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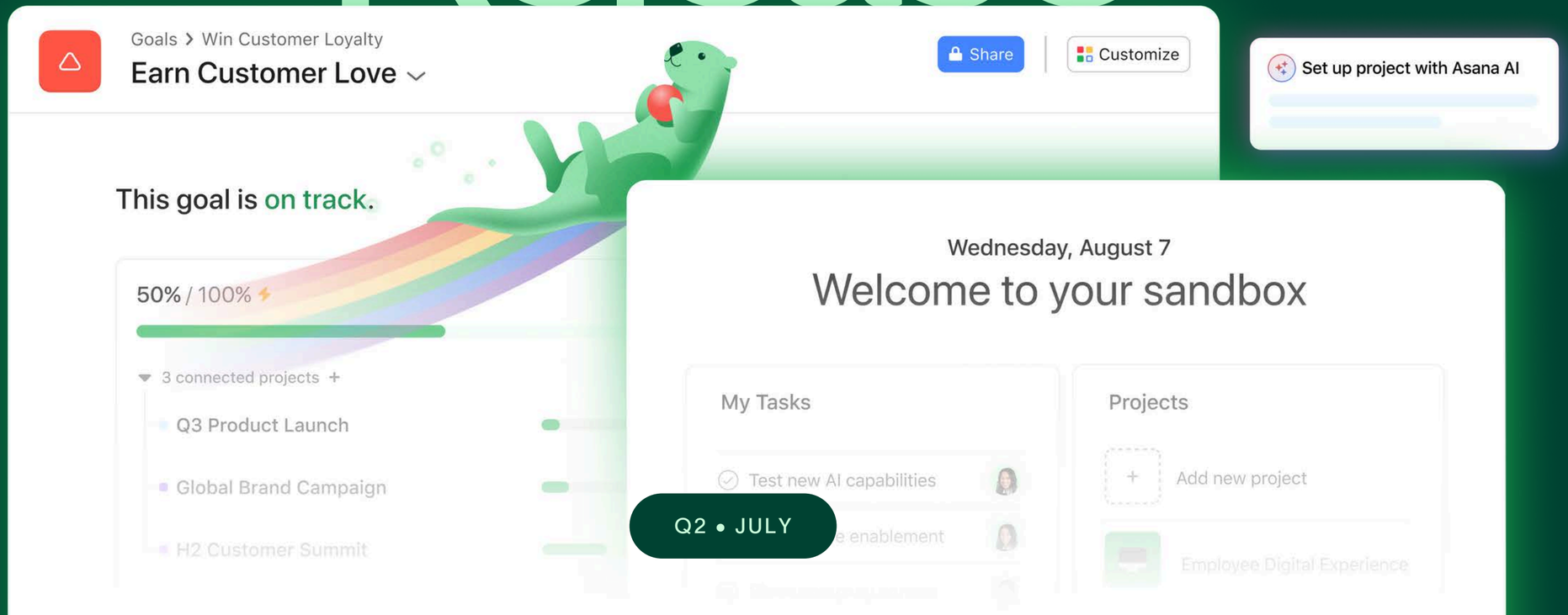
Summer 2024 Release



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SUMMER RELEASE 2024

Project & Task Management

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Project & Task Management

LEARN MORE →

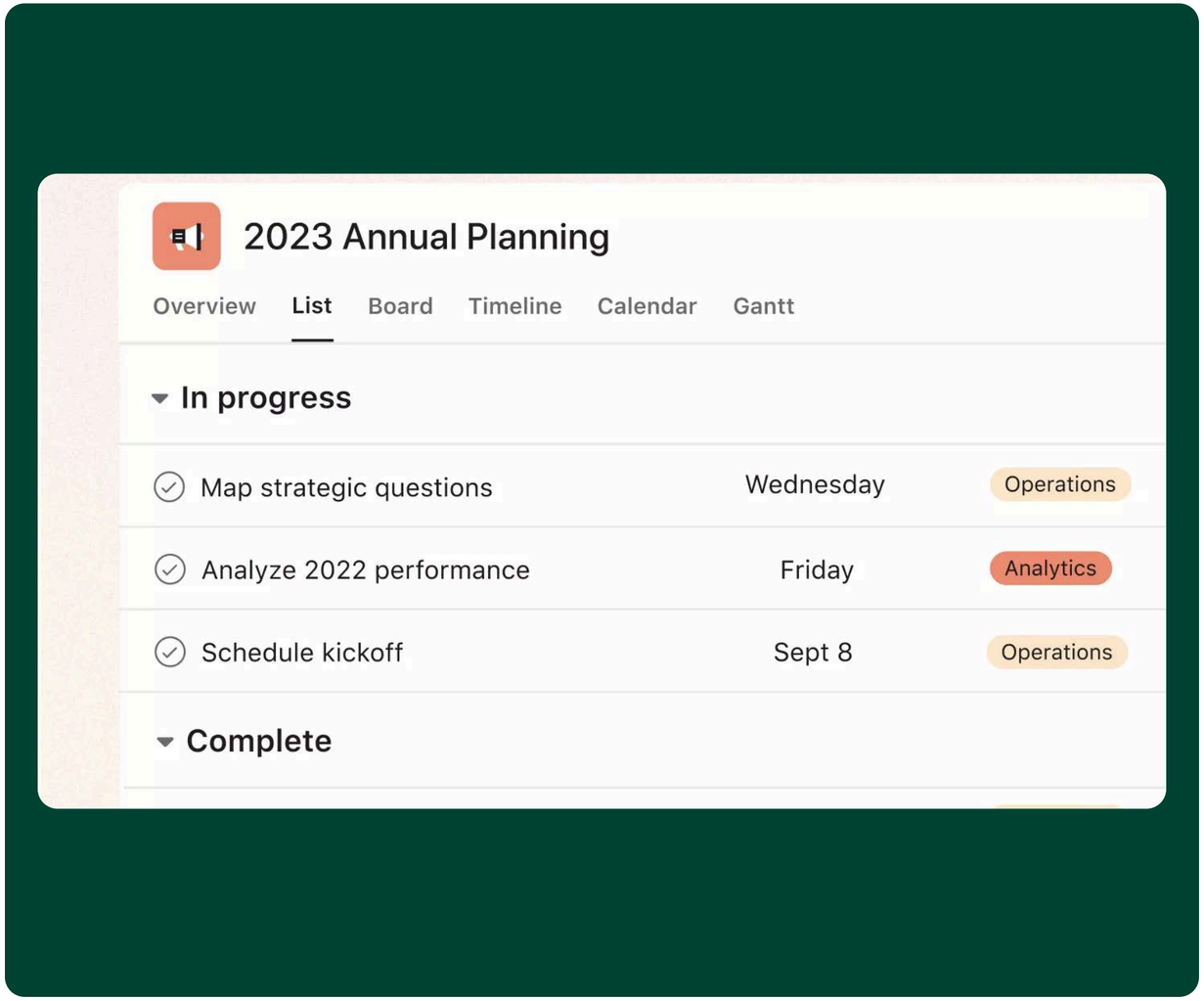
Smart projects
Kick-off projects effortlessly

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



Kick-off projects effortlessly with smart projects

RESOURCES →

Overview

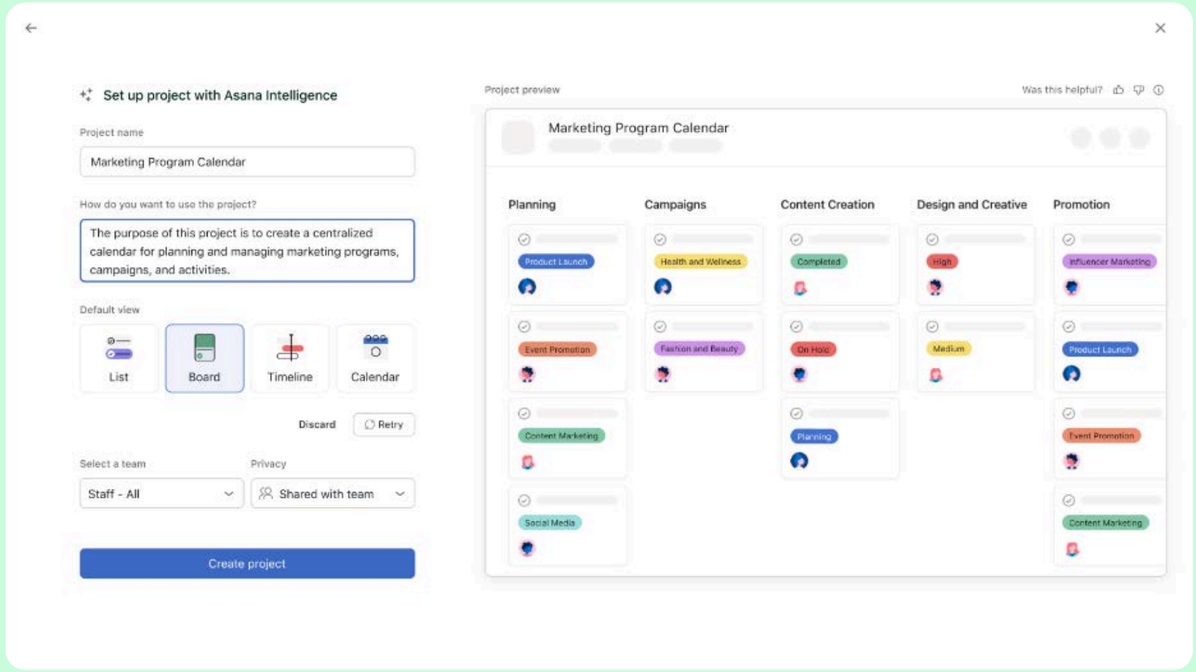
Remove the writer's block from project creation by letting AI create projects for you.

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

RESOURCES →

Overview

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

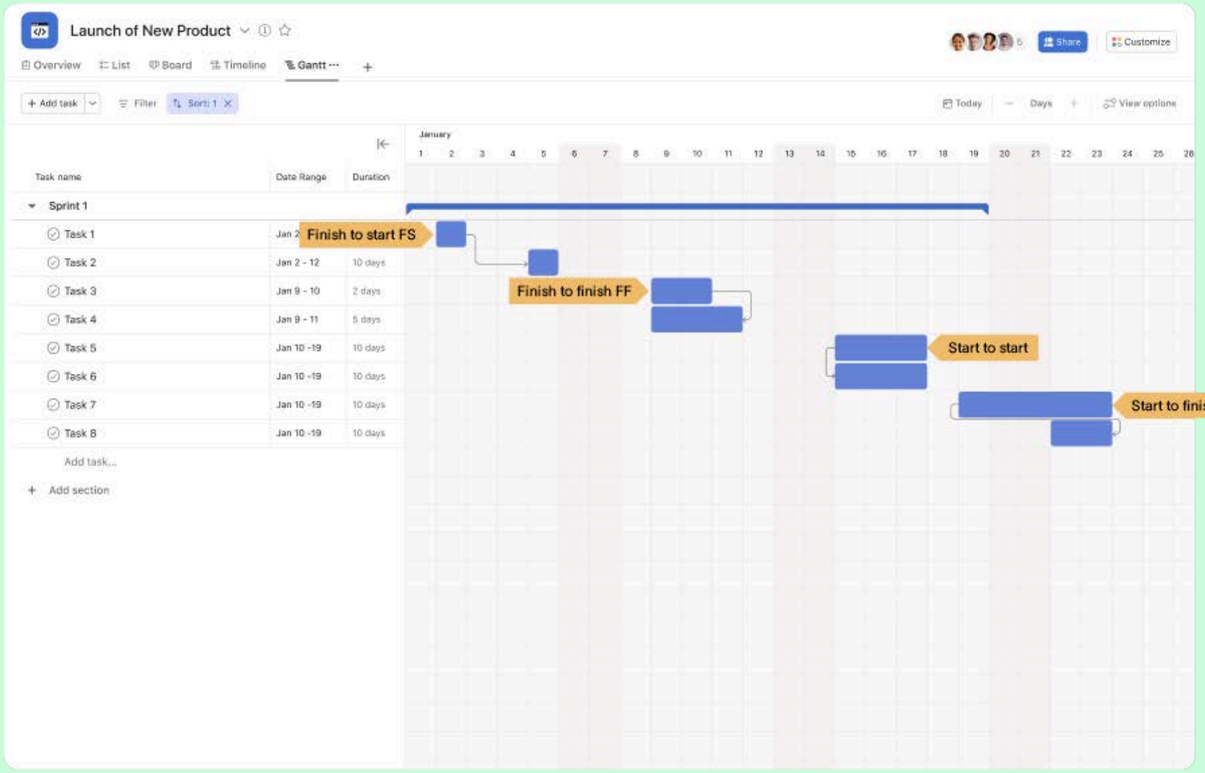
We've added three more dependency types: finish-to-finish, start-to-start, and start-to-finish.

