projects on schedule

- **“Viewer” project access level**
  - Share the right level of access with team members

- **Team sharing on projects**
  - Cascade relevant project information across teams

- **Custom field access levels**
  - Standardize data for more accurate reporting

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![ASANA 2023 Annual Planningcreenshot](ASANA 2023 Annual Planning.png)

- **In progress**
  - Map strategic questions
  - Analyze 2022 performance
  - Schedule kickoff

- **Complete**
Kick-off projects effortlessly with smart projects

**Overview**
Remove the writer's block from project creation by letting AI create projects for you.

**Key benefits**
- Quickly go from idea to execution with smart projects built for you
- Focus on the work itself and leave the structuring to Asana AI

**Key use cases**
- Work intake
- Creative production
- Content calendar management
- Product launches
- New hire onboarding

**How it works**
When creating a new blank project, add a project name and let AI set up the right project structure
Keep complex projects on schedule with advanced dependencies

Overview
Dependencies show the relationships between tasks and the sequence in which they should be performed.

We’ve added three more dependency types: finish-to-finish, start-to-start, and start-to-finish.

Key benefits
- Map different types of relationships between tasks to keep projects on schedule

Key use cases
- Adding different types of dependencies to interrelated tasks

How it works
At the task level, you can map dependencies such as finish-to-finish, start-to-start, and start-to-finish, in addition to finish-to-start dependencies.
Share the right level of access with team members by using "viewer" project access level

**Overview**
Allow “viewer” level permissions for project members who need to view project details without the ability to make edits to the project.

**Key benefits**
- Ensures project integrity by preventing unauthorized edits
- Keep stakeholders informed and aligned without the risk of unintended changes

**Key use cases**
- Stakeholder updates
- Training and onboarding
- Cross-department collaboration

**How it works**
Viewer access on projects allows team members or stakeholders to stay informed on progress without editing, ensuring data integrity and alignment.
Cascade relevant information across your organization with team sharing on projects

Overview
Share projects with groups of users at appropriate permission levels. Once shared, these teams can get project notifications.

Key benefits
- Add precise groups of people to a project in just a few clicks
- Easily right-size permissions for groups of users

Key use cases
- Sharing projects with entire teams quickly
- Adding multiple teams to projects

How it works
Share a project with up to 10 teams in Asana by clicking the share button on a project and choosing the access level for each team.
Standardize data for more accurate reporting with custom field access levels

Overview
Custom fields power your workflows and reports. Now you have greater control over who can set up and edit the details of custom fields.

Key benefits
- Control who can edit the details and settings of a custom field
- Limit custom field configuration to specific users
- Improve reporting accuracy with better data integrity

Key use cases
- Granting and limiting access to select custom fields

How it works
This update allows users to determine who can edit the details and settings of a custom field.
Workflows & Automations

- **Smart rules**
  Build and automate your operations faster

- **Bundles duplication**
  Save time and standardize workflows

- **Bundles dashboard multi-select**
  Scale process updates faster
Build and automate your operations faster with smart rules

Overview
Give AI a few simple instructions and it will create rules for you. No more wrestling with triggers, conditions, and actions – simply write what you would like to automate, and let AI handle the rest.

Key benefits
- Create rules to automate work with a few simple words

Key use cases
- Automating processes and reducing manual work
- Work intake
- Creative production
- Product launches
- New hire onboarding

How it works
From the customize menu in a project, you can select “create a custom rule or workflow” and then provide a few simple words for AI to generate a draft.
Duplicate bundles to save time and standardize workflows

Overview
Build and standardize workflows at scale by duplicating from existing bundles vs. creating from scratch.

Bundles are a powerful way of combining key workflow components like rules, custom fields, task templates, and sections and applying them across projects and portfolios at scale. You can push out updates en masse to ongoing projects. The ability to duplicate bundles now makes it easier to build out and standardize workflows.

