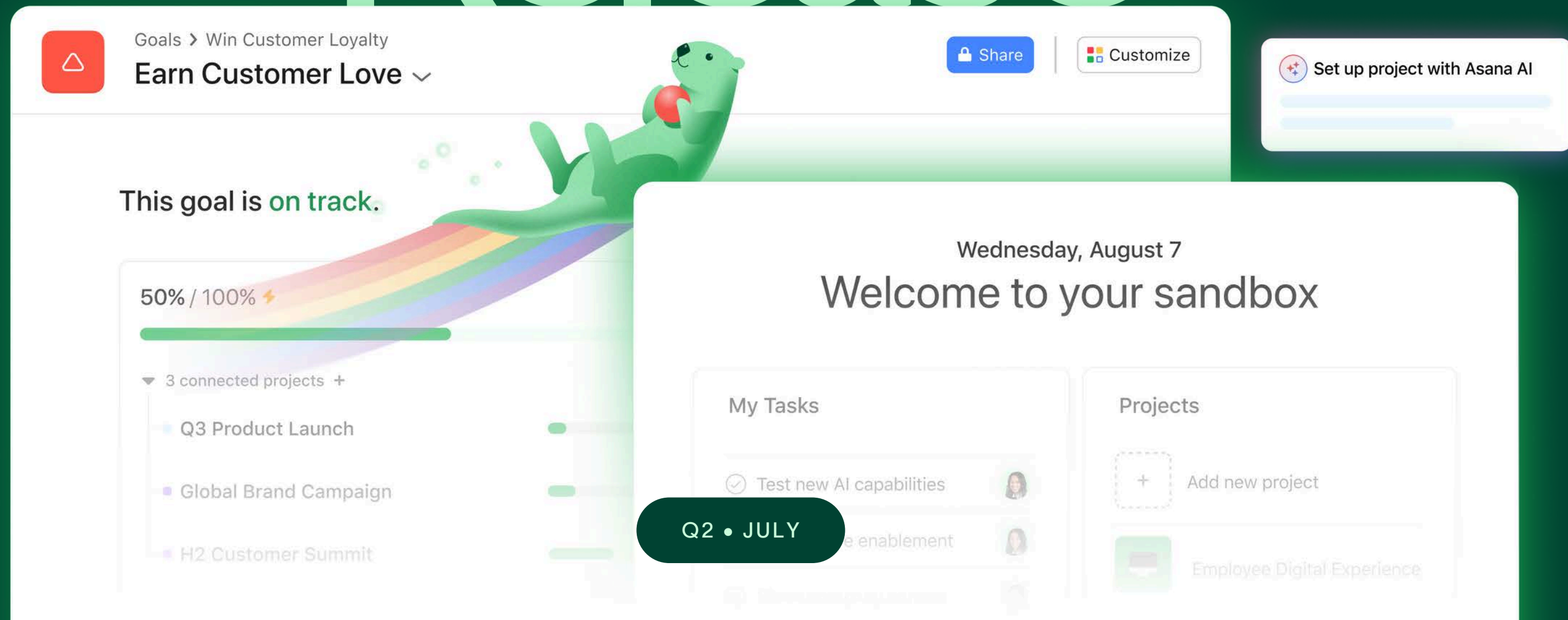


Summer 2024 Release



The screenshot displays the Asana interface with a goal dashboard and a project sandbox. The goal dashboard, titled "Earn Customer Love", shows a progress bar at 50% and a list of three connected projects: "Q3 Product Launch", "Global Brand Campaign", and "H2 Customer Summit". A green bear illustration is positioned above the progress bar. The project sandbox, dated Wednesday, August 7, is titled "Welcome to your sandbox" and features sections for "My Tasks" (with a task "Test new AI capabilities") and "Projects" (with an "Add new project" button and a project "Employee Digital Experience"). A "Share" button and a "Customize" button are visible in the top right of the goal dashboard. A "Set up project with Asana AI" button is also present. A dark green callout box with the text "Q2 • JULY" is overlaid on the bottom of the screenshot.

Goals › Win Customer Loyalty
Earn Customer Love

Share | Customize

Set up project with Asana AI

This goal is on track.

50% / 100%

3 connected projects

- Q3 Product Launch
- Global Brand Campaign
- H2 Customer Summit

Wednesday, August 7

Welcome to your sandbox

My Tasks

- Test new AI capabilities

Projects

- Add new project
- Employee Digital Experience

Q2 • JULY

Table of contents

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- [VIEW SECTION ↓](#) Integrations & API
- [VIEW SECTION ↓](#) Asana AI

SUMMER RELEASE 2024

Project & Task Management





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

The screenshot displays the Asana interface for a project titled "2023 Annual Planning". At the top, there are navigation tabs: Overview, List, Board, Timeline, Calendar, and Gantt. The "List" tab is selected. Below the tabs, there are two sections: "In progress" and "Complete". The "In progress" section contains three tasks, each with a checkmark icon, a description, a due date, and a team label:

Task	Due Date	Team
Map strategic questions	Wednesday	Operations
Analyze 2022 performance	Friday	Analytics
Schedule kickoff	Sept 8	Operations

The "Complete" section is currently empty.

Kick-off projects effortlessly with smart projects

RESOURCES →



Overview

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



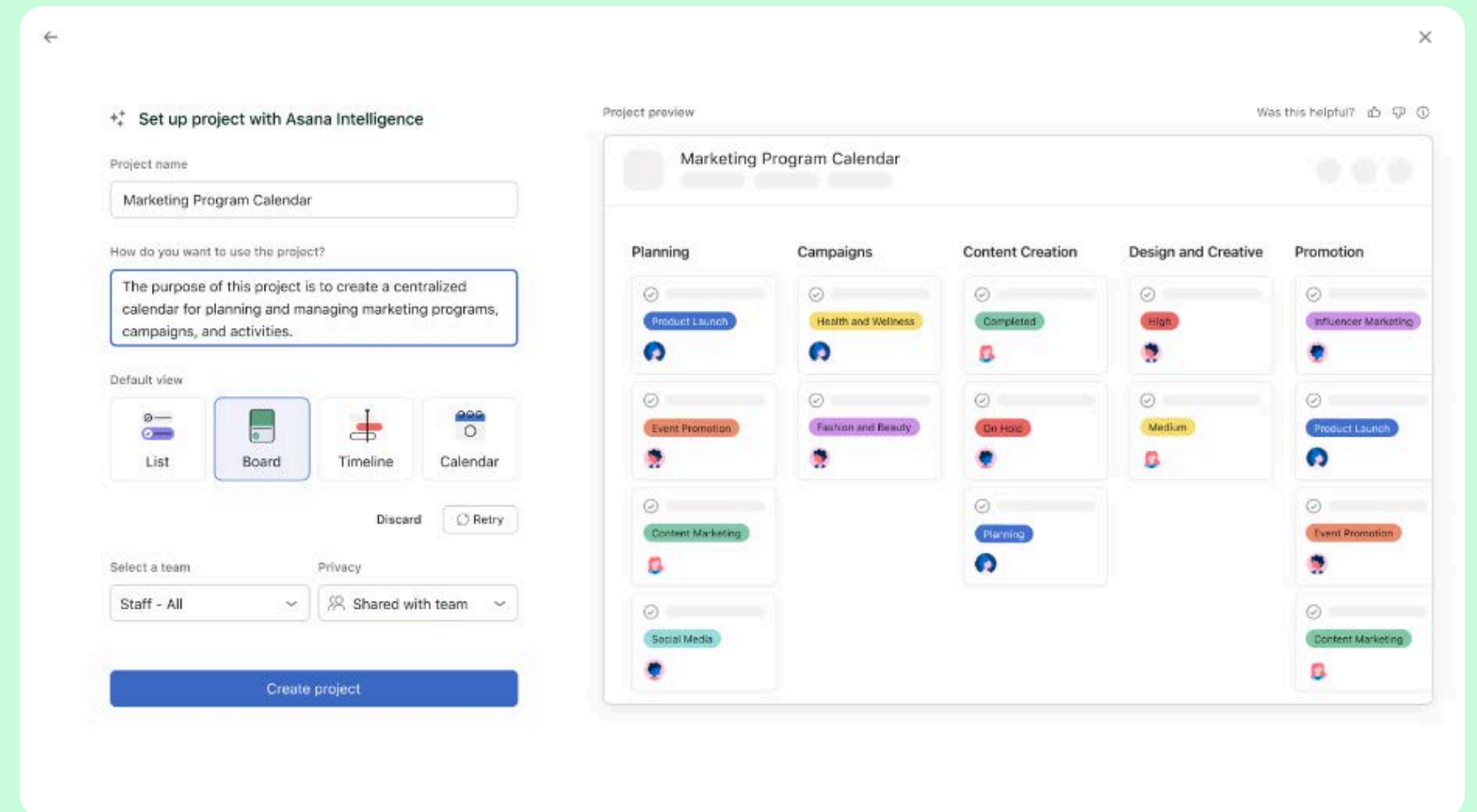
Key benefits

- 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.