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

RESOURCES →

Overview

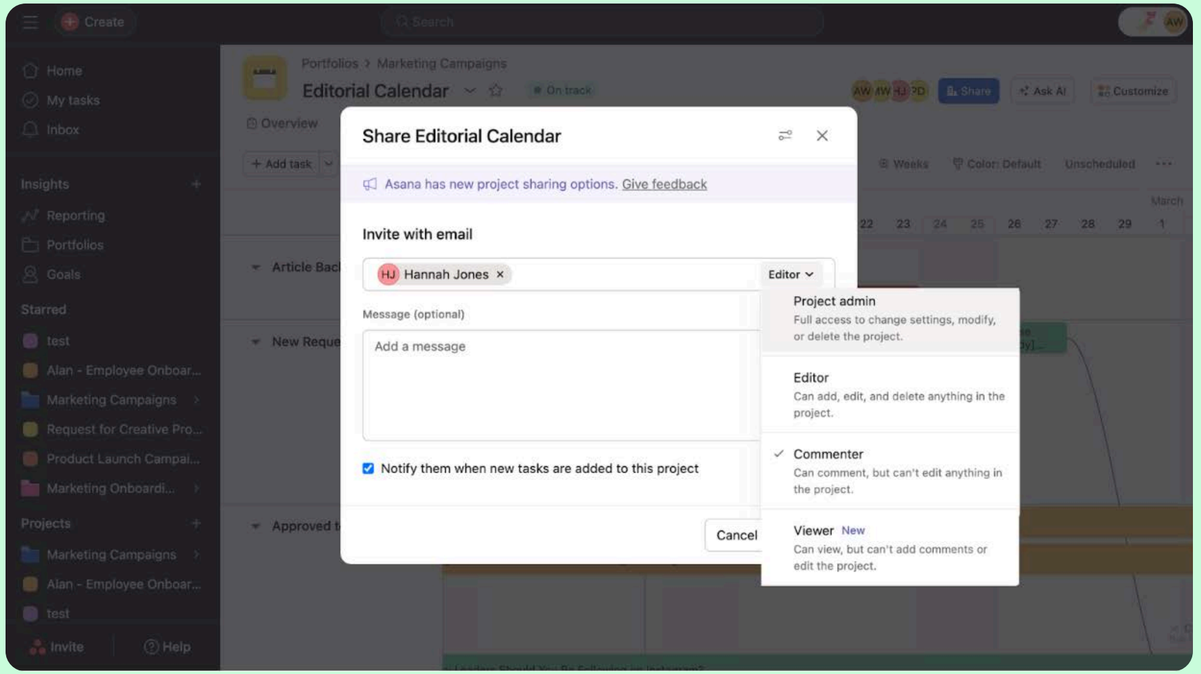
Allow “viewer” level permissions for project members who need to view project details without the ability to make edits to the project.

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

RESOURCES →

Overview

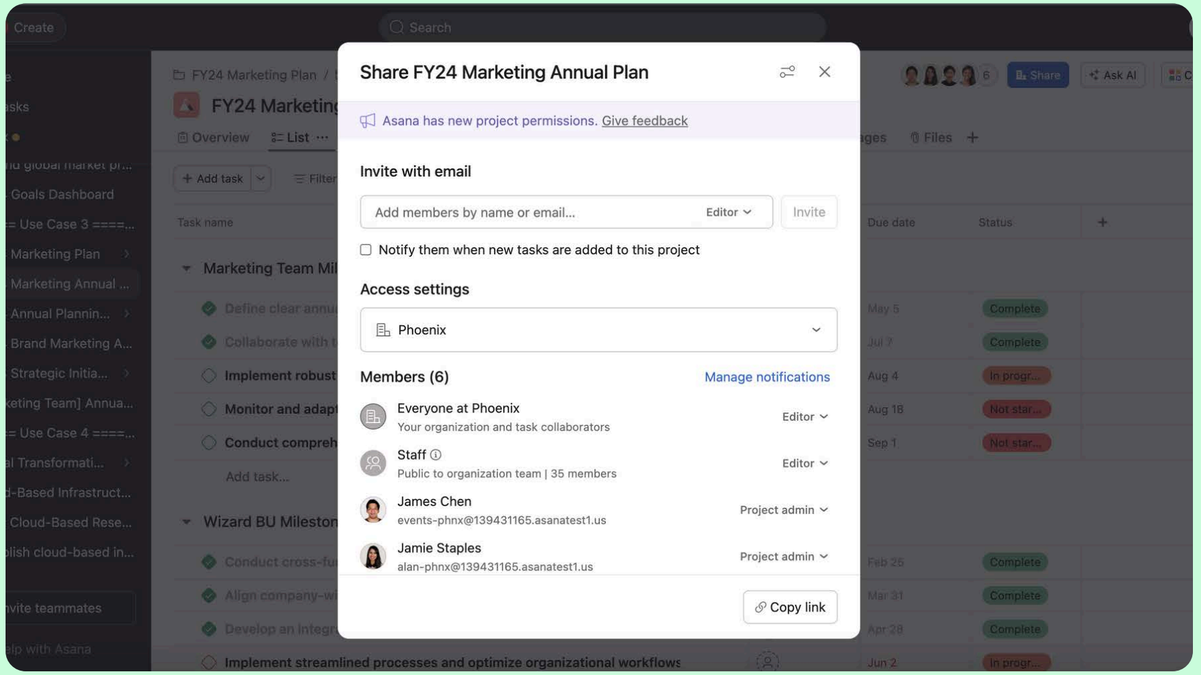
Share projects with groups of users at appropriate permission levels. Once shared, these teams can get project notifications.

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

RESOURCES →

Overview

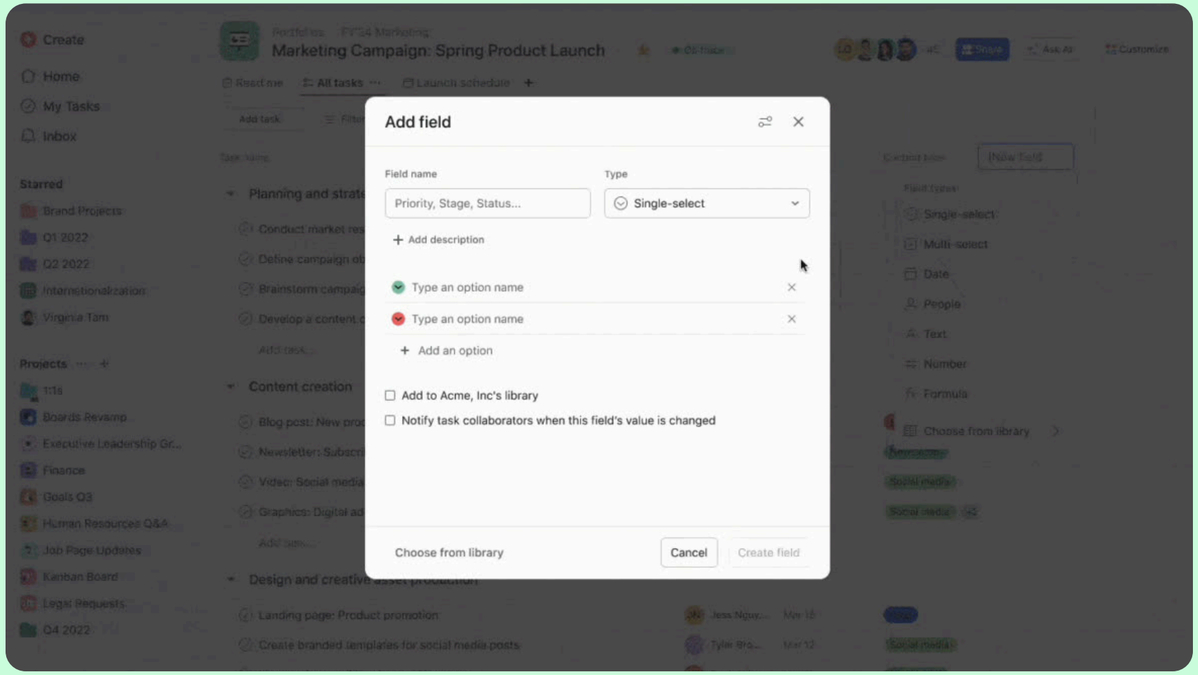
Custom fields power your workflows and reports. Now you have greater control over who can set up and edit the details of custom fields.

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.

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Workflows & Automations

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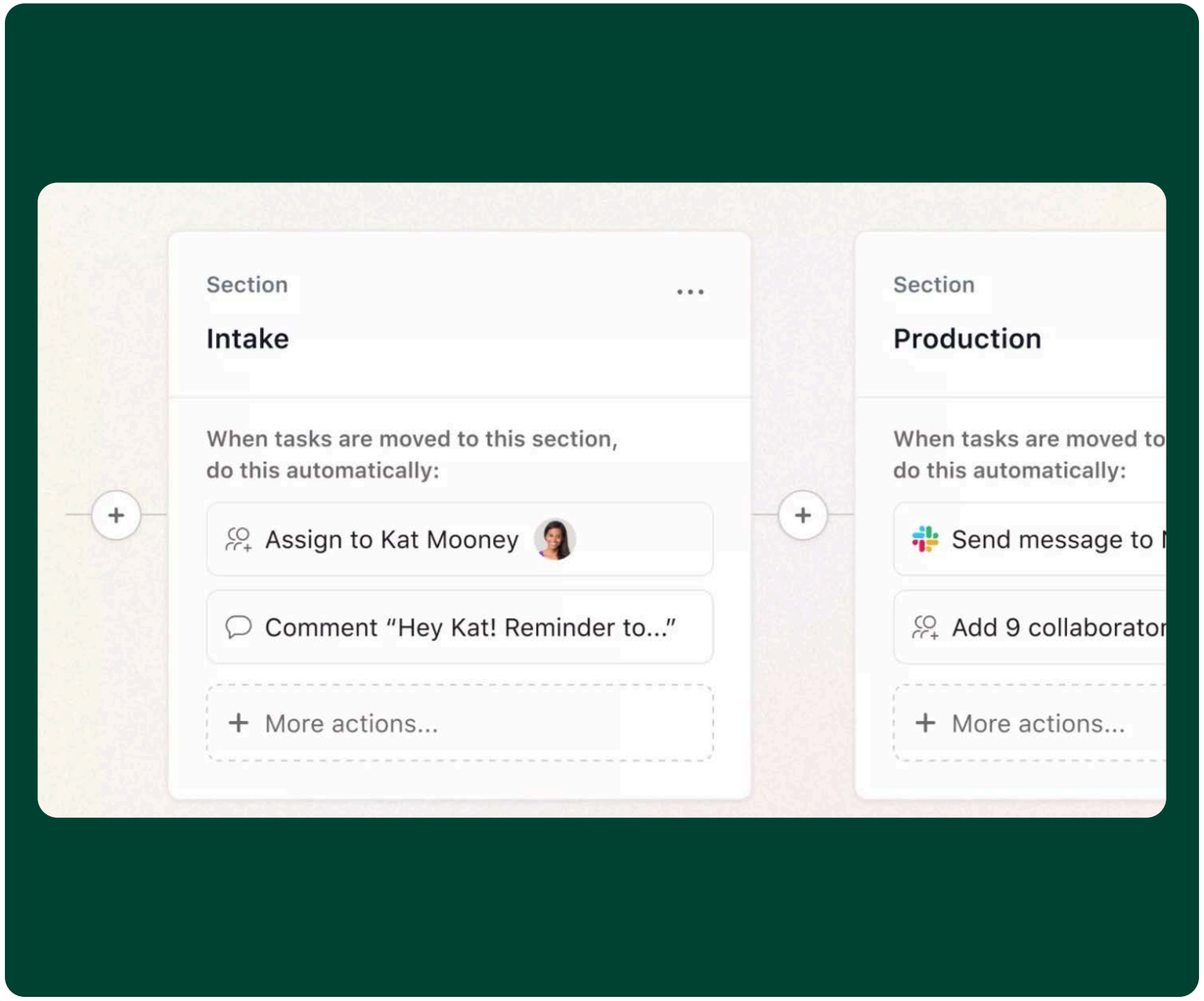
Workflows & Automations

LEARN MORE →

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

RESOURCES →

Overview

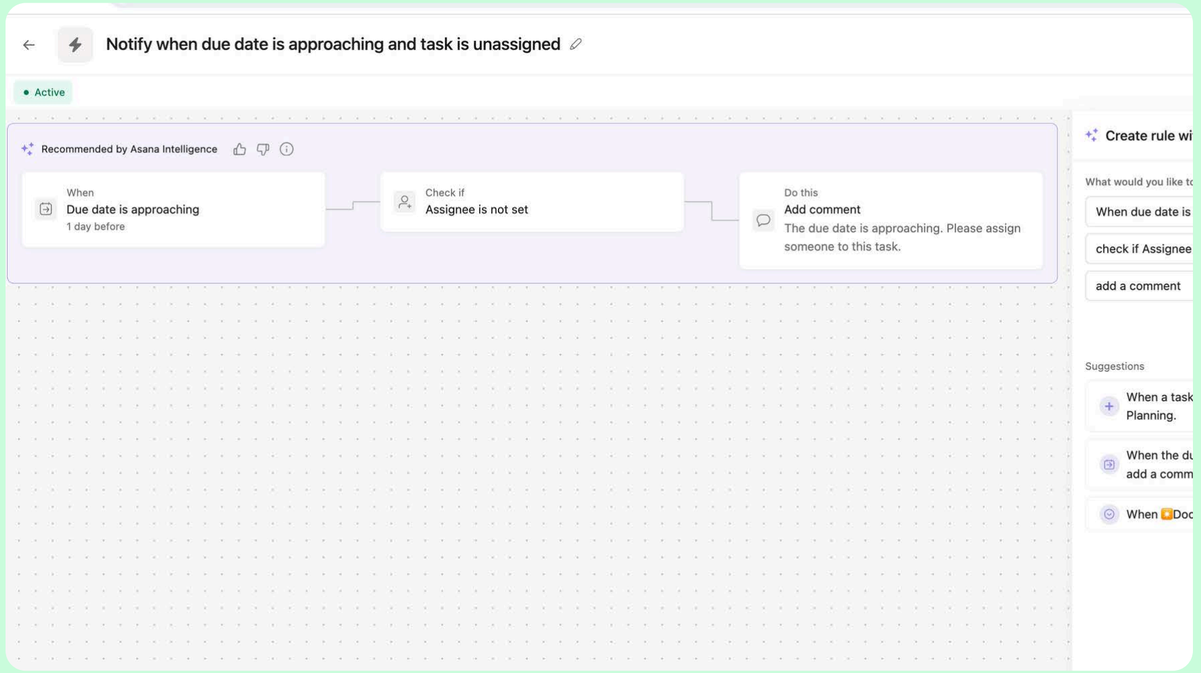
Give AI a few simple instructions and it will create rules for you. No more wrestling with triggers, conditions, and actions – simply write what you would like to automate, and let AI handle the rest.