Key benefits
- Standardize processes
- Consistency in reporting (i.e., custom fields in bundles)

Key use cases
- Work intake
- Strategic planning
- Campaign management
- Product launch

How it works
Navigate to your project and open the customize menu. Go into “bundles” under the add section. Select an existing bundle (or create your own), and proceed into the ‘preview tab’ of the bundles dashboard to duplicate.
Overview
Manage ongoing processes and projects with the ability to remove a bundle from multiple projects

Key benefits
- Standardize processes
- Consistency in reporting (i.e. custom fields in bundles)

Key use cases
- Work intake
- Strategic planning
- Campaign management
- Product launch

How it works
Navigate to your project and open the customize menu. Click into "bundles" under the add section. Select an existing bundle (or create your own), and proceed into the bundles dashboard. You can view all the projects the bundle has been applied to. Simply select all the projects you wish to remove the bundle from, and click remove bundle.
Portfolio Management
Portfolios

- **Portfolio summary report (PDF export)**
  Quickly generate a summary and status of key initiatives in an executive-level PDF format

- **Smart summaries on portfolios**
  Get up to speed on notable changes in a portfolio

- **Portfolio multi-filter and multi-sort**
  Monitor key initiatives with new portfolio views

![Business Strategy & Planning](image.png)
Generate a summary of key initiatives in an executive-level PDF format

Overview
Executives can make data-driven decisions faster and drive better business outcomes by having access to key data and information promptly in a digestible PDF format. Stakeholders can share the most up-to-date information on status with executives who aren't in Asana.

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
- Sharing status updates
- Monthly or quarterly business reviews
- Executive briefings

How it works
The PDF export includes status information for each component within the portfolio, including additional notes and status updates from parent and child portfolio components.
Get up to speed on notable changes with smart summaries for portfolios

Overview
Get a summary of what’s happened in a portfolio so you can stay up-to-date on the latest.

Key benefits
- Reduce time spent getting updated on projects
- Easily understand next steps to move key initiatives forward

Key use cases
- Get updated on portfolios immediately, regardless of whether owners have posted status updates

How it works
From the progress tab on a portfolio, you can request an AI update on notable changes since you last visited the portfolio. AI will review information within the portfolio and surface key insights for your review.
Monitor key initiatives with new portfolio views

**Overview**
Easily review, analyze, and drill down into your portfolio data to quickly get actionable insights and make faster decisions.

**Key benefits**
- Quickly identify bottlenecks, risks, and report key insights
- Get a quick pulse check and easily provide status updates to leaders

**Key use cases**
- Create high-level reports for executives and stakeholders
- Plan and track key milestones across different projects

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How it works
With multi-filter and sort, you can create custom views within portfolios that will allow you to manage, monitor, and report on work at scale.

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RESOURCES →
asana.com/whats-new
Goal Management
Goals

✔ Smart goals
Easily draft smart goals optimized for your organization

✔ Weighted goals
Measure goal progress more precisely

✔ Goal progress charts
Easily visualize achievements over time
Draft smart goals optimized for your organization

Overview
Write more effective goals and standardize them across your organization. With the help of AI, get suggested tips to draft goals based on best practices.

Key benefits
- Draft impactful goals using measurable best practices
- Drive goals standardization across your entire organization

Key use cases
- Goal management
- Organizational strategic planning

How it works
When drafting a new goal, you can provide high-level information and then get recommendations from AI on how to improve the goal. Before saving, you can adjust the tone to reflect desired outcomes.
Measure progress more precisely with weighted goals

**Overview**
Measure and track progress in the way that works best for your organization. Customize how much every project, task, and subgoal impacts your goal's progress.

**Key benefits**
- Use custom weights to accurately track goal progress
- Leverage automatic progress roll-ups so goal progress is accurate in real-time

**Key use cases**
- Goal management and tracking

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**How it works**
Define weights for items (subgoals, projects, and tasks) connected to automatic progress rollups (APR) for goals.
Visualize achievements over time with goal progress charts

Overview
A goal’s progress over time can be visualized using a chart on the goal’s detail page.

Key benefits
- Leverage historical data to track goal progress and identify trends
- Eliminate busywork around collecting data and speed up decision-making

Key use cases
- Goal management and tracking

How it works
On the goal detail page, you can visualize goal progress over time with a chart of all previous updates and their statuses. You can also drill into specific updates for detailed insights.
Resource Management
Resource Management

Capacity planning
Staff projects efficiently and effectively

[Image of a capacity planning dashboard showing tasks and team members]
Staff projects efficiently and effectively with capacity planning

**Overview**
Create capacity plans grouped by project, allowing you to see everyone working on a specific set of projects, including when they’re staffed and how much they are allocated.

**Key benefits**
- Make high-level resourcing decisions that drive clear alignment to strategic plans
- Ensure the most critical projects have the right people working on them
- Quickly identify staffing gaps before they cause delays

**Key use cases**
- Resource management

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**How it works**
You can add projects or entire portfolios from the projects tab.