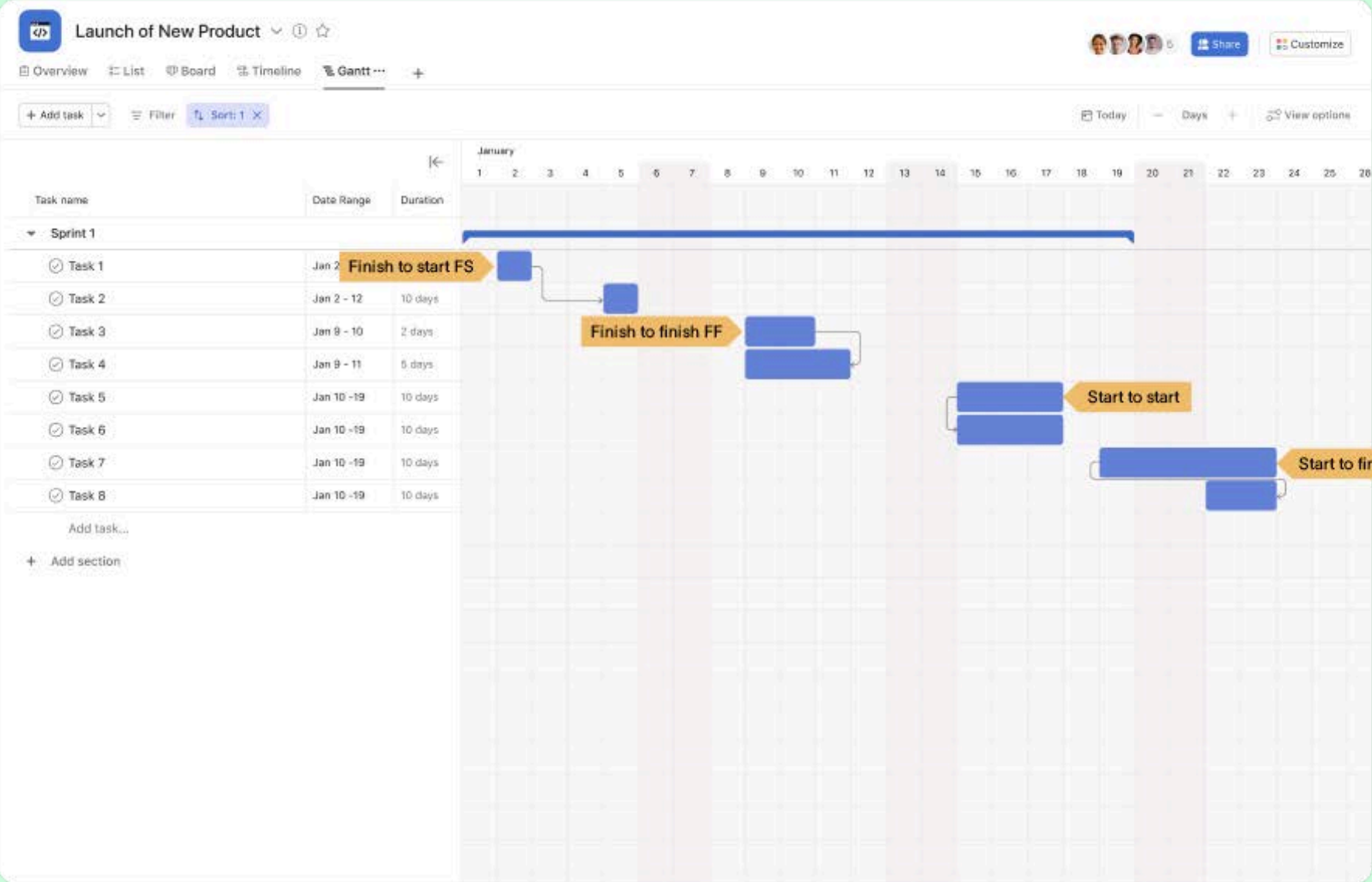
Key benefits

- 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.



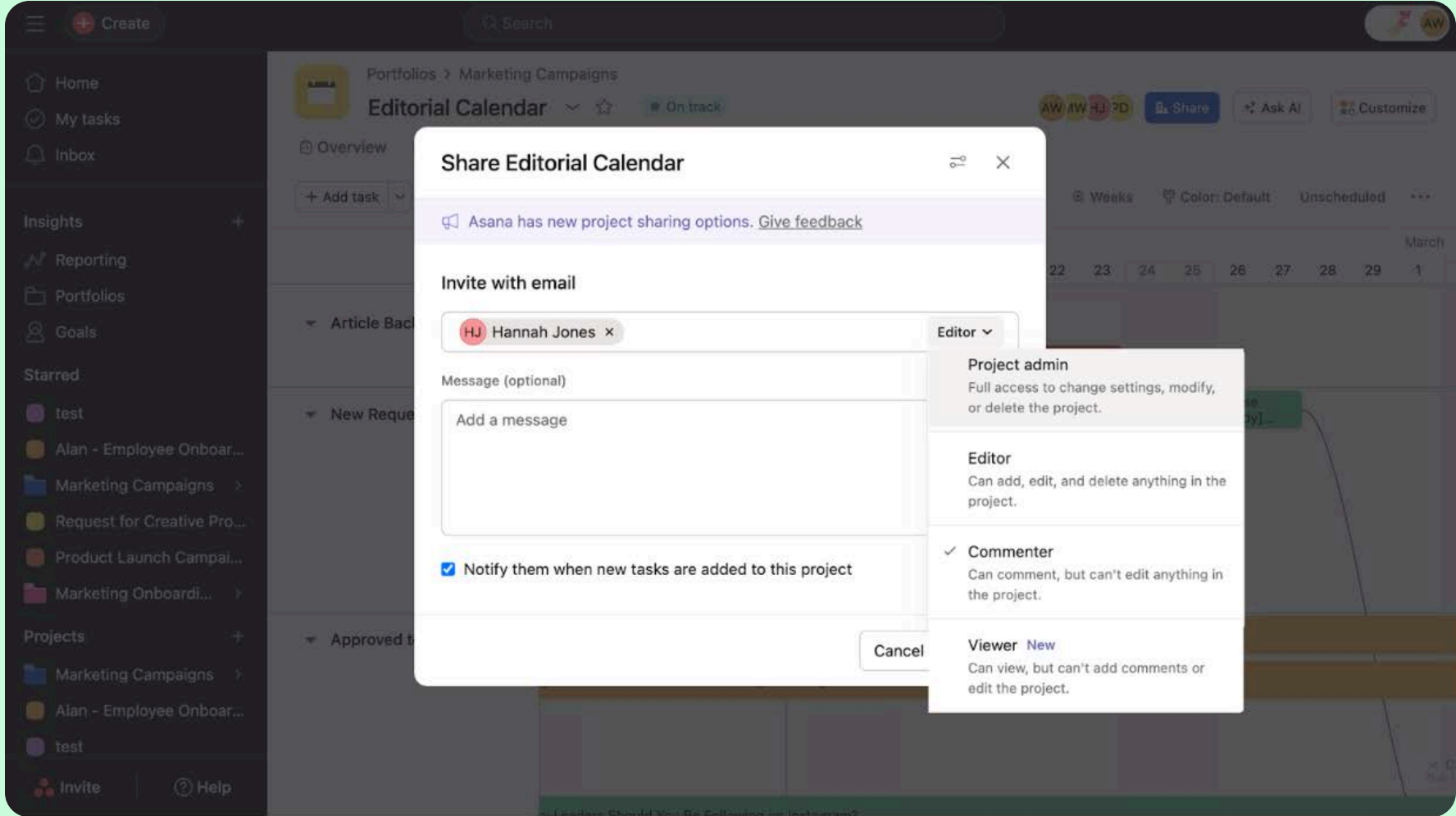
Key benefits

- 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.



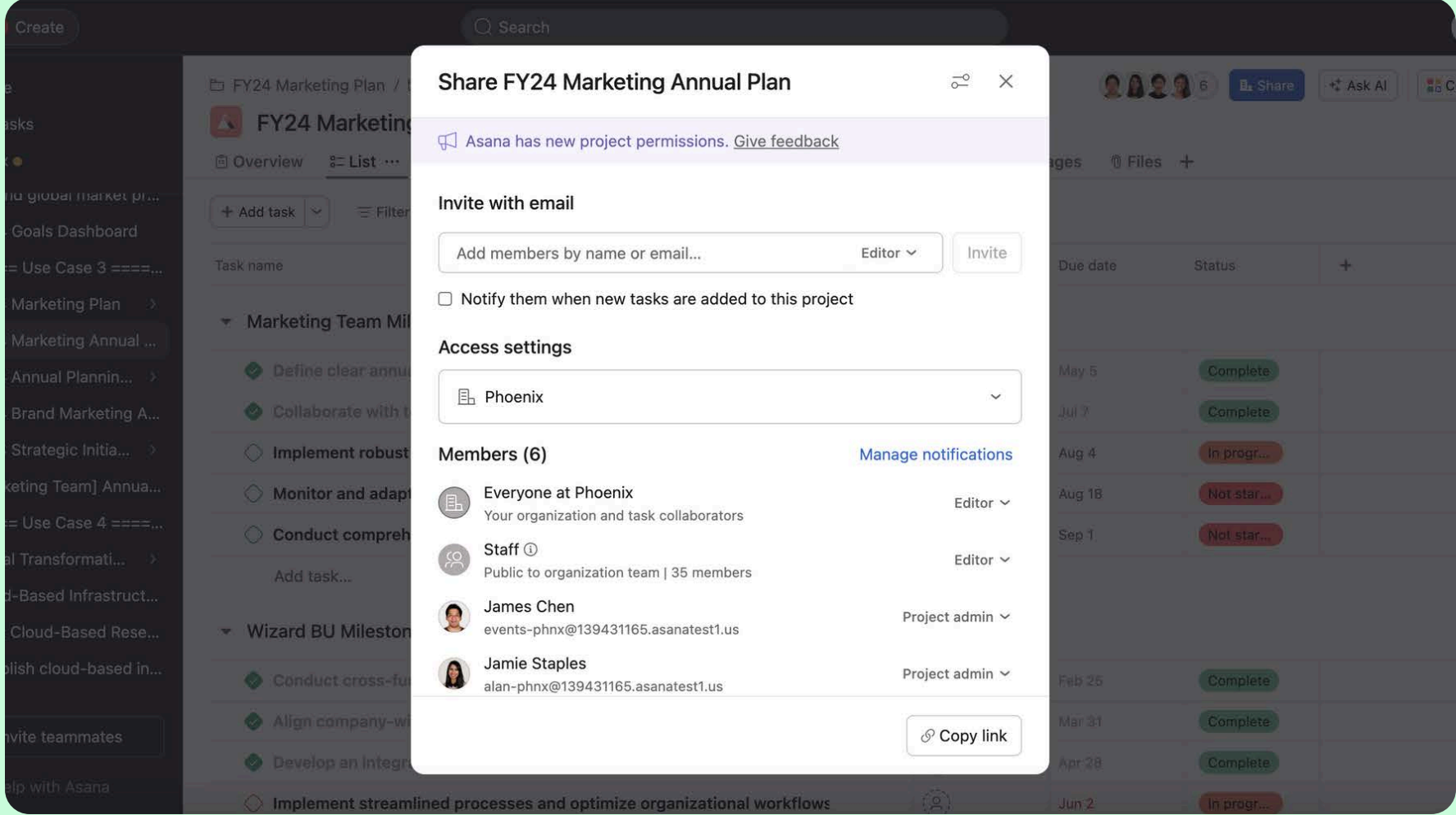
Key benefits

- 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.