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.

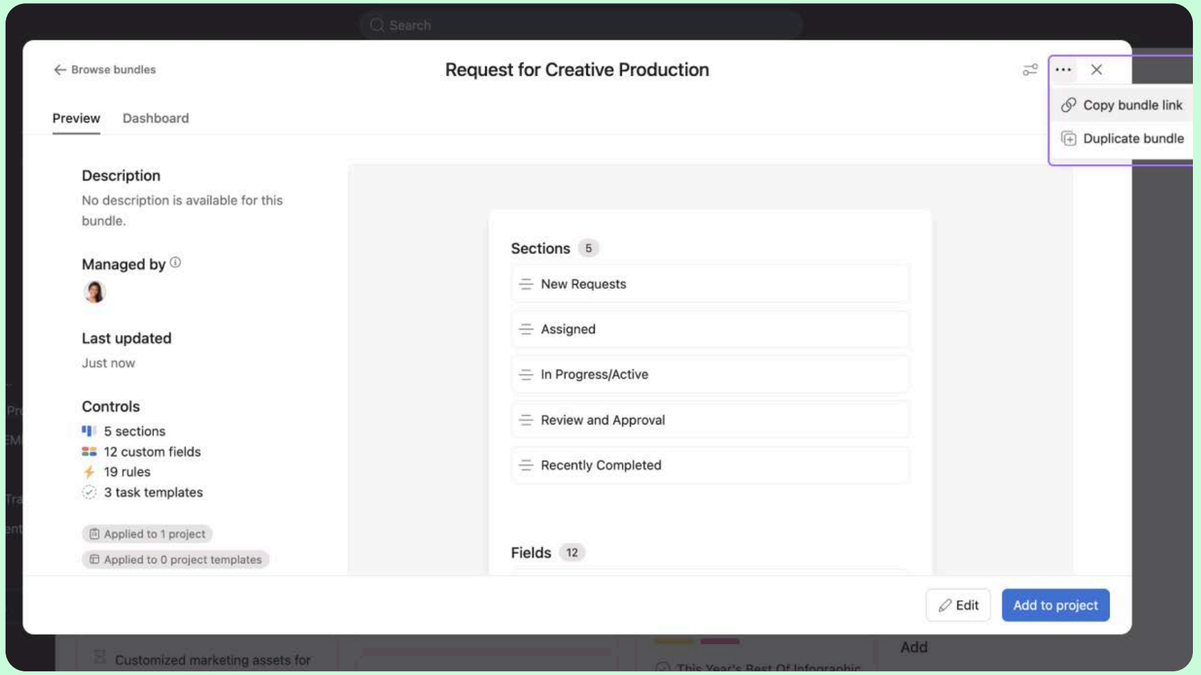
Duplicate bundles to save time and standardize workflows

RESOURCES →

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.

Multi-select bundles to scale process updates faster

RESOURCES →

Overview

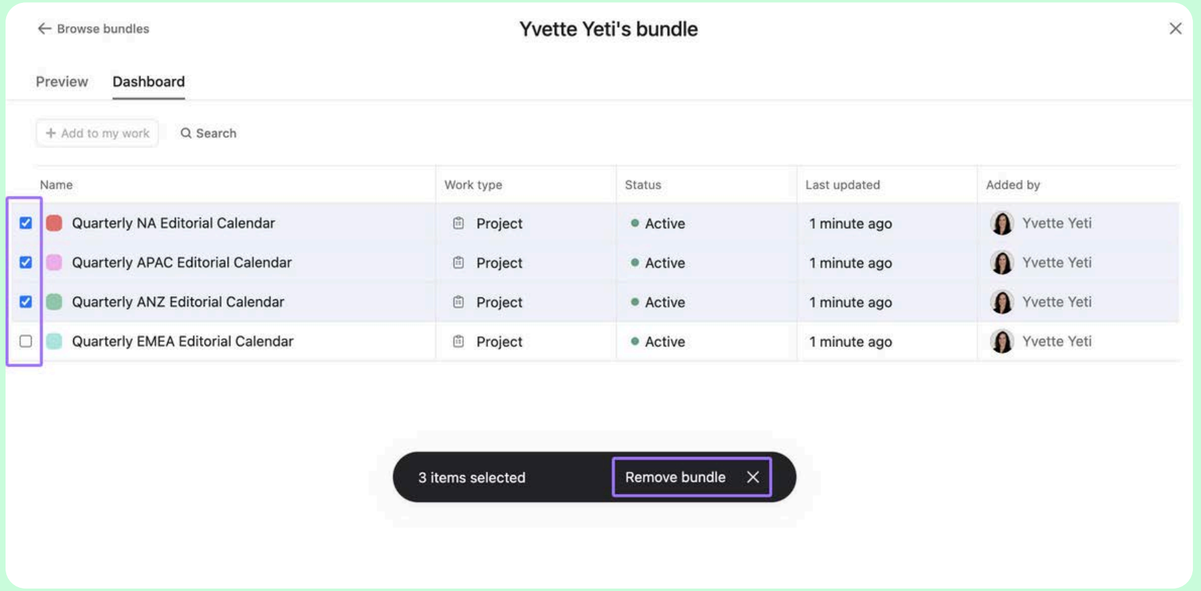
Manage ongoing processes and projects with the ability to remove a bundle from multiple projects

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.

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Portfolio Management

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Portfolios

LEARN MORE →

Portfolio summary report (PDF export)

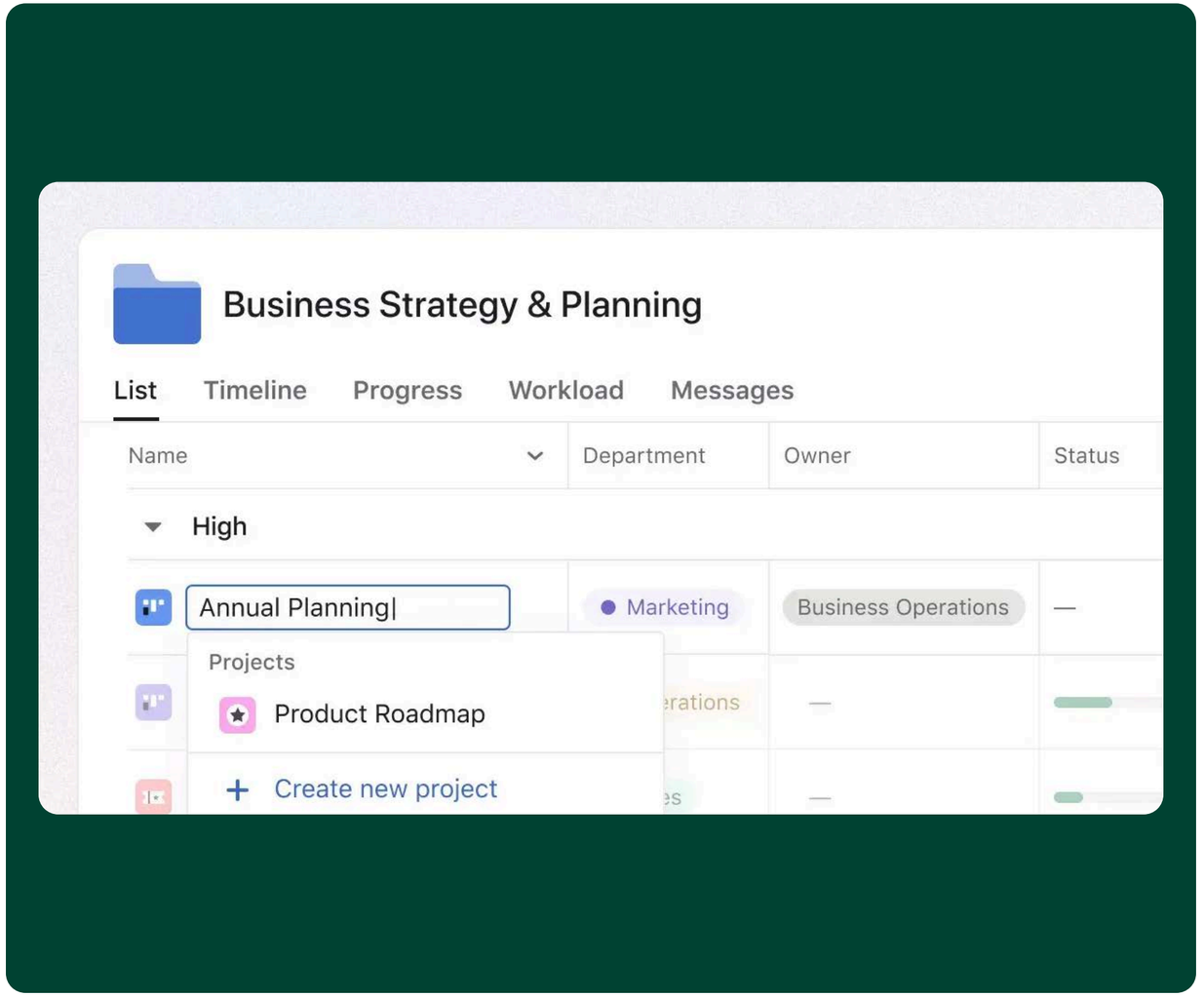
Quickly generate a summary and status of key initiatives in an executive-level PDF format

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



Generate a summary of key initiatives in an executive-level PDF format

RESOURCES →

Overview

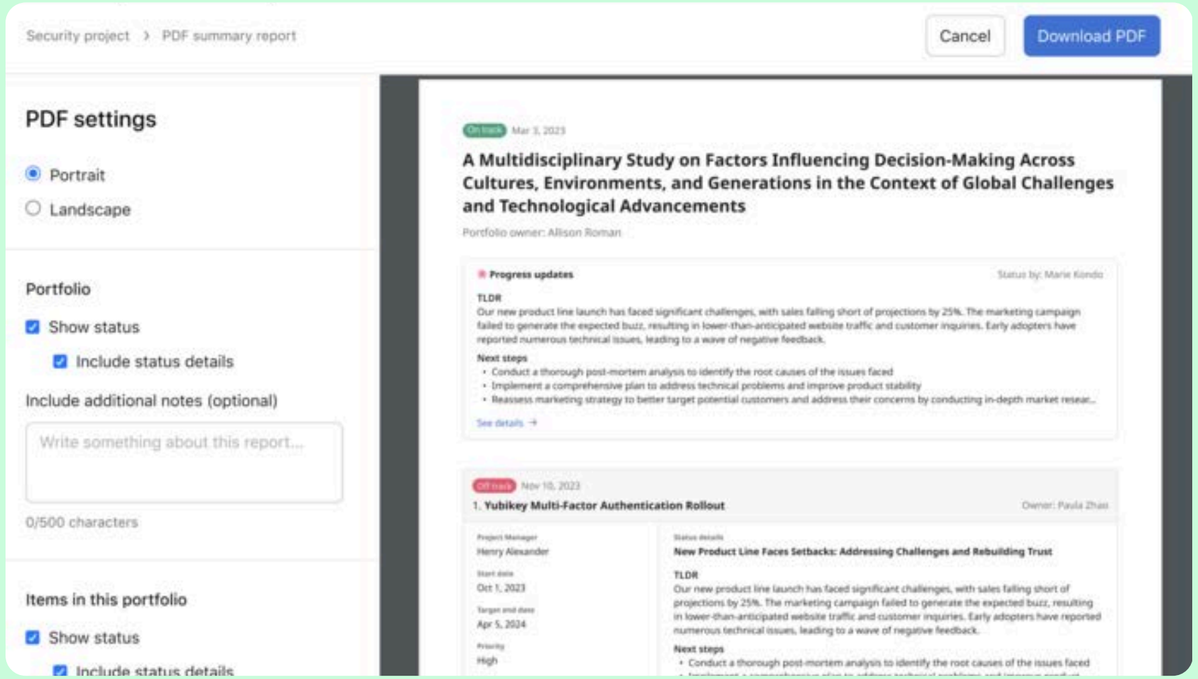
Executives can make data-driven decisions faster and drive better business outcomes by having access to key data and information promptly in a digestible PDF format. Stakeholders can share the most up-to-date information on status with executives who aren't in Asana.