RESOURCES ➔
Reporting

☑️ Stacked bar charts

Visualize data effectively for richer insights
Visualize data effectively for richer insights with stacked bar charts

Overview
Develop more advanced reports and dashboards by using stacked bar charts. This enables you to report on multiple dimensions and data points at once to identify trends more effectively and make decisions quickly.

Key benefits
- Analyze data across multiple dimensions simultaneously
- Identify patterns and trends quickly to get actionable insights

Key use cases
- Communicating insights, trends, & KPIs clearly to stakeholders and executives

How it works
This feature is a chart type available in Asana reporting.
Admin & Security
Admin & Security

- **Sandboxes**
  Test new features to ensure they integrate seamlessly with existing workflows

- **Pause a member’s license**
  Manage your billing cycle more effectively by pausing the licenses of temporarily inactive users
Test new features in a sandbox to ensure they integrate seamlessly with existing workflows

**Overview**
Sandboxes are safe testing environments where super admins can try out new features and processes without risking your data. They provide a separate space to experiment with features and integrations before scaling them in your production environment.

**Key benefits**
- Confidently roll out new features in a way that enhances rather than disrupts workflows
- Create thoughtful rollout plans to support user adoption
- Minimize end-user disruption

**Key use cases**
- Testing new features
- Training and onboarding new users
- Evaluating integrations and admin controls

**How it works**
Super admins can request sandboxes by contacting Customer Support. Once your domain's sandbox is enabled, super admins can navigate to their profile icon and click Sandbox. From there, they can invite other users.
Manage your billing cycle more effectively by pausing the licenses of temporarily inactive users

**Overview**
Admins, super admins, and billing owners can pause the license of any member in their organization, effectively reducing the number of paid seats by one.

**Key benefits**
- Manage your billing cycle more efficiently by pausing licenses without the need to permanently remove organization members from your Asana workspace.

**Key use cases**
- Pausing a member’s license without deprovisioning their account.

**How it works**
In the admin console, navigate to the member’s tab, select the three-dot icon next to the member’s information and select remove.
Integrations & API
Integrations & API

- **Asana + Microsoft**
  Coordinate work across best-in-class tools with Asana + Microsoft

- **Google Chrome**
  Streamline work intake across Google Chrome

- **Asana for Gmail**
  Bring planning and execution together with Asana for Gmail
Coordinate work across best-in-class tools with Asana + Microsoft

Overview
Allow teams to collaborate effectively by accessing key Asana information in Microsoft:
- Schedule meetings based on availability, directly from Asana
- Automatically send emails based on triggers in Asana
- Convert emails into actionable and trackable work in Asana without switching between tools. Add the email to an existing Asana task as a comment directly from Outlook.

Key benefits
- Streamline meeting scheduling
- Minimize context switching
- Automate email notifications at scale

Key use cases
- Automate workflows for recurring scheduling needs
- Create automated notifications for users who are not in Asana
- Track work intake, approvals, and feedback

How it works
Head to the Microsoft marketplace and select “get it now.” Follow the instructions to add the Asana add-in to your Outlook inbox.
Streamline work intake across Google Chrome

Overview
The new Chrome extension enables teams to simplify cross-functional collaboration and provide visibility to relevant stakeholders, without having to switch between tools. Create and edit tasks directly from Gmail, a web page, etc. all without leaving Chrome.

Key benefits
- Capture task details and relevant information without interrupting workflows
- Minimize distractions and context switching
- Ensure everyone is working with the latest source of truth

Key use cases
- Cross-functional communication

How it works
Search for “Asana” in the Chrome Web Store. Click “add to chrome” to install the integration and follow the prompts to accept the requested permissions and log in.
Bring planning and execution together with Asana for Gmail

Overview
Turn emails into tasks, assign responsibility, set due dates, and sync to projects.

Key benefits
- Ensure email context is seamlessly shared with all collaborators contributing to the same task or project

Key use cases
- Work intake or triage
- Tracking approvals and/or feedback

How it works
Download the extension from the Gmail add-on marketplace. If you are the admin for your domain, you can install the add-on for the entire organization.
Asana AI
Asana AI

- Smart projects
  Create structured projects effortlessly

- Smart rules
  Build and optimize your operations faster

- Smart summaries on portfolios
  Get up to speed on notable changes in a portfolio

- Smart goals
  Easily draft smart goals optimized for your organization

Learn more at asana.com/whats-new
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Thank you