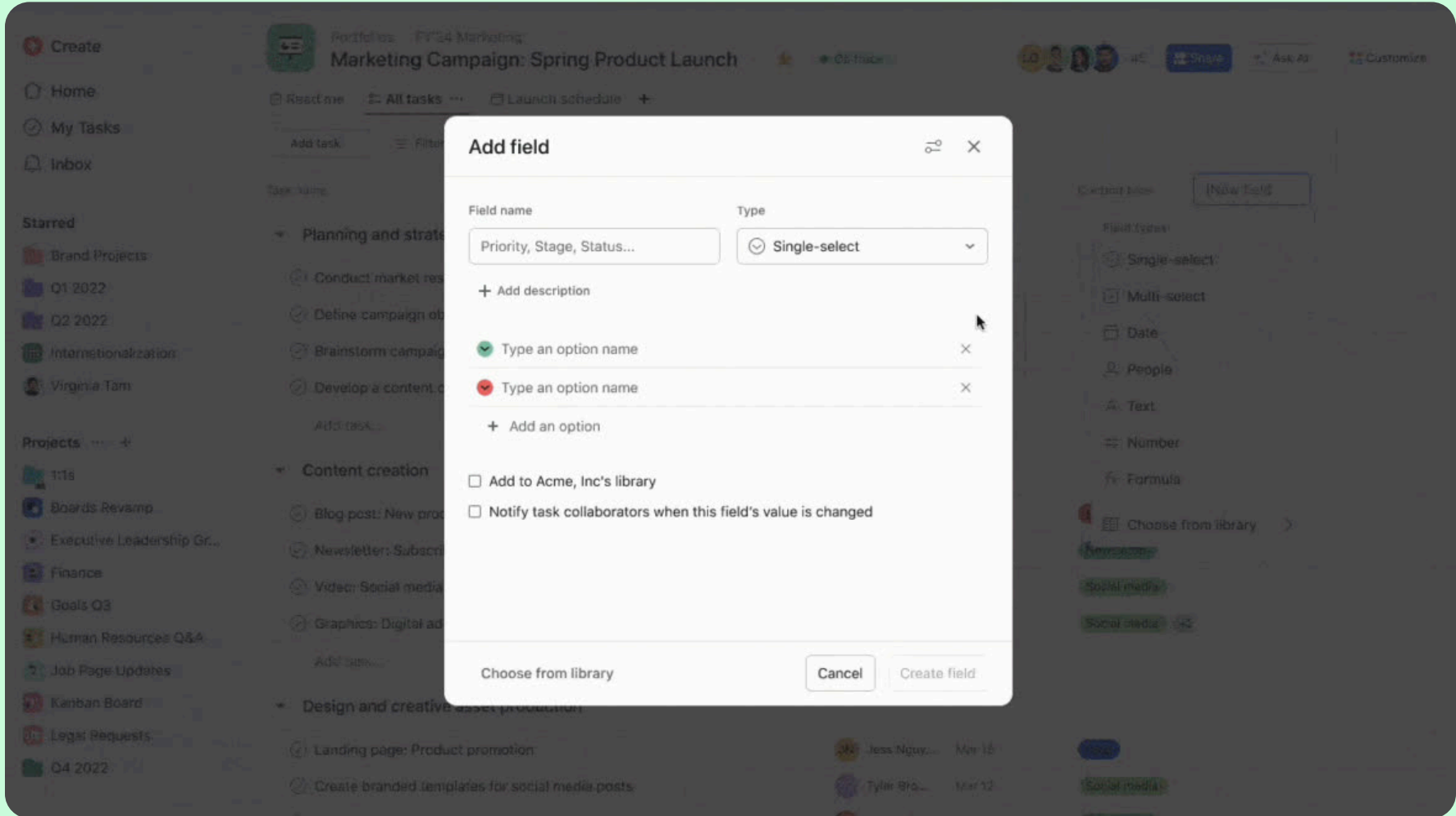
Key benefits

- 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



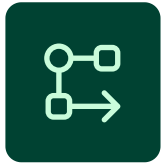
How it works

This update allows users to determine who can edit the details and settings of a custom field.

SUMMER RELEASE 2024

Workflows & Automations





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

The screenshot displays two workflow bundles side-by-side. The left bundle is for the 'Intake' section and contains three actions: 'Assign to Kat Mooney' (with a user profile picture), 'Comment "Hey Kat! Reminder to..."', and a 'More actions...' button. The right bundle is for the 'Production' section and contains two actions: 'Send message to...' (with a multi-person icon) and 'Add 9 collaborator...' (with a multi-person icon), plus a 'More actions...' button. Both bundles have a '+' icon on the left side, indicating they can be added to a workflow.

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.



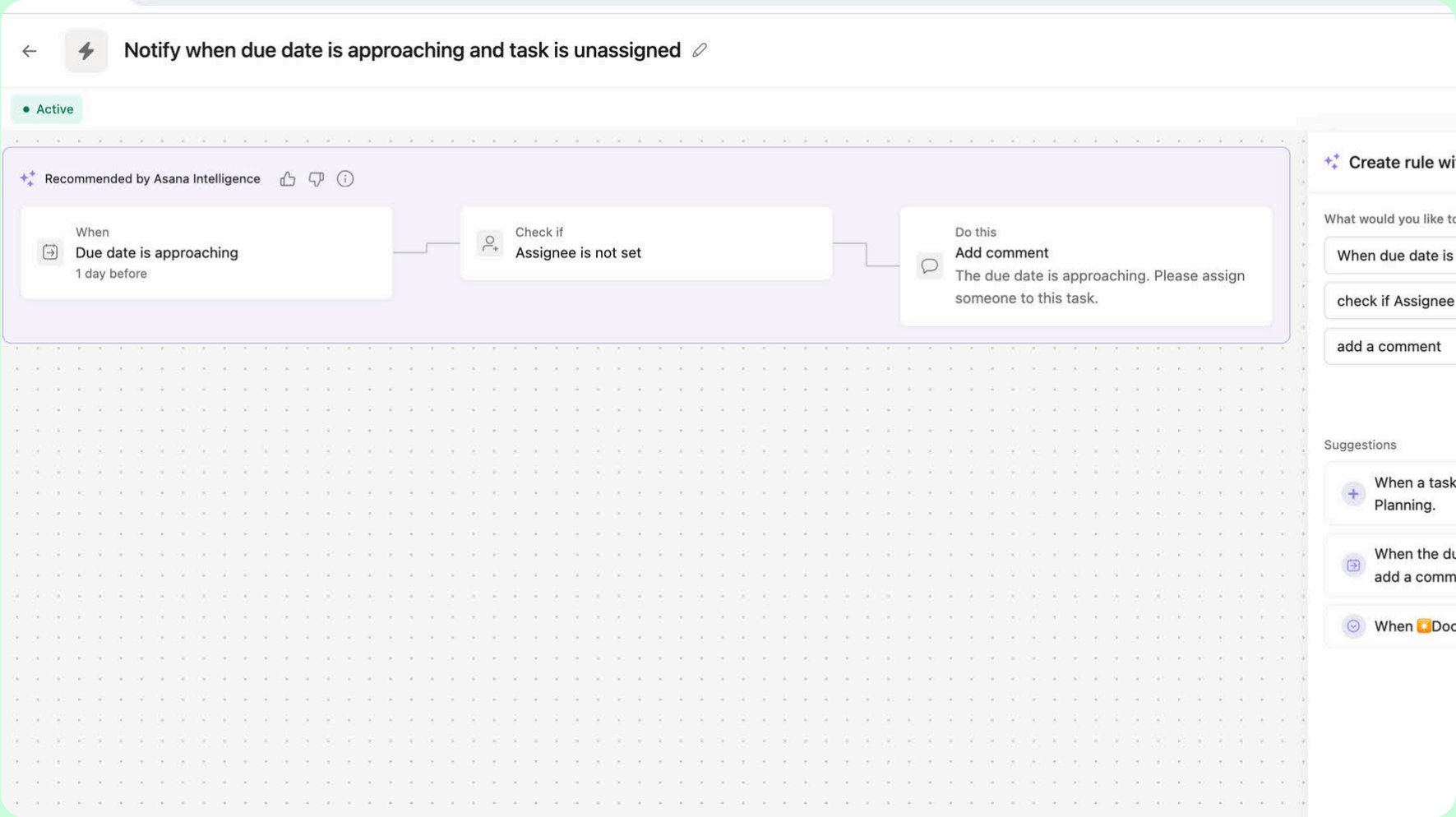
Key benefits

- 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.