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

RESOURCES →

Overview

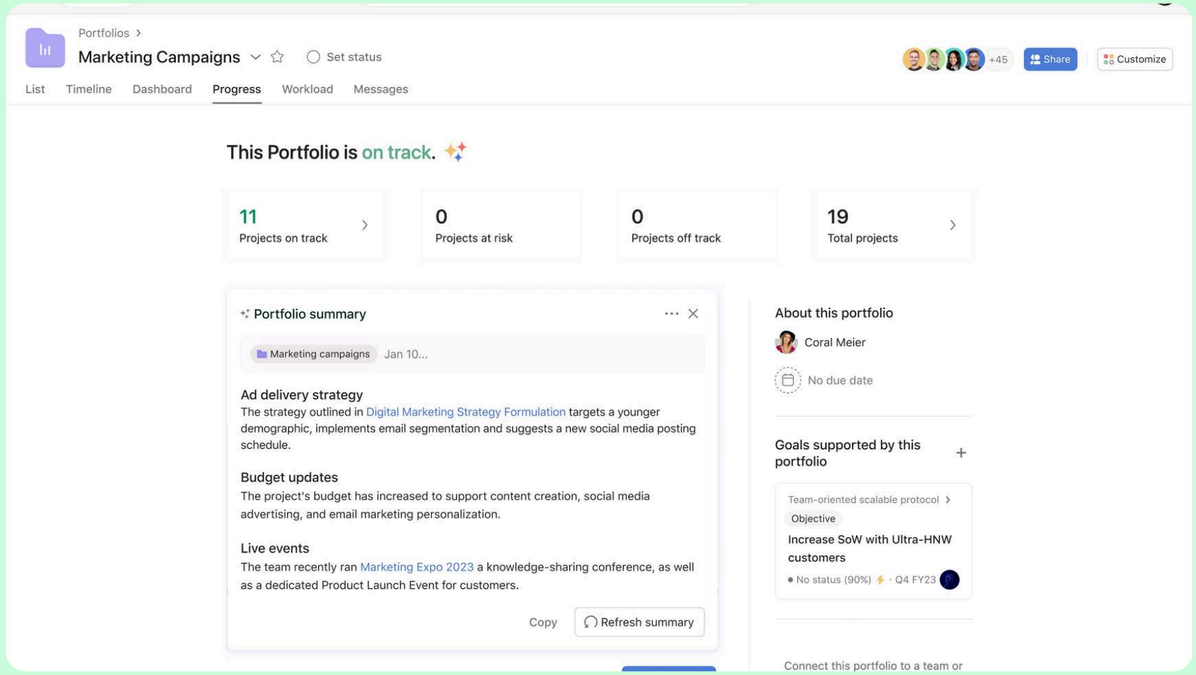
Get a summary of what's happened in a portfolio so you can stay up-to-date on the latest.

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

RESOURCES →

Overview

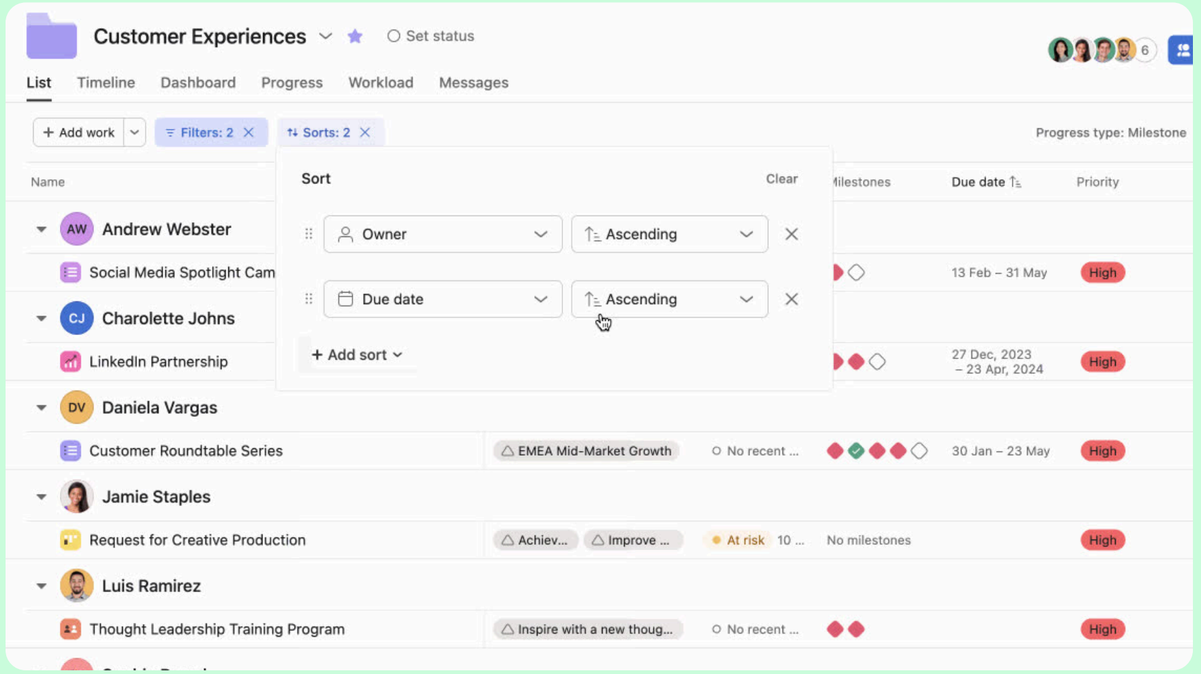
Easily review, analyze, and drill down into your portfolio data to quickly get actionable insights and make faster decisions.

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



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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Goal Management

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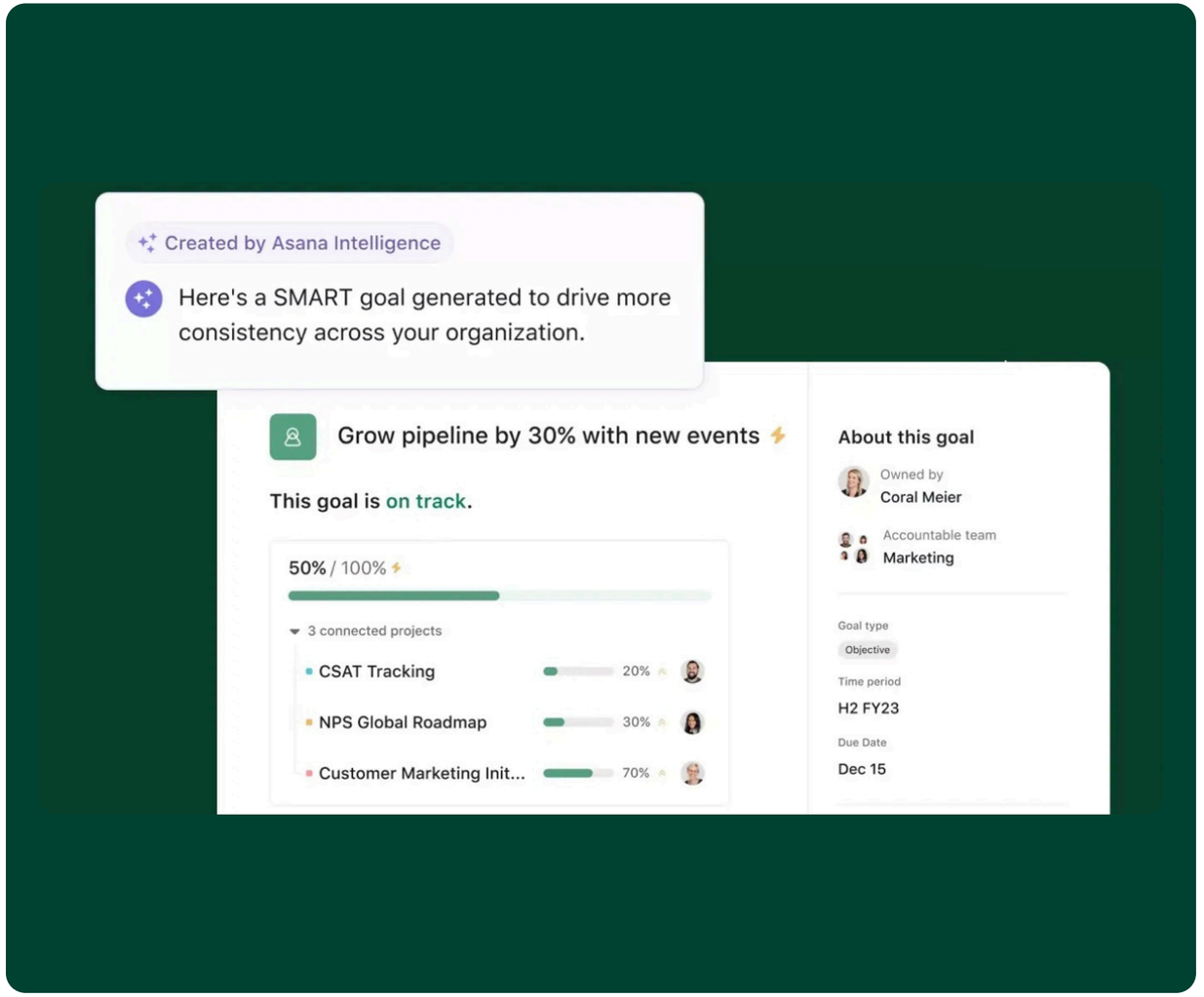
Goals

LEARN MORE →

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

RESOURCES →

Overview

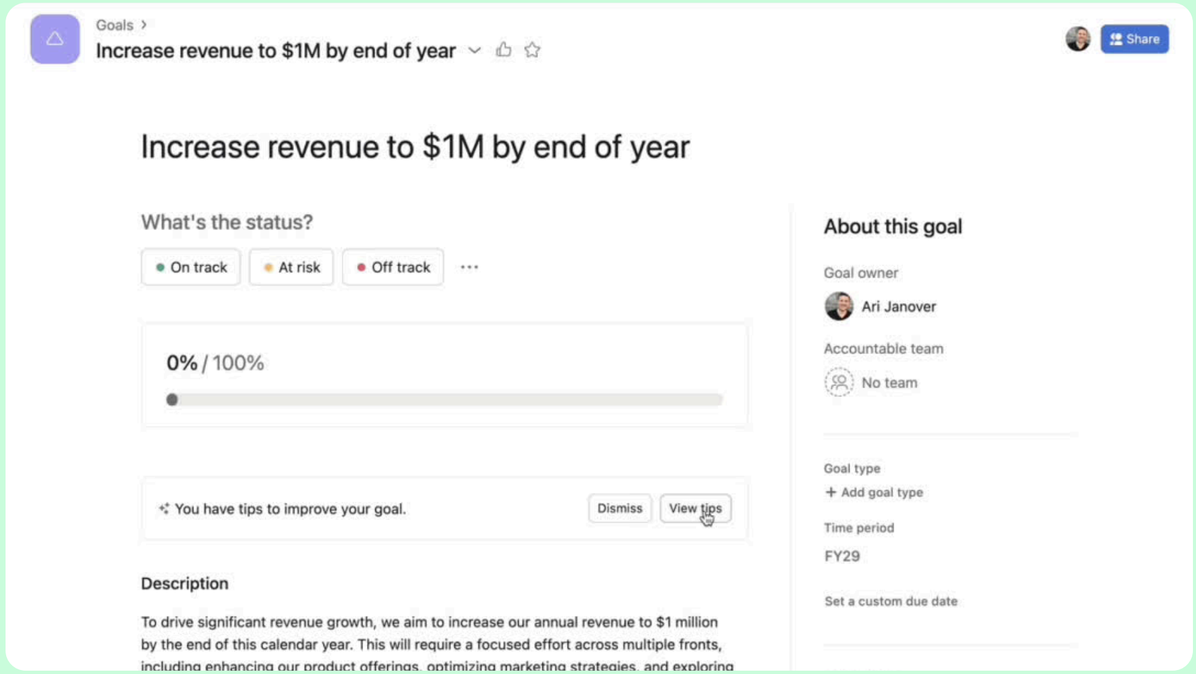
Write more effective goals and standardize them across your organization. With the help of AI, get suggested tips to draft goals based on best practices.

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

RESOURCES →

Overview

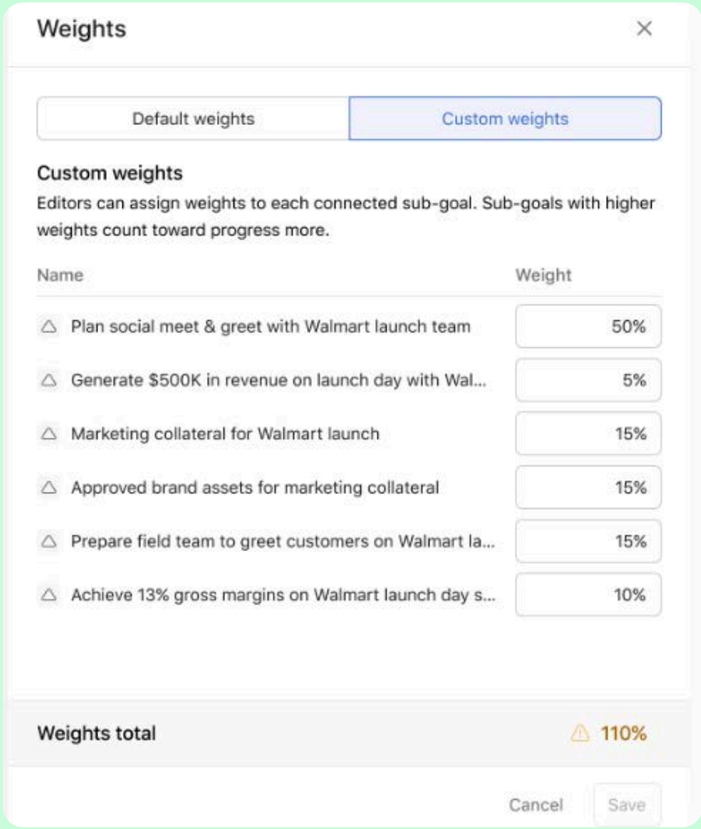
Measure and track progress in the way that works best for your organization. Customize how much every project, task, and subgoal impacts your goal's progress.