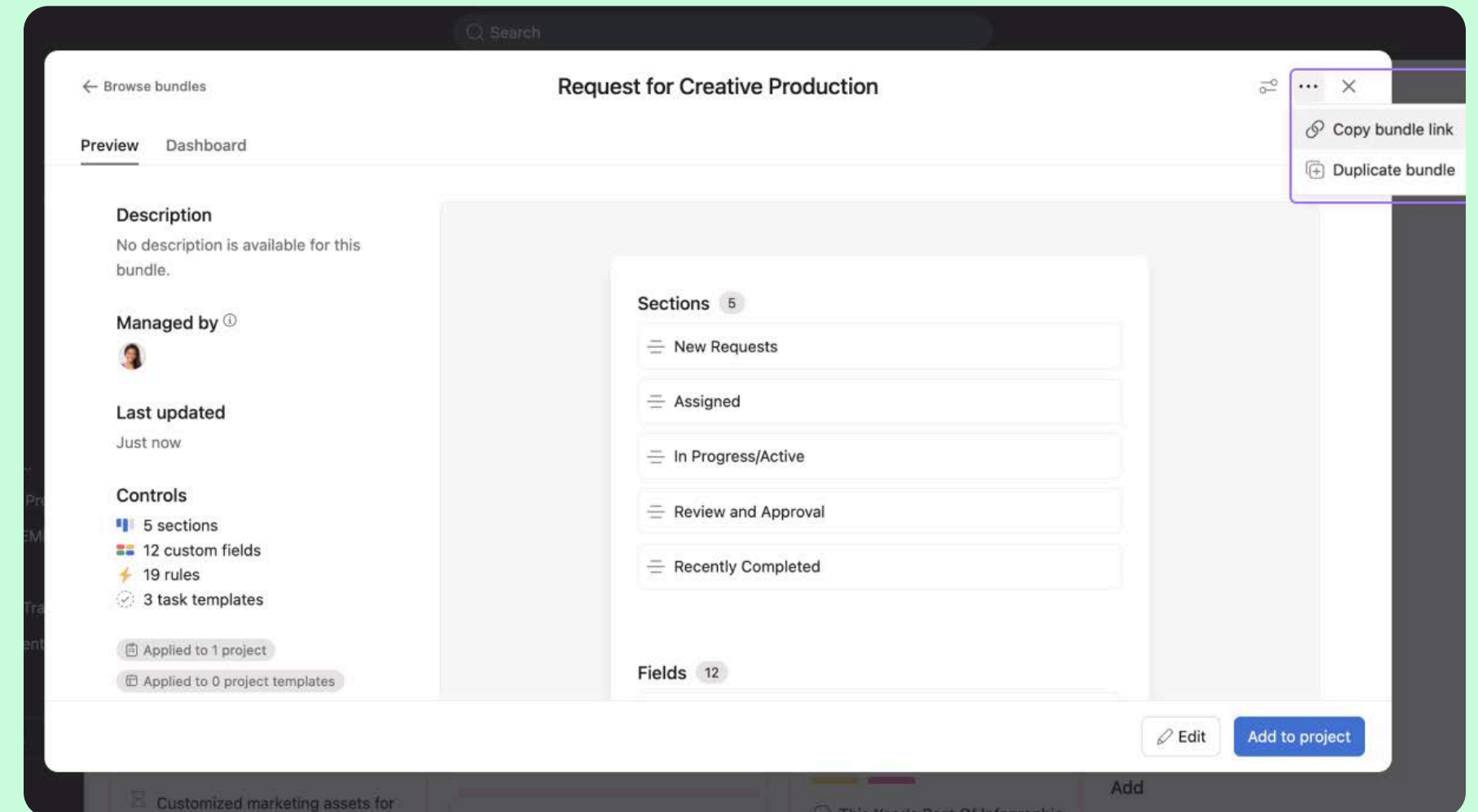
Key benefits

- 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



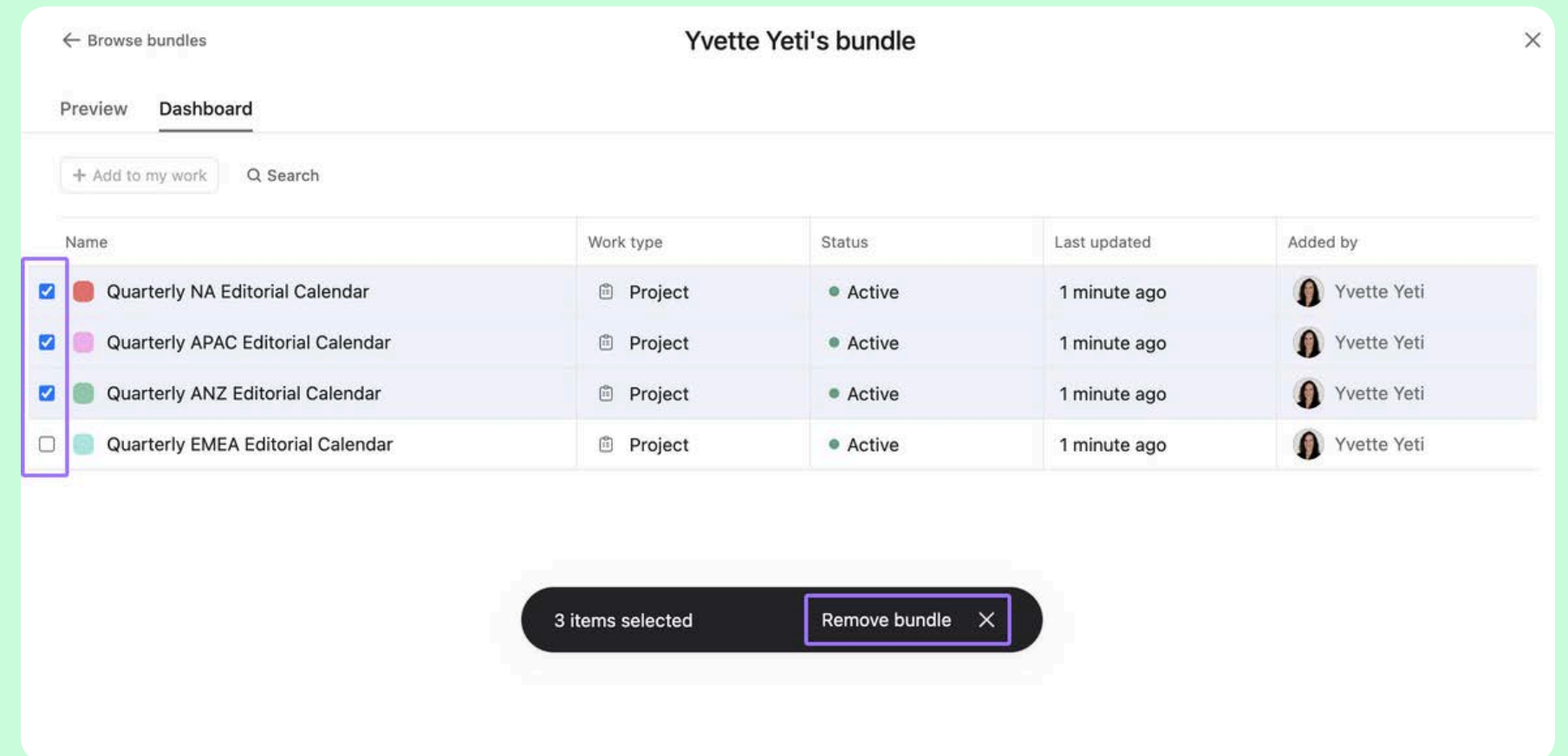
Key benefits

- 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.

SUMMER RELEASE 2024

Portfolio Management

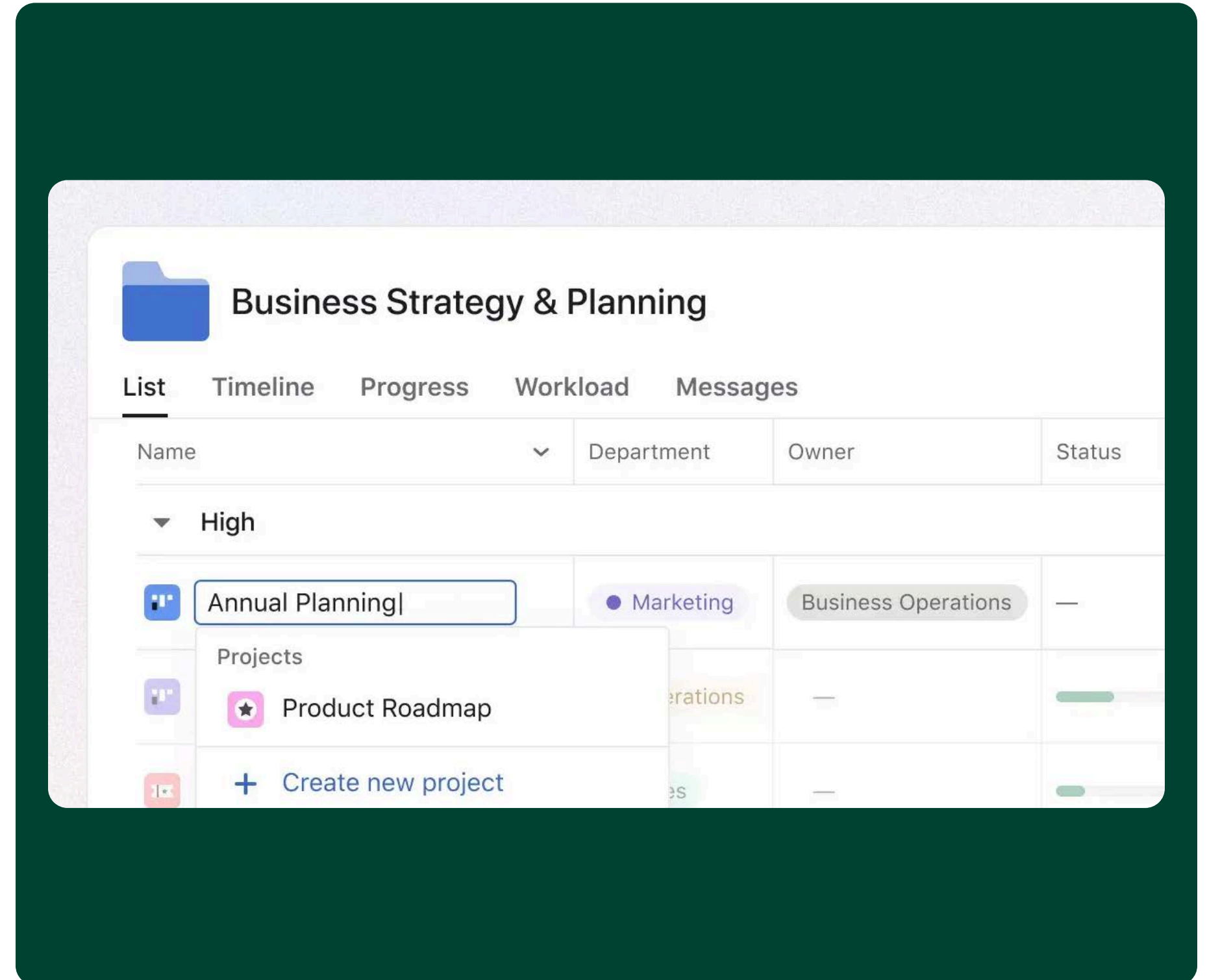




Portfolios

[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.



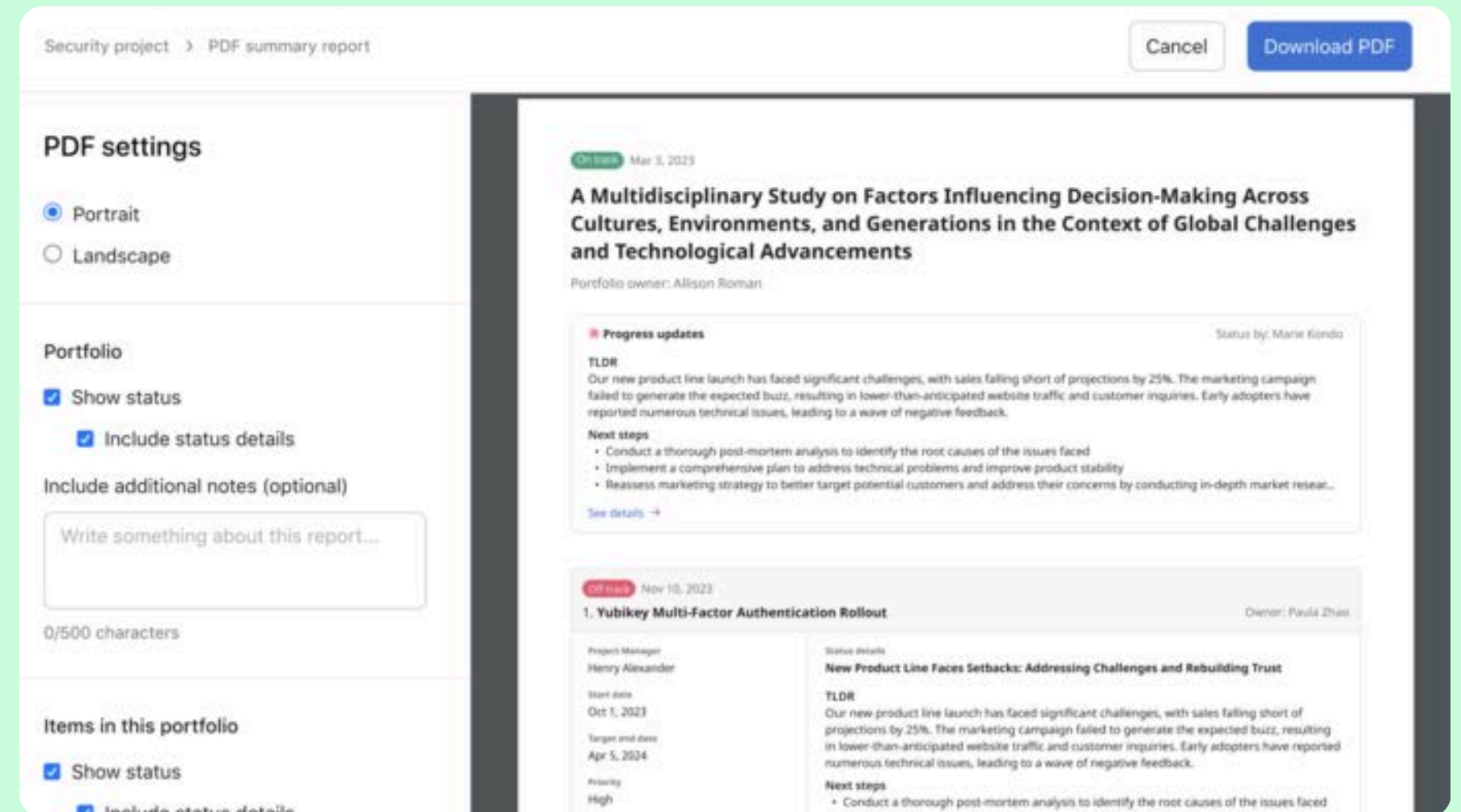
Key benefits

- 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.



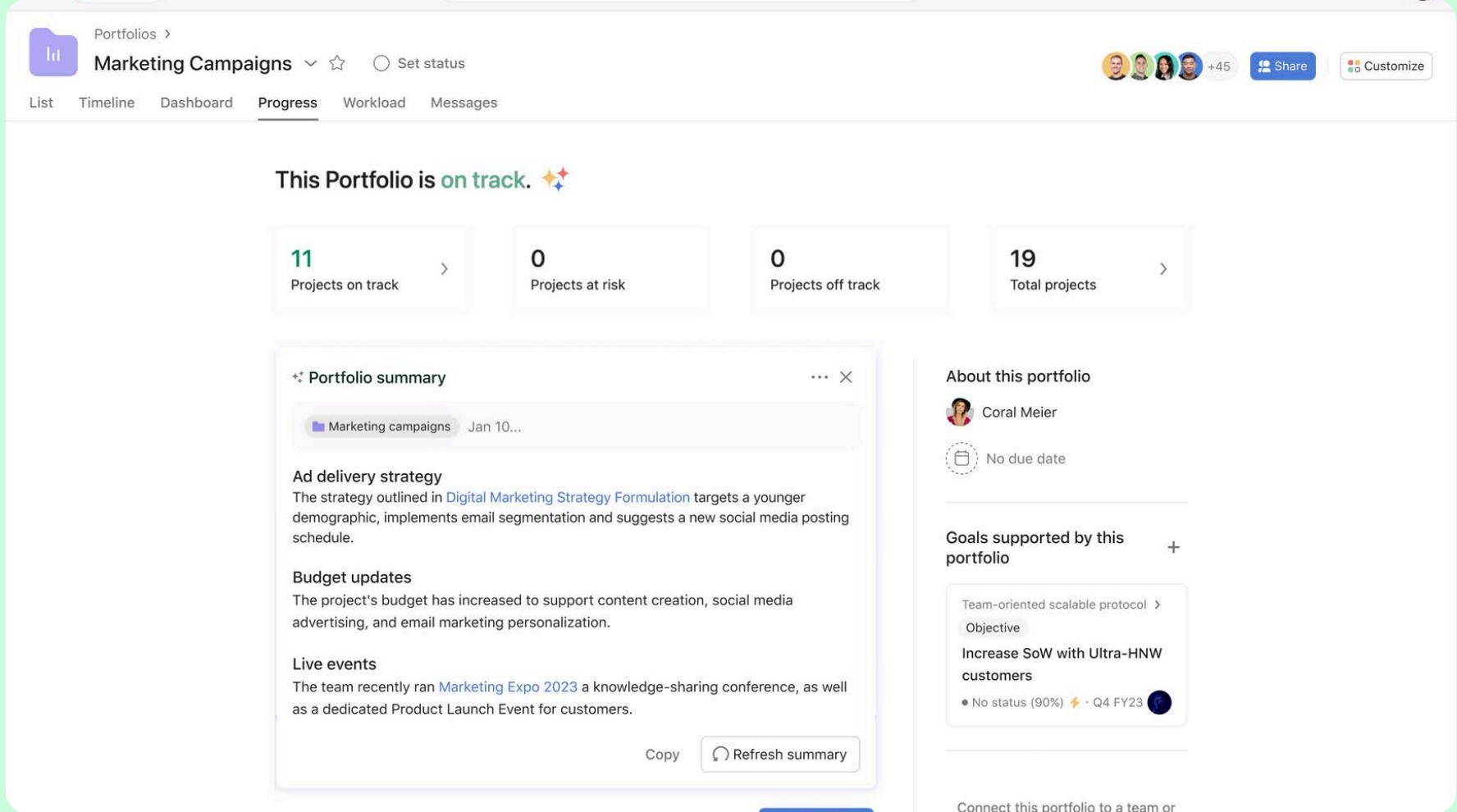
Key benefits

- 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.



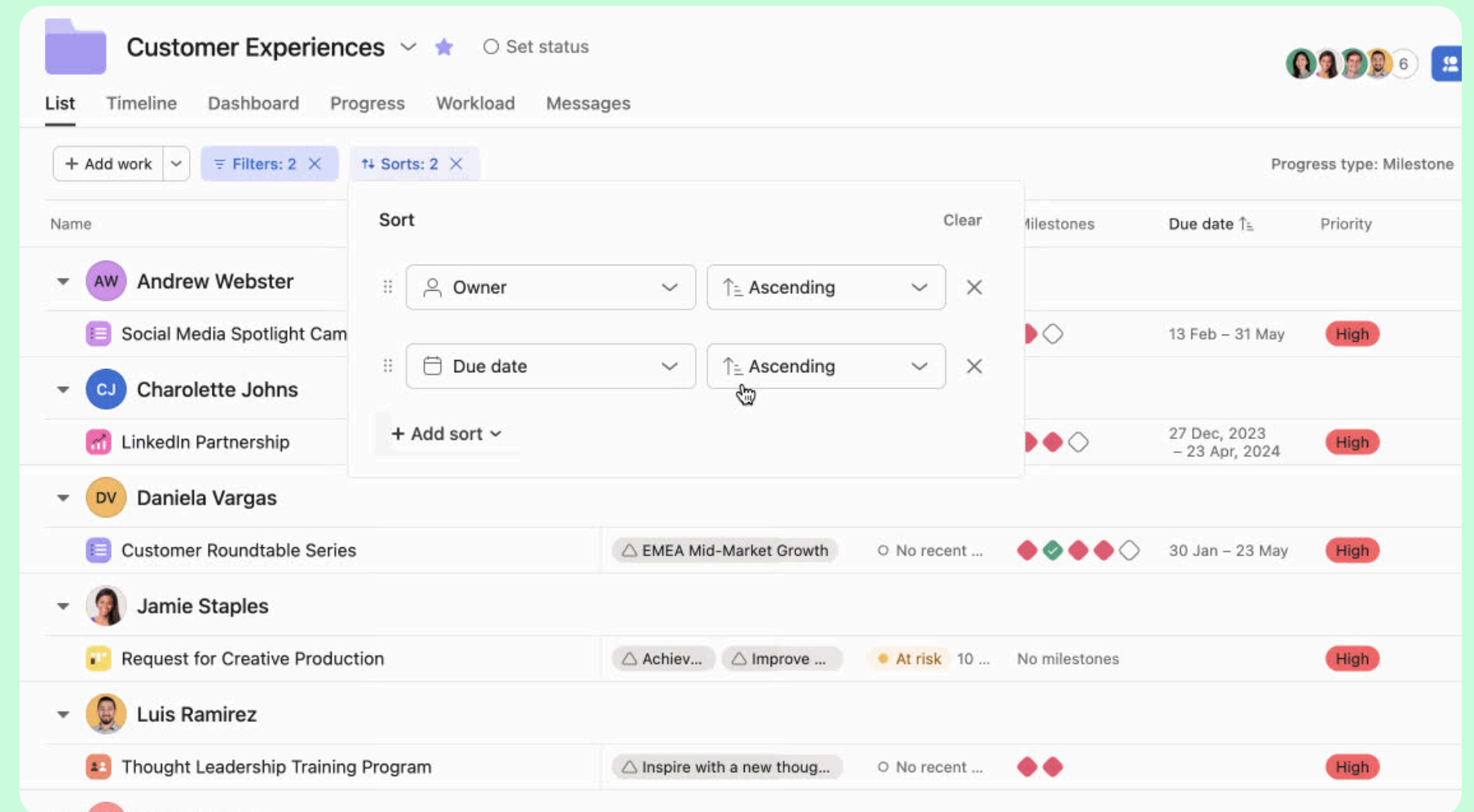
Key benefits

- 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.