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



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

RESOURCES →

Overview

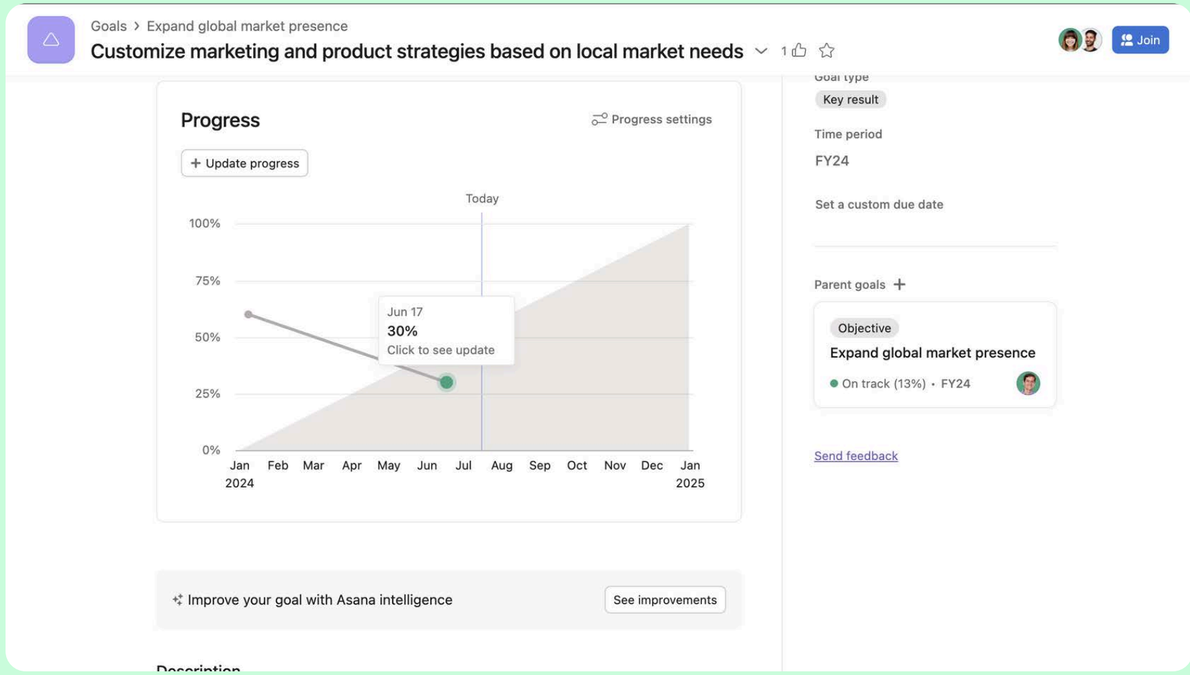
A goal's progress over time can be visualized using a chart on the goal's detail page.

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.

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Resource Management

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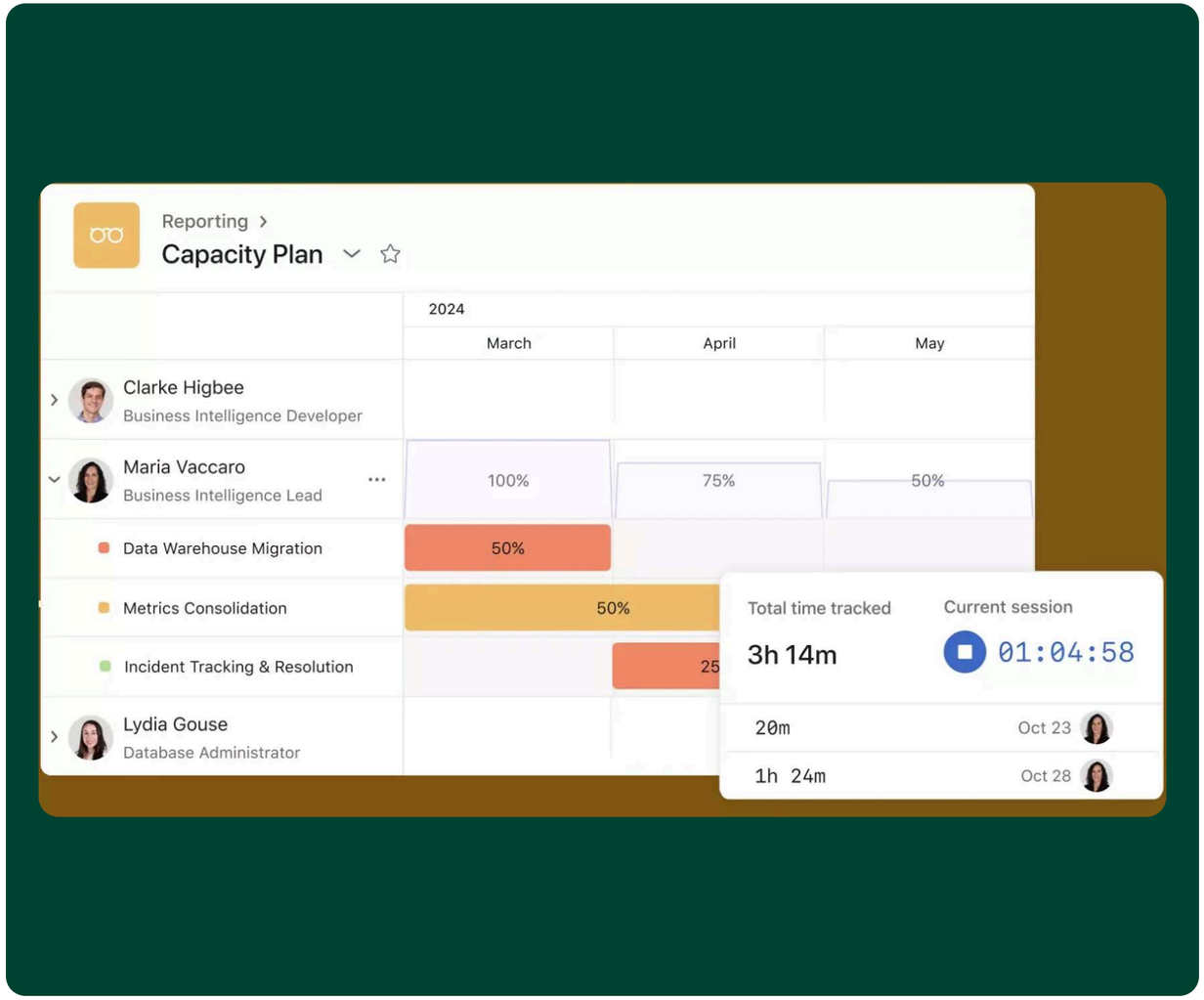
Resource Management

LEARN MORE →

Capacity planning

Staff projects efficiently and effectively



Staff projects efficiently and effectively with capacity planning

RESOURCES →

Overview

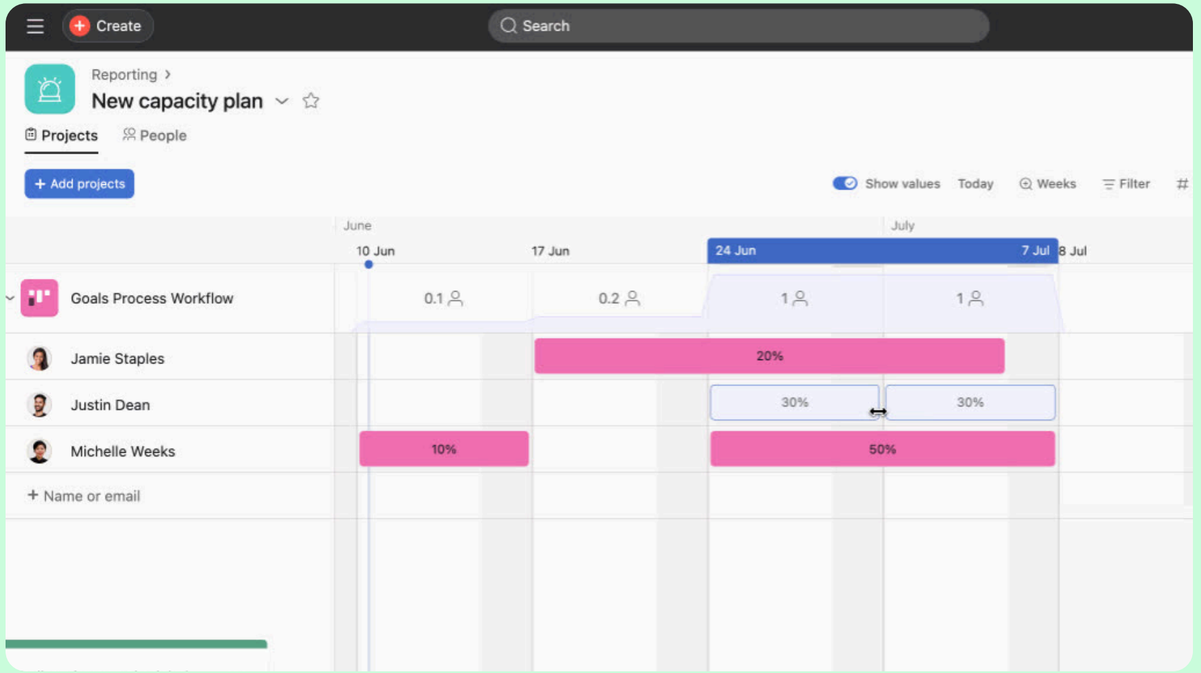
Create capacity plans grouped by project, allowing you to see everyone working on a specific set of projects, including when they're staffed and how much they are allocated.

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



How it works

You can add projects or entire portfolios from the projects tab.

Reporting

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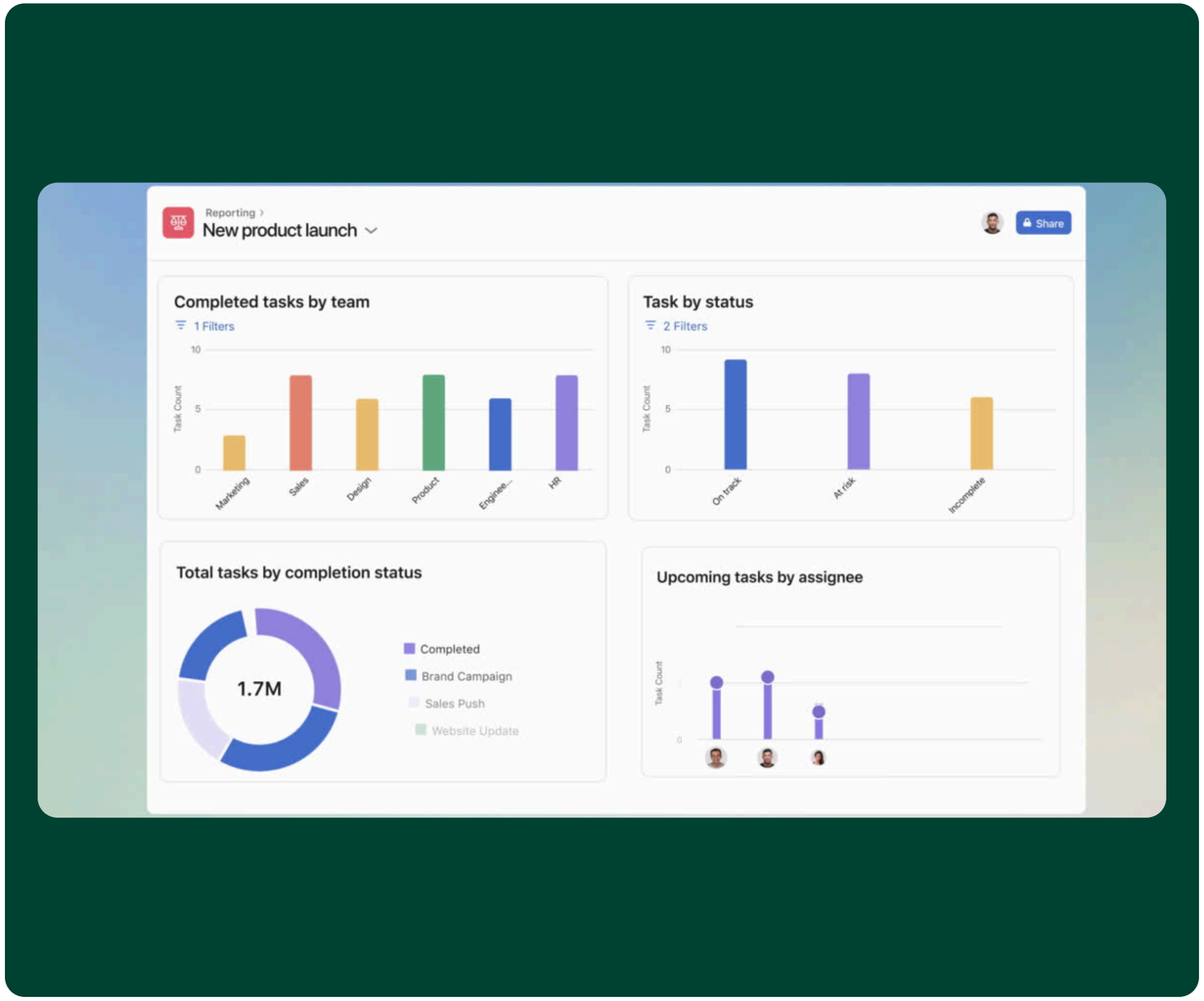
Reporting

LEARN MORE→

Stacked bar charts

Visualize data effectively for richer insights



Visualize data effectively for richer insights with stacked bar charts

RESOURCES →

Overview

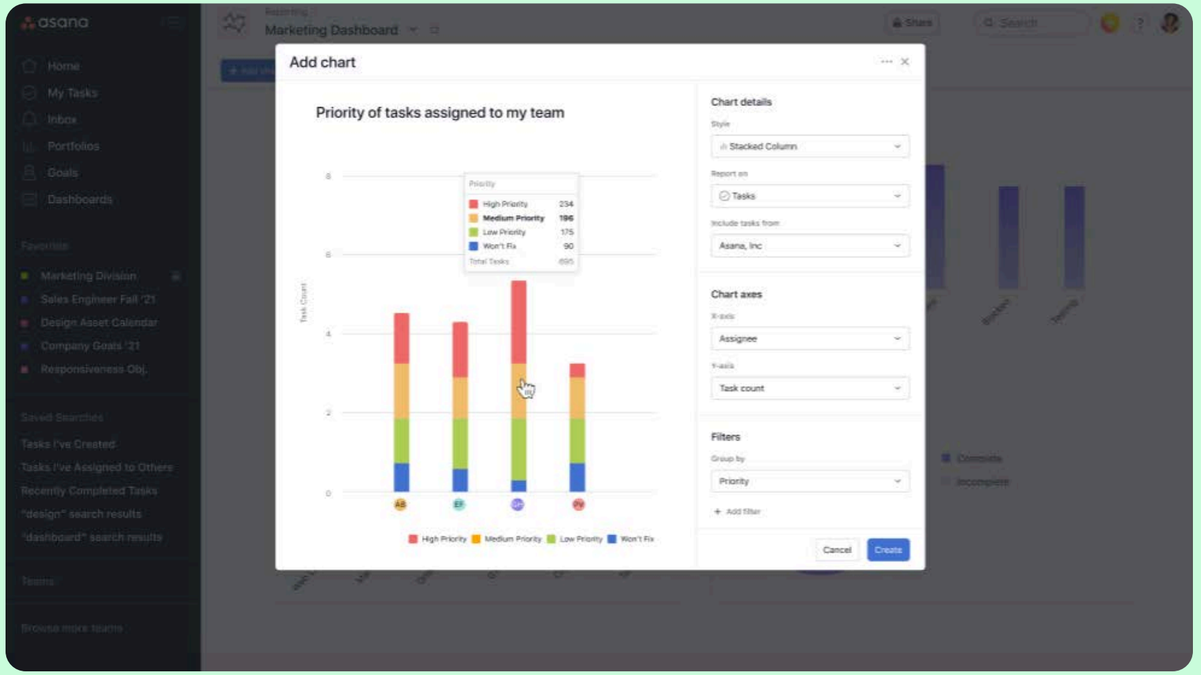
Develop more advanced reports and dashboards by using stacked bar charts. This enables you to report on multiple dimensions and data points at once to identify trends more effectively and make decisions quickly.

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.

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Admin & Security

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Admin & Security

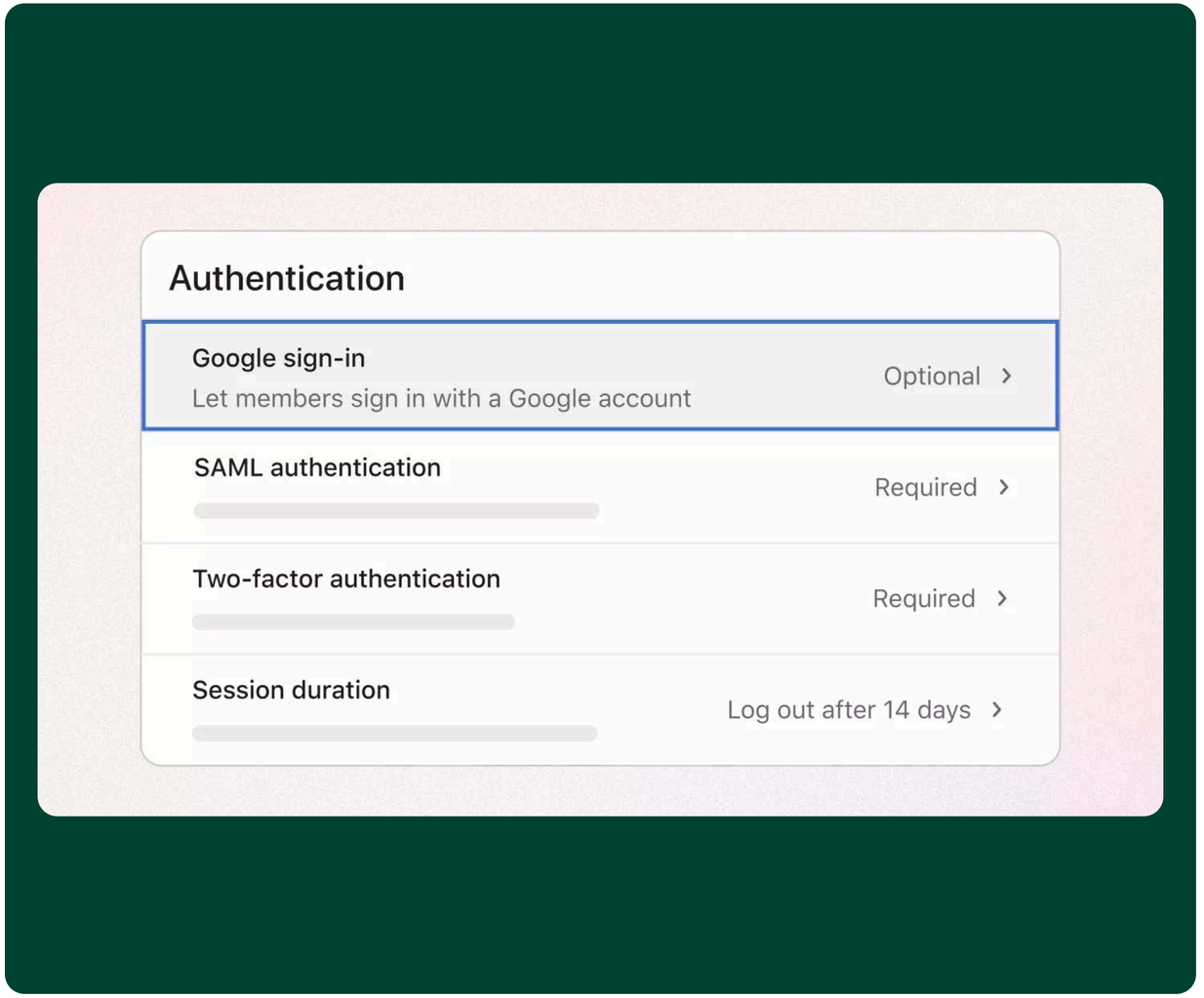
LEARN MORE →

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

RESOURCES →

Overview

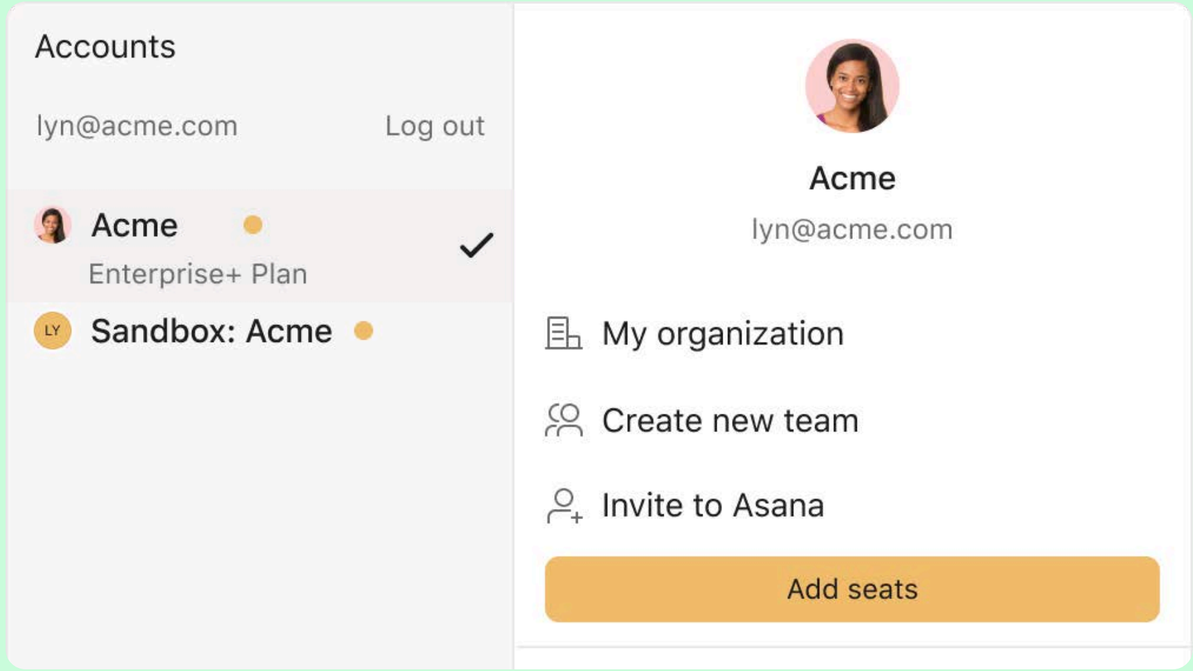
Sandboxes are safe testing environments where super admins can try out new features and processes without risking your data. They provide a separate space to experiment with features and integrations before scaling them in your production environment.

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

RESOURCES →

Overview

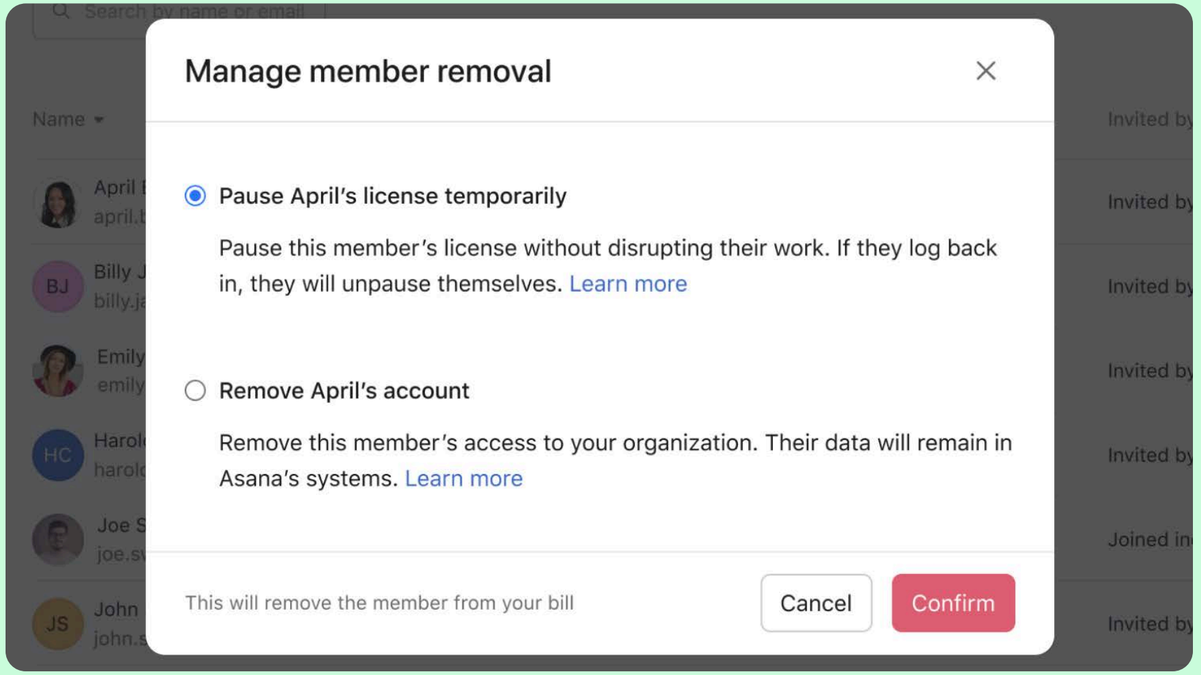
Admins, super admins, and billing owners can pause the license of any member in their organization, effectively reducing the number of paid seats by one.