SUMMER RELEASE 2024

Goal Management



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

Created by Asana Intelligence

Here's a SMART goal generated to drive more consistency across your organization.

Grow pipeline by 30% with new events ⚡

This goal is **on track**.

50% / 100% ⚡

3 connected projects

- CSAT Tracking 20% ⭐
- NPS Global Roadmap 30% ⭐
- Customer Marketing Init... 70% ⭐

About this goal

Owned by Coral Meier

Accountable team Marketing

Goal type Objective

Time period H2 FY23

Due Date Dec 15

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

The screenshot shows the Asana goal management interface. At the top, it says 'Goals >' and 'Increase revenue to \$1M by end of year' with a dropdown arrow, a thumbs-up icon, and a star icon. In the top right corner, there is a 'Share' button with a user profile icon. The main heading is 'Increase revenue to \$1M by end of year'. Below this, there is a section 'What's the status?' with three buttons: 'On track' (green), 'At risk' (orange), and 'Off track' (red), followed by a three-dot menu. A progress bar shows '0% / 100%' with a small black dot at the beginning. Below the progress bar, there is a message: '👉 You have tips to improve your goal.' with 'Dismiss' and 'View tips' buttons. The 'View tips' button is highlighted with a mouse cursor. At the bottom, there is a 'Description' section with the text: 'To drive significant revenue growth, we aim to increase our annual revenue to \$1 million by the end of this calendar year. This will require a focused effort across multiple fronts, including enhancing our product offerings, optimizing marketing strategies, and exploring...'. On the right side, there is a sidebar titled 'About this goal' with the following information: 'Goal owner: Ari Janover', 'Accountable team: No team', 'Goal type: + Add goal type', 'Time period: FY29', and 'Set a custom due date'.

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

Weights

Default weights Custom weights

Custom weights
Editors can assign weights to each connected sub-goal. Sub-goals with higher weights count toward progress more.

Name	Weight
△ Plan social meet & greet with Walmart launch team	50%
△ Generate \$500K in revenue on launch day with Wal...	5%
△ Marketing collateral for Walmart launch	15%
△ Approved brand assets for marketing collateral	15%
△ Prepare field team to greet customers on Walmart la...	15%
△ Achieve 13% gross margins on Walmart launch day s...	10%

Weights total ⚠️ 110%

Cancel Save

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.



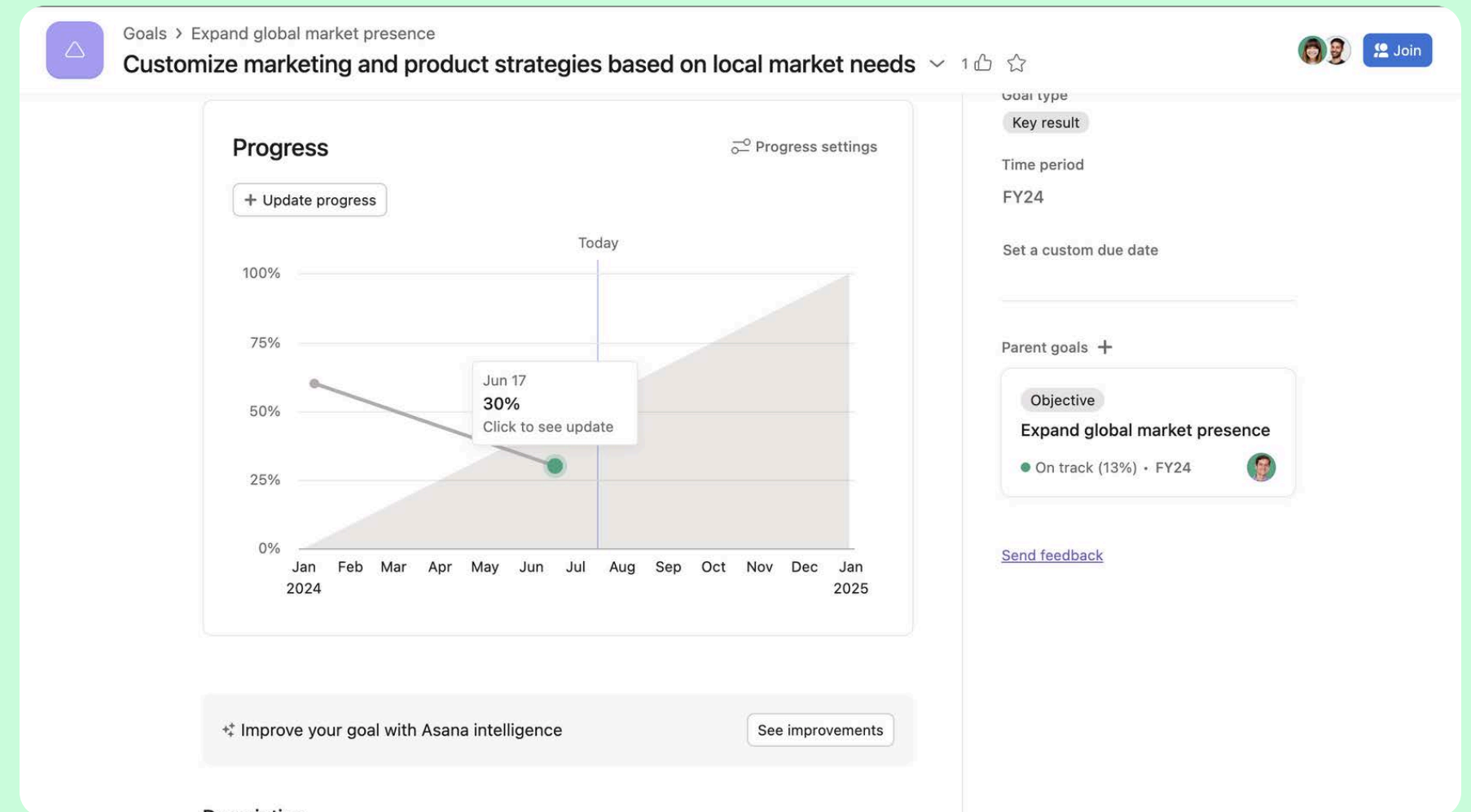
Key benefits

- 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.

SUMMER RELEASE 2024

Resource Management





Resource Management

[LEARN MORE →](#)

- ✓ Capacity planning
Staff projects efficiently and effectively

The screenshot displays the 'Capacity Plan' reporting tool in Asana. It shows a grid for the year 2024, with columns for March, April, and May. Resources are listed on the left, including Clarke Higbee (Business Intelligence Developer), Maria Vaccaro (Business Intelligence Lead), and Lydia Gouse (Database Administrator). Projects are listed in the middle, such as Data Warehouse Migration, Metrics Consolidation, and Incident Tracking & Resolution. Progress bars indicate the percentage of capacity used for each project in each month. A pop-up window shows time tracking details for the current session and previous sessions.

		2024		
		March	April	May
>	Clarke Higbee Business Intelligence Developer			
∨	Maria Vaccaro Business Intelligence Lead	100%	75%	50%
•	Data Warehouse Migration	50%		
•	Metrics Consolidation		50%	
•	Incident Tracking & Resolution		25%	
>	Lydia Gouse Database Administrator			

Total time tracked: **3h 14m**

Current session: **01:04:58**

20m Oct 23

1h 24m Oct 28

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.