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

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Integrations & API

LEARN MORE →

Asana + Microsoft

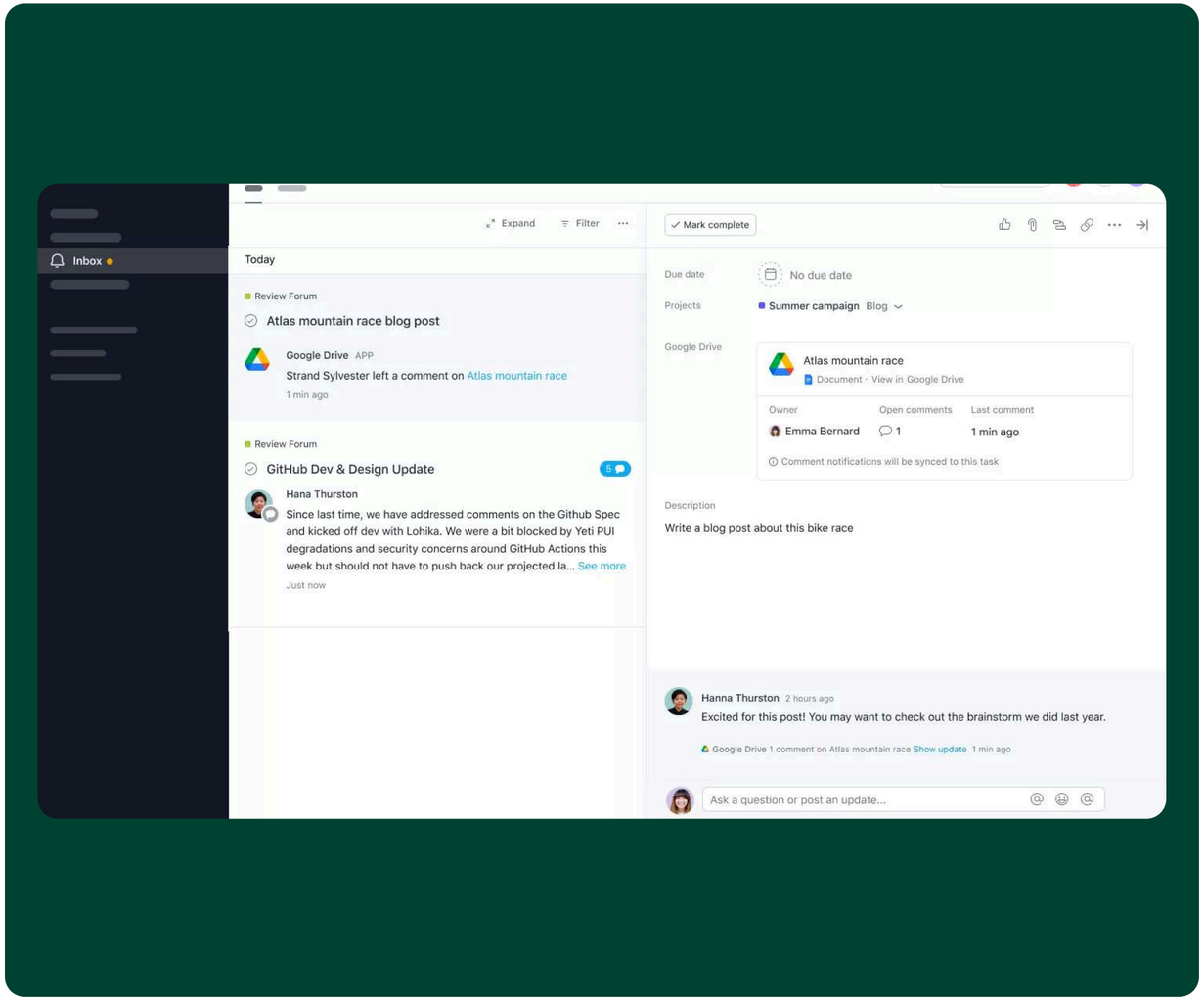
Coordinate work across best-in-class tools with Asana + Microsoft

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

RESOURCES →

Overview

Allow teams to collaborate effectively by accessing key Asana information in Microsoft:

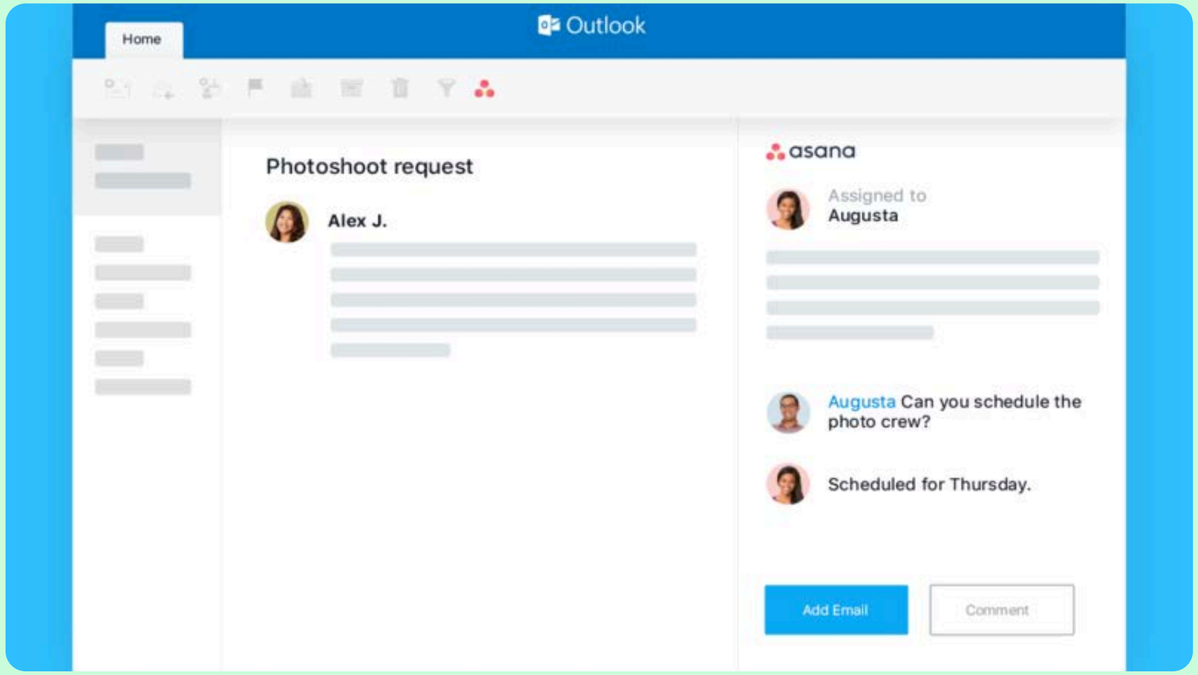
- Schedule meetings based on availability, directly from Asana
- Automatically send emails based on triggers in Asana
- Convert emails into actionable and trackable work in Asana without switching between tools. Add the email to an existing Asana task as a comment directly from Outlook.

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

RESOURCES →

Overview

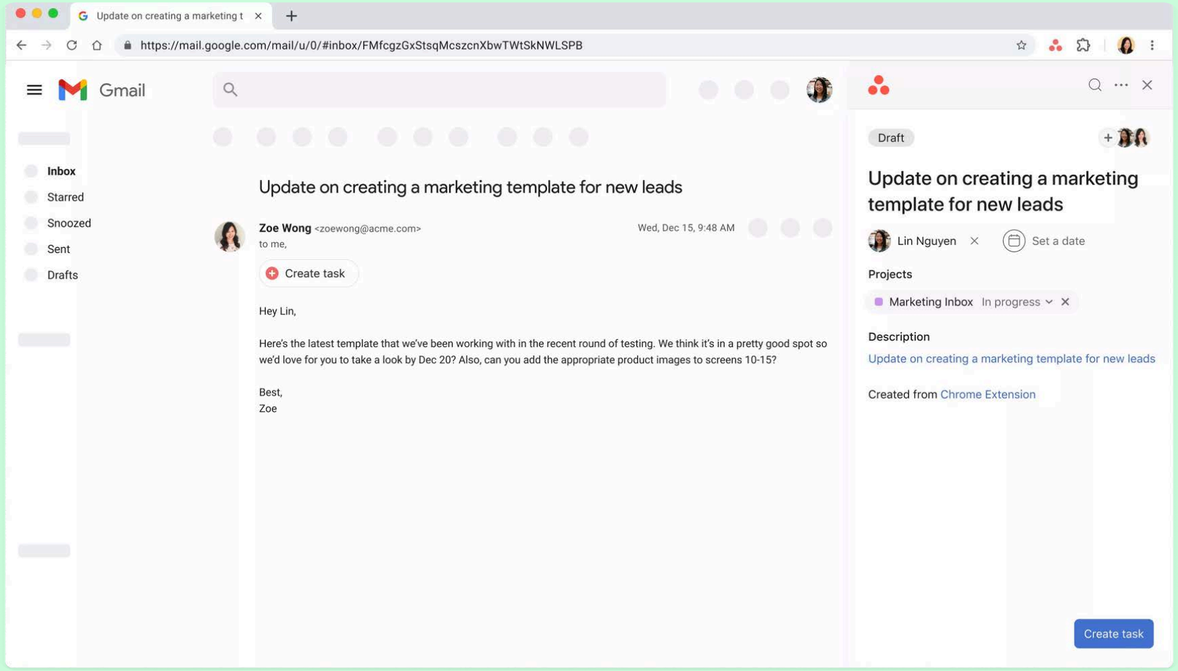
The new Chrome extension enables teams to simplify cross-functional collaboration and provide visibility to relevant stakeholders, without having to switch between tools. Create and edit tasks directly from Gmail, a web page, etc. all without leaving Chrome.

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

RESOURCES →

Overview

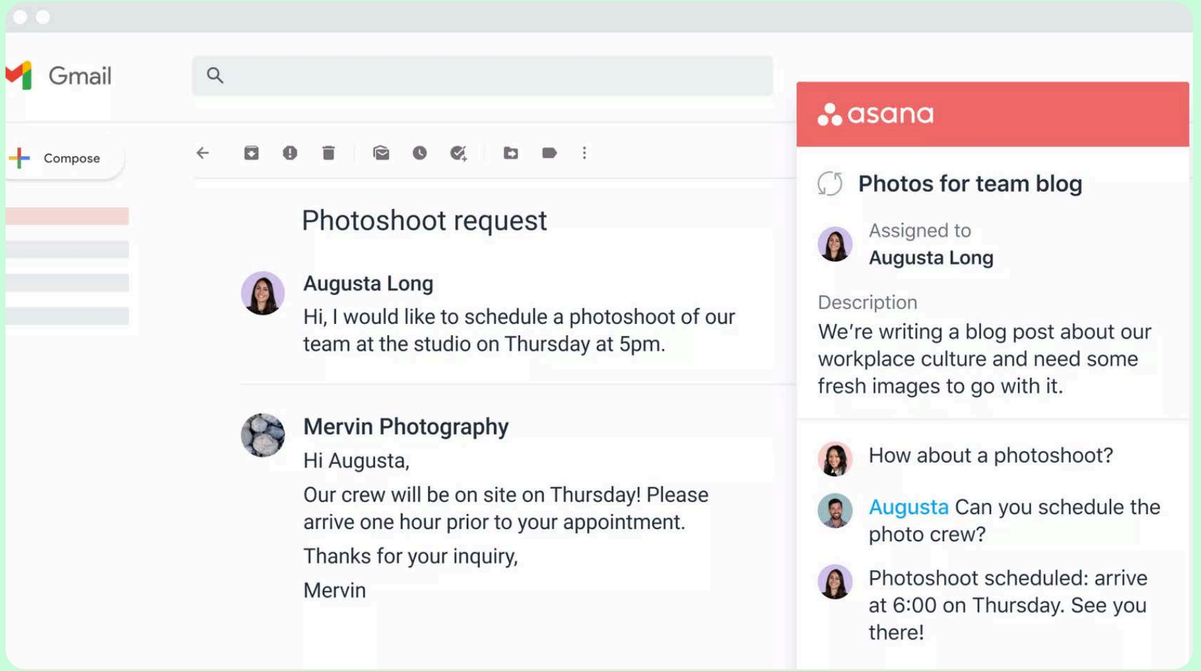
Turn emails into tasks, assign responsibility, set due dates, and sync to projects.

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.

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Asana AI

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Asana AI

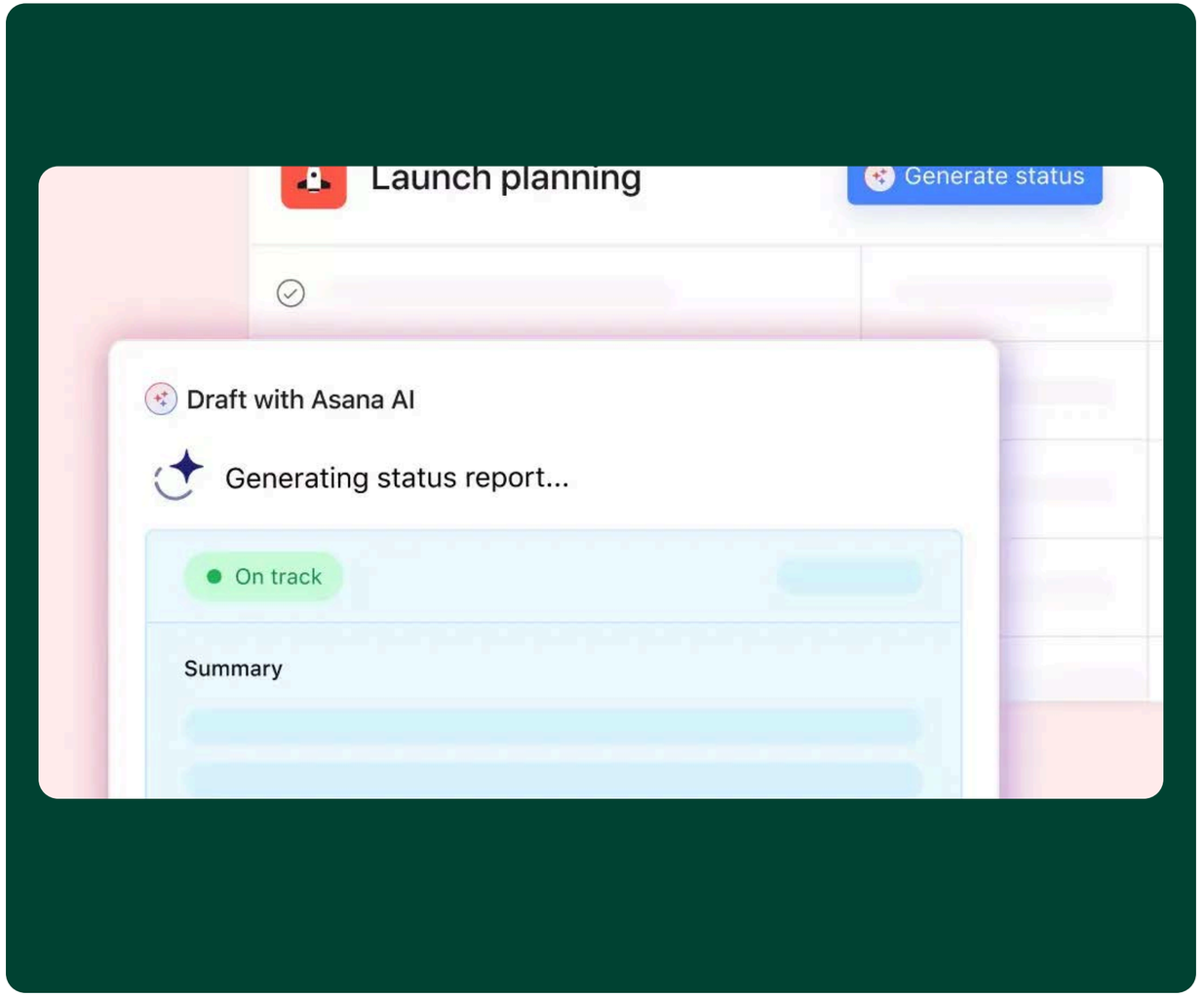
LEARN MORE →

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



Create structured projects effortlessly with smart projects

RESOURCES →

Overview

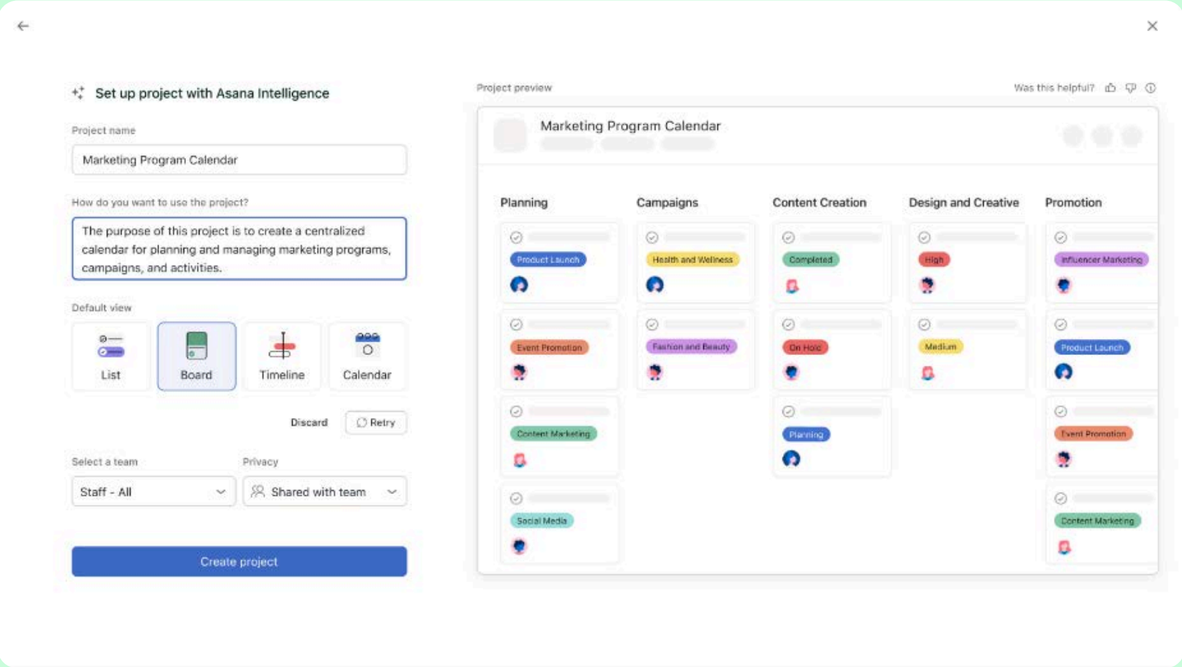
Remove the writer's block from project creation by letting AI create projects for you.

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.

Build and optimize your operations faster with smart rules

RESOURCES →

Overview

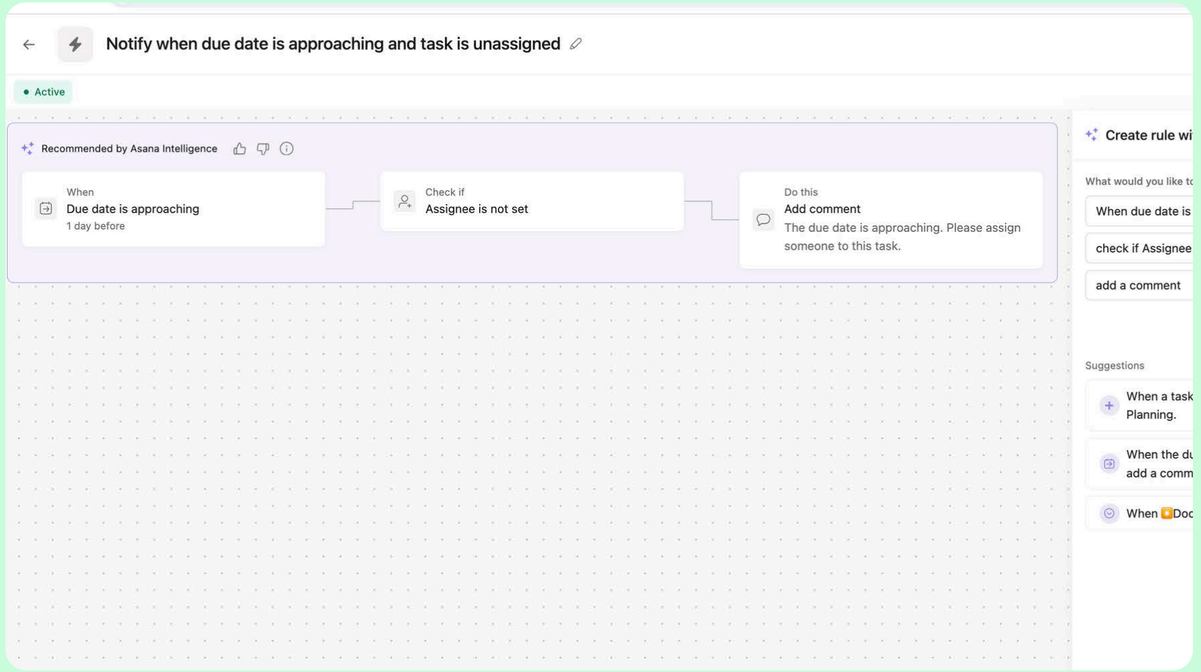
Give AI a few simple instructions and it will create rules for you. No more wrestling with triggers, conditions, and actions – simply write what you would like to automate, and let AI handle the rest.

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.

Get up to speed on notable changes with smart summaries for portfolios

RESOURCES →

Overview

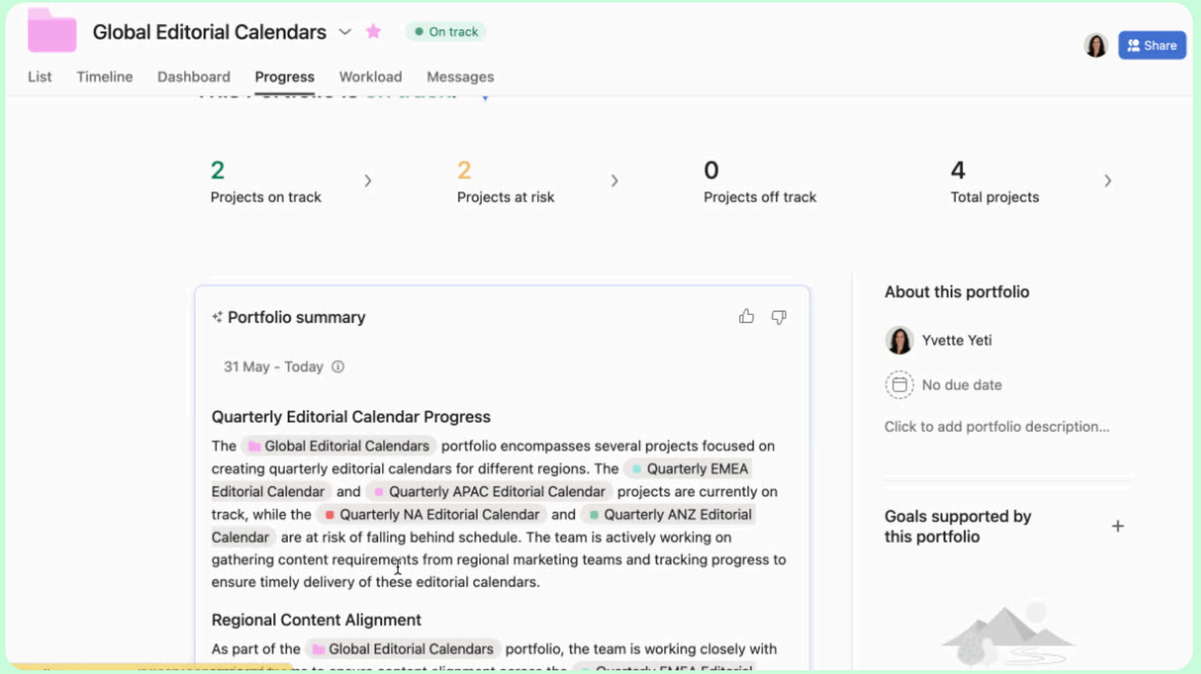
Get a summary of what's happened in a portfolio so you can stay up-to-date on the latest.

Key benefits

- Reduce time spent getting up to speed 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.

Easily draft smart goals optimized for your organization

RESOURCES →

Overview

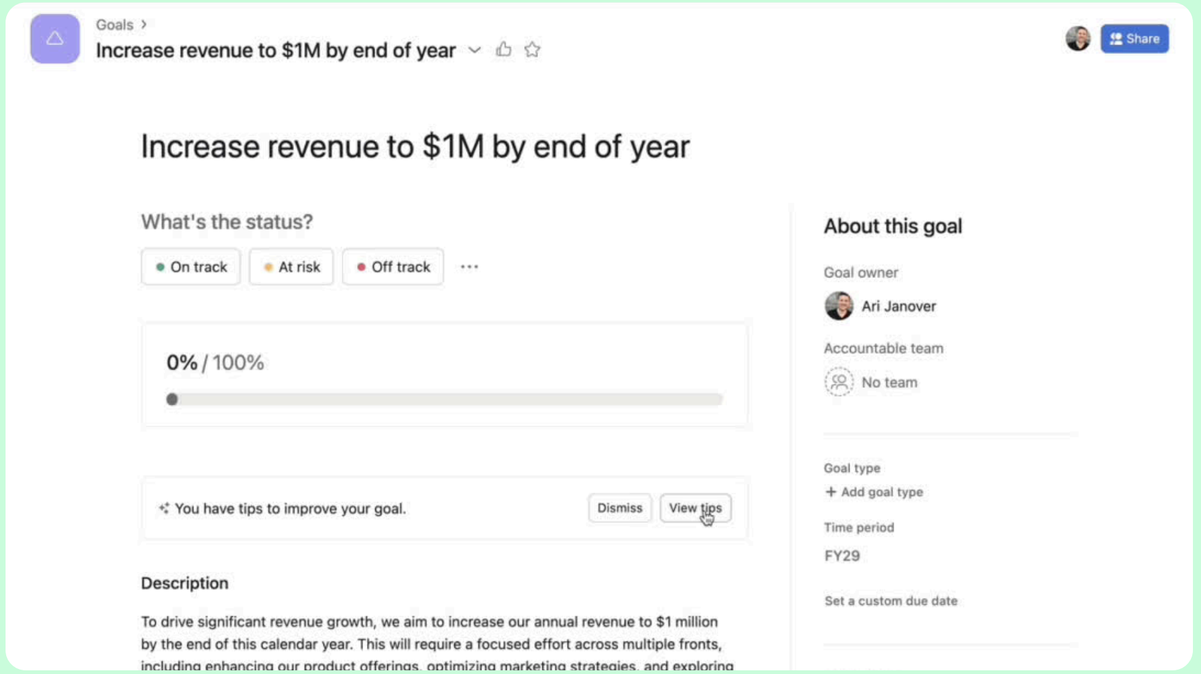
Write more effective goals and standardize them across your organization. With the help of AI, get suggested tips to draft goals based on best practices.

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 get recommendations from AI on how to improve the goal. Before saving you can adjust the tone to reflect desired outcomes.

Thank you

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