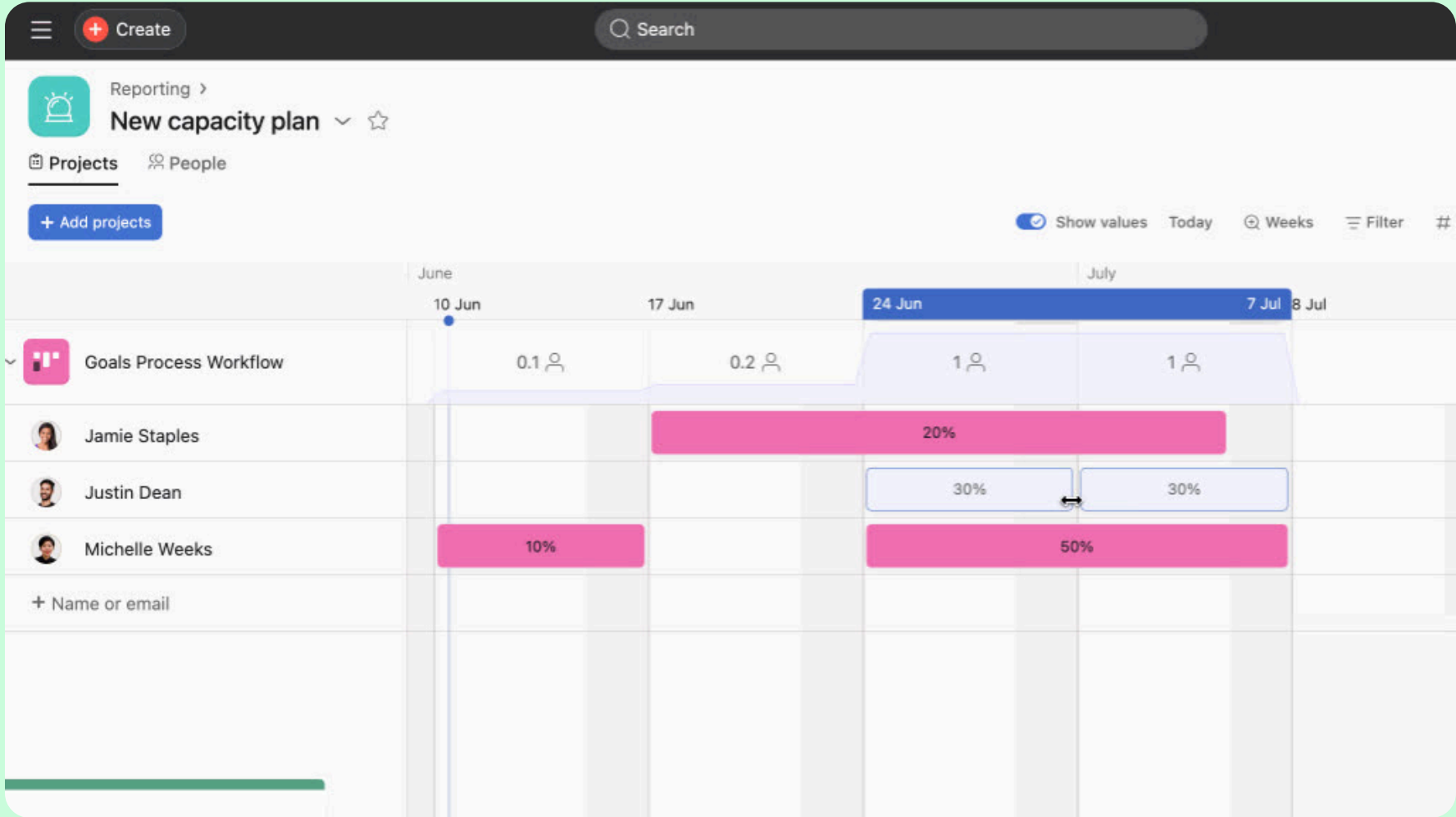
Key benefits

- 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

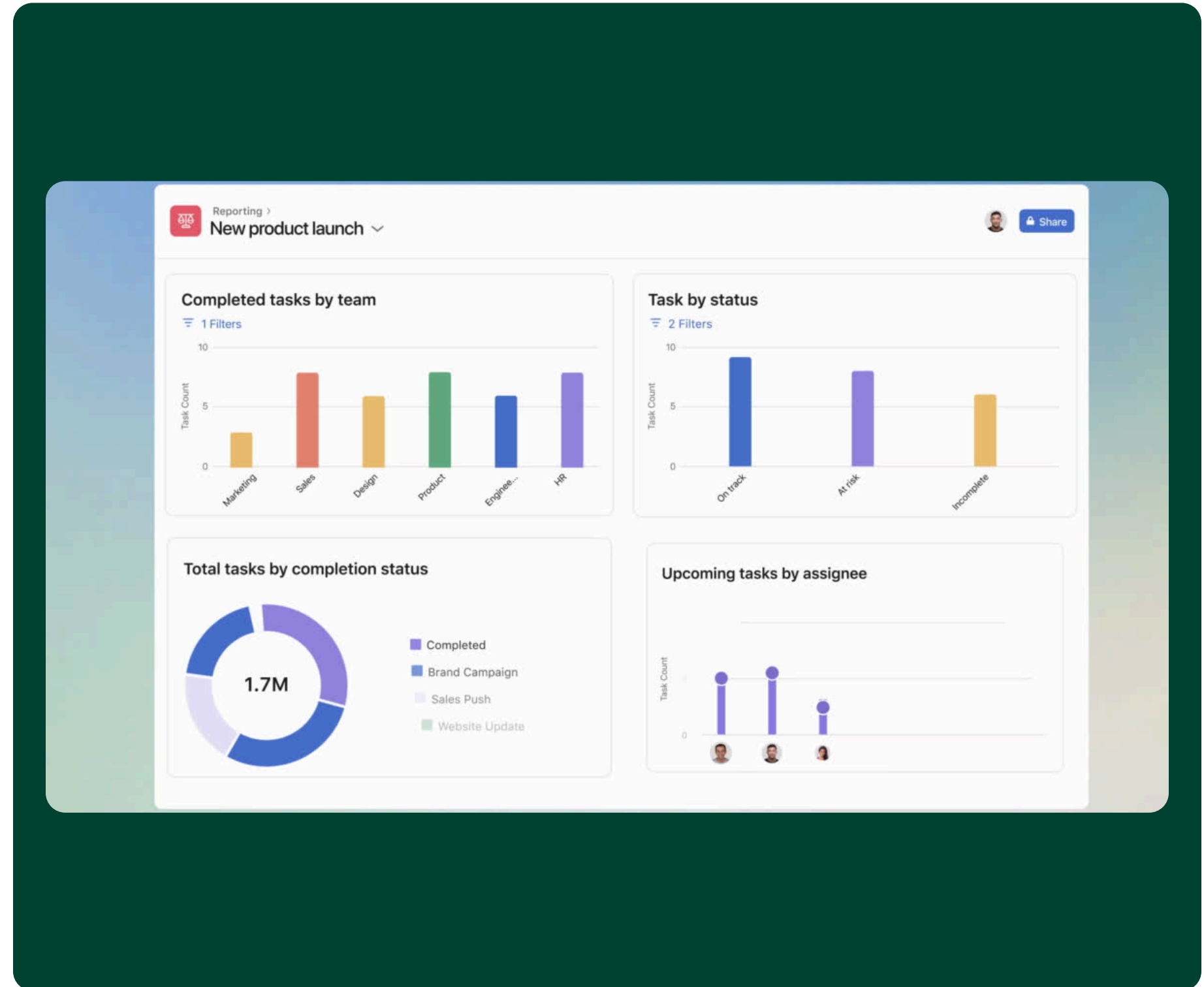
You can add projects or entire portfolios from the projects tab.

SUMMER RELEASE 2024

Reporting

✓ 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.



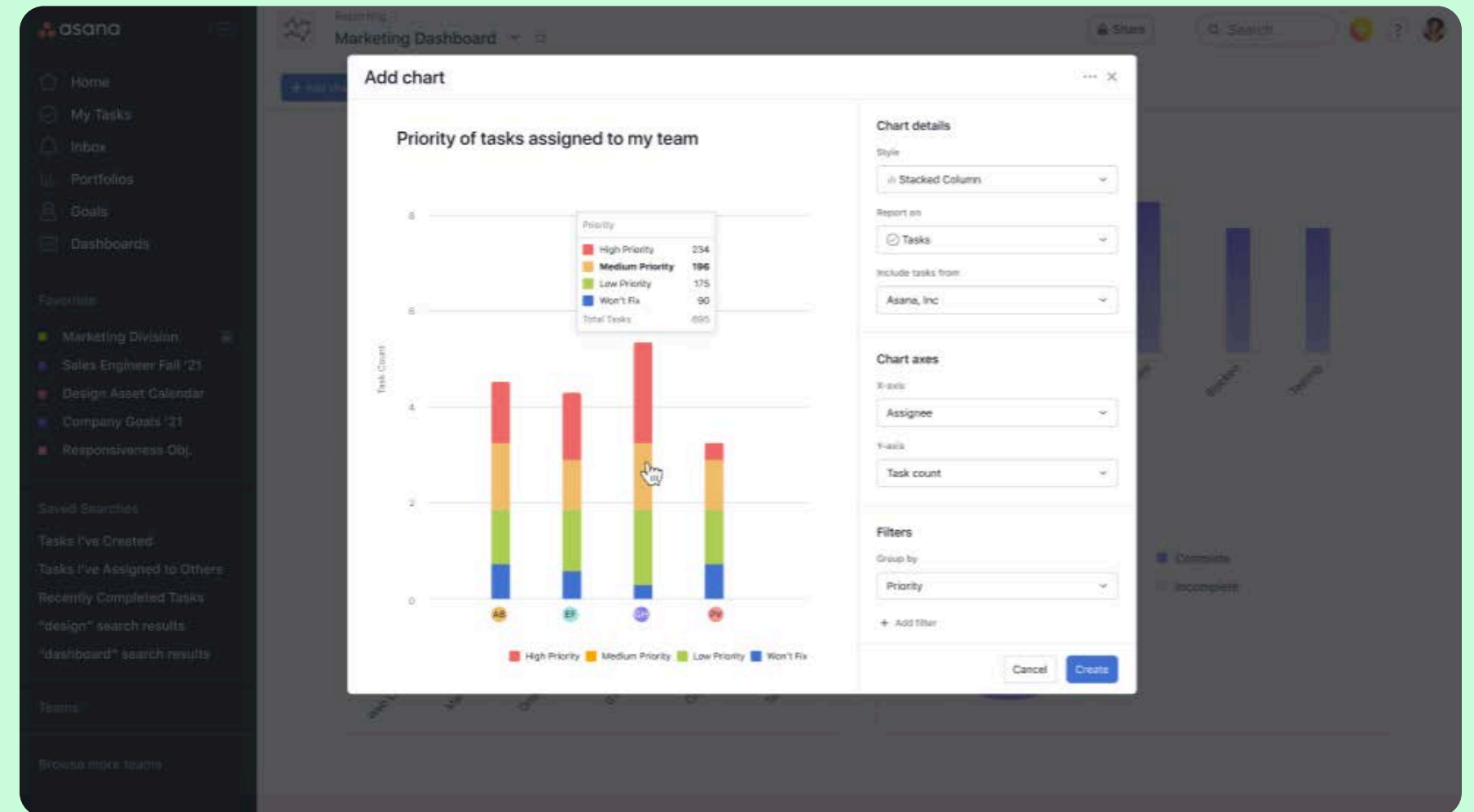
Key benefits

- 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.

SUMMER RELEASE 2024

Admin & Security



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

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 >

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.



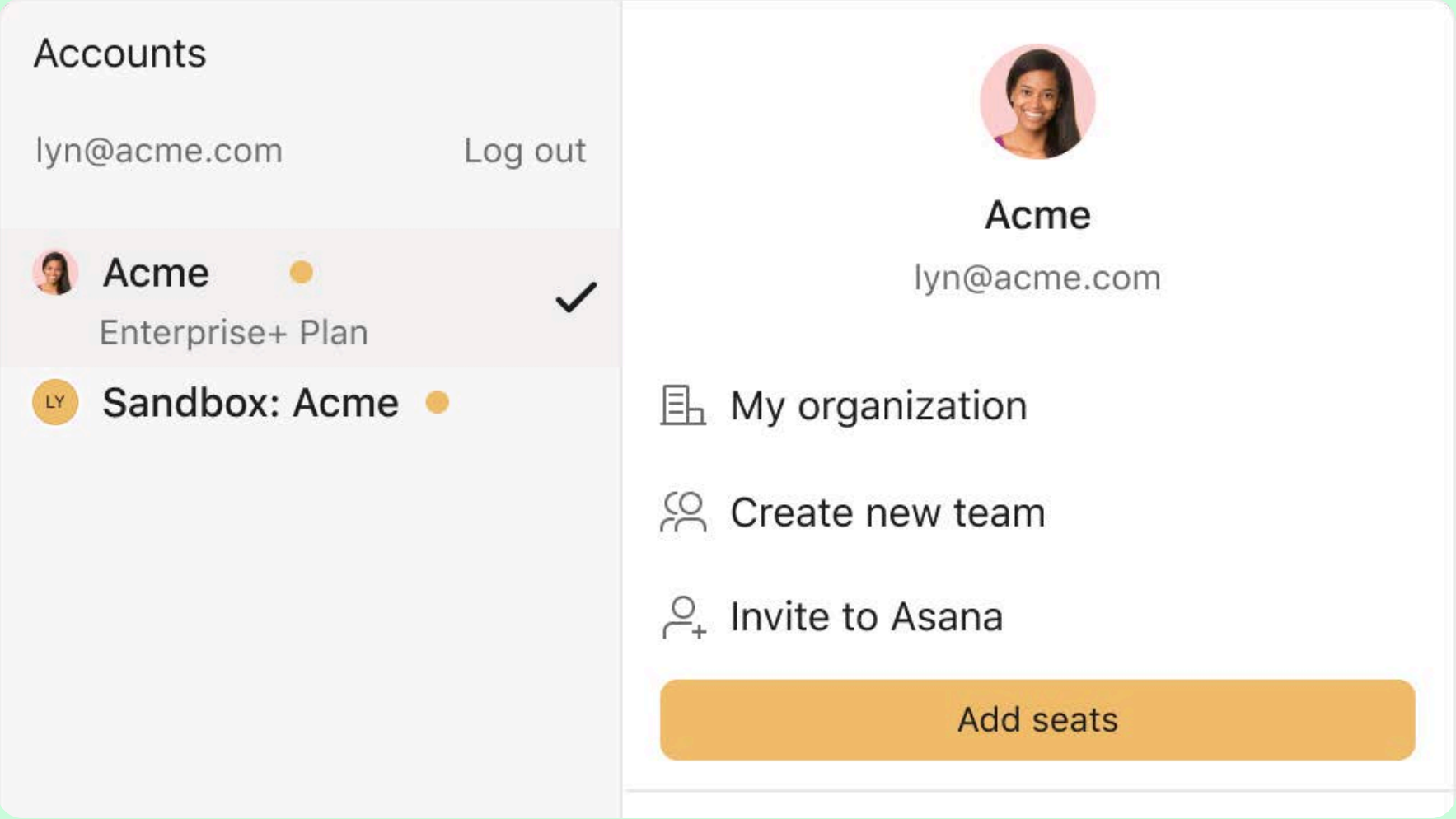
Key benefits

- 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.



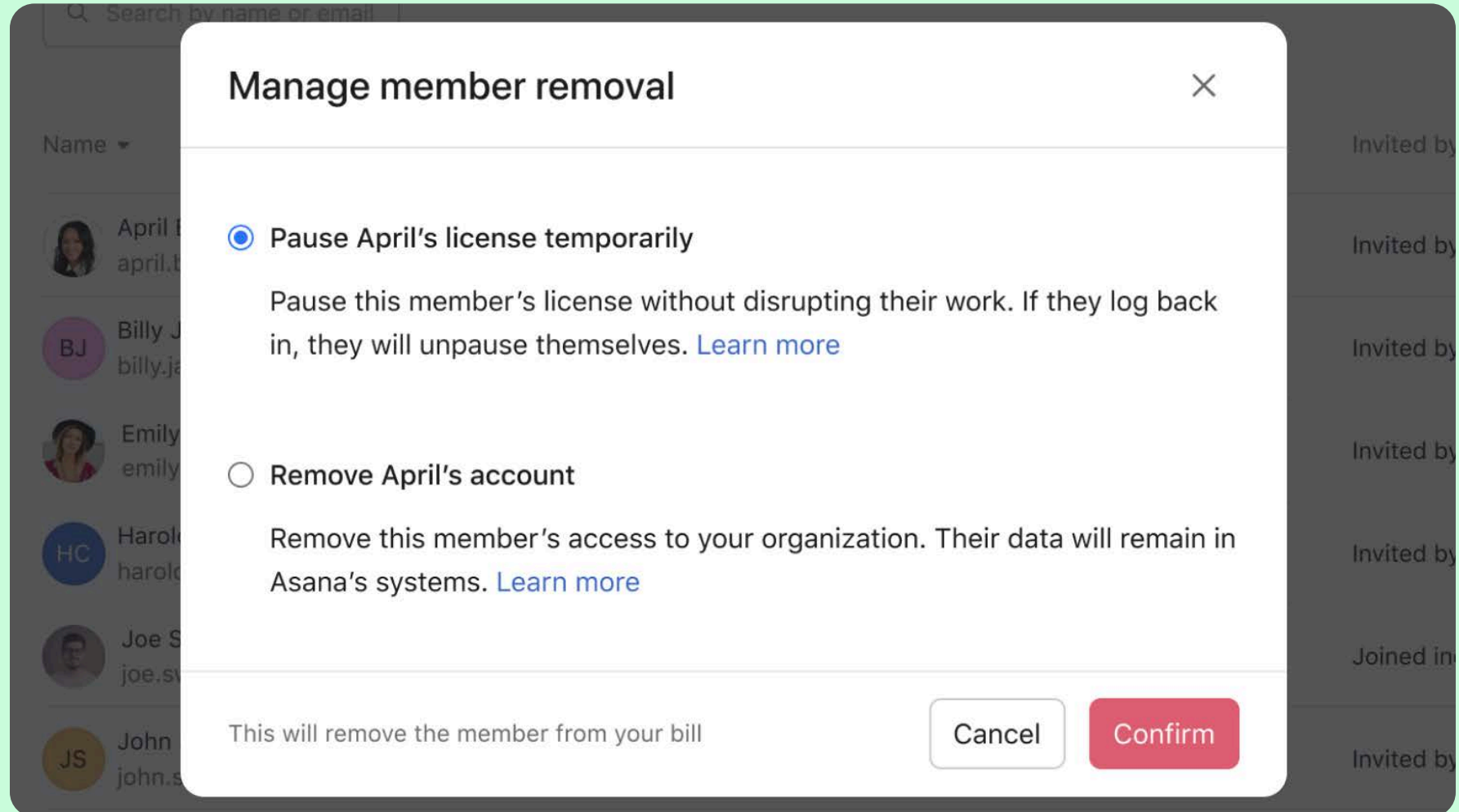
Key benefits

- 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.

SUMMER RELEASE 2024

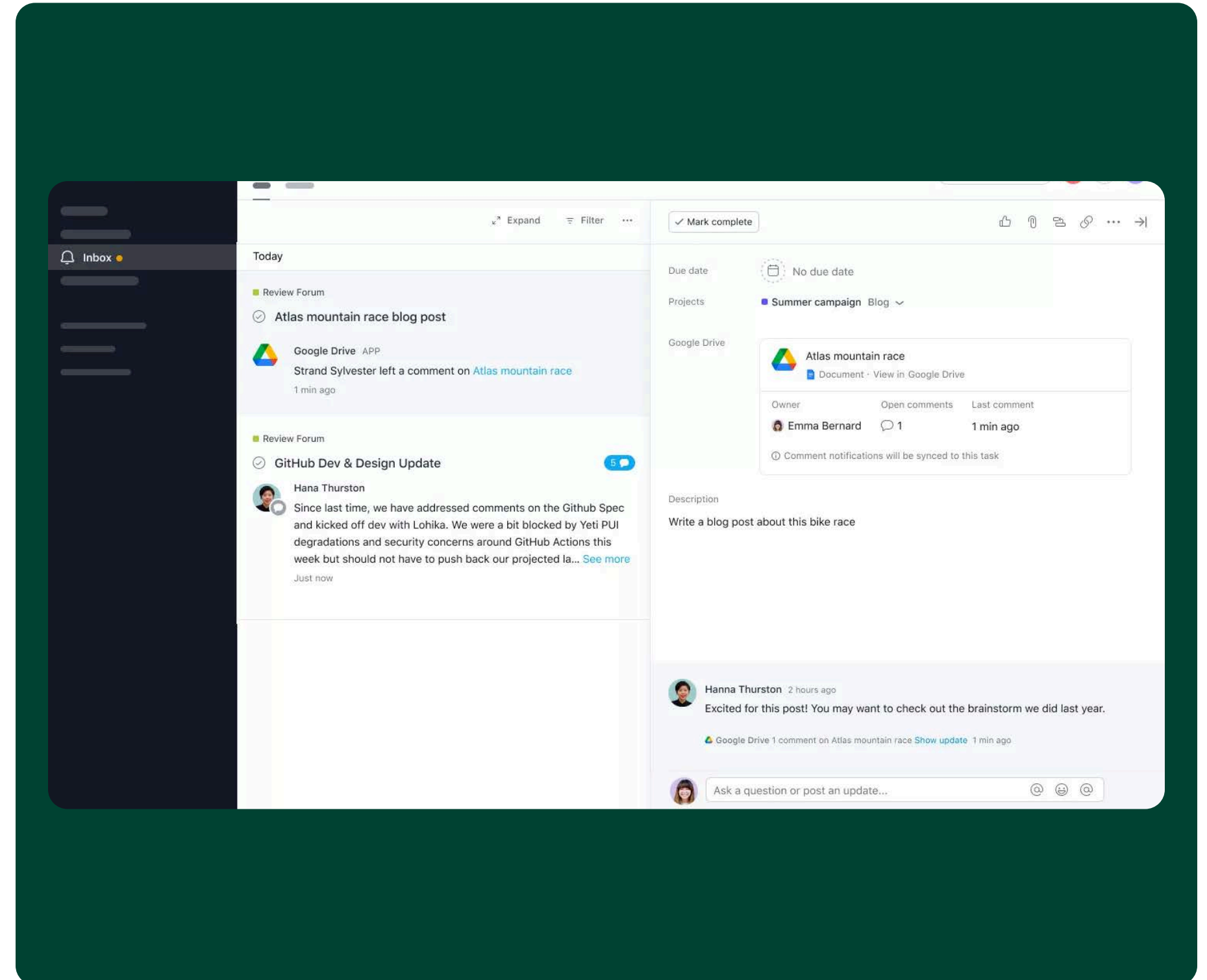
Integrations & API



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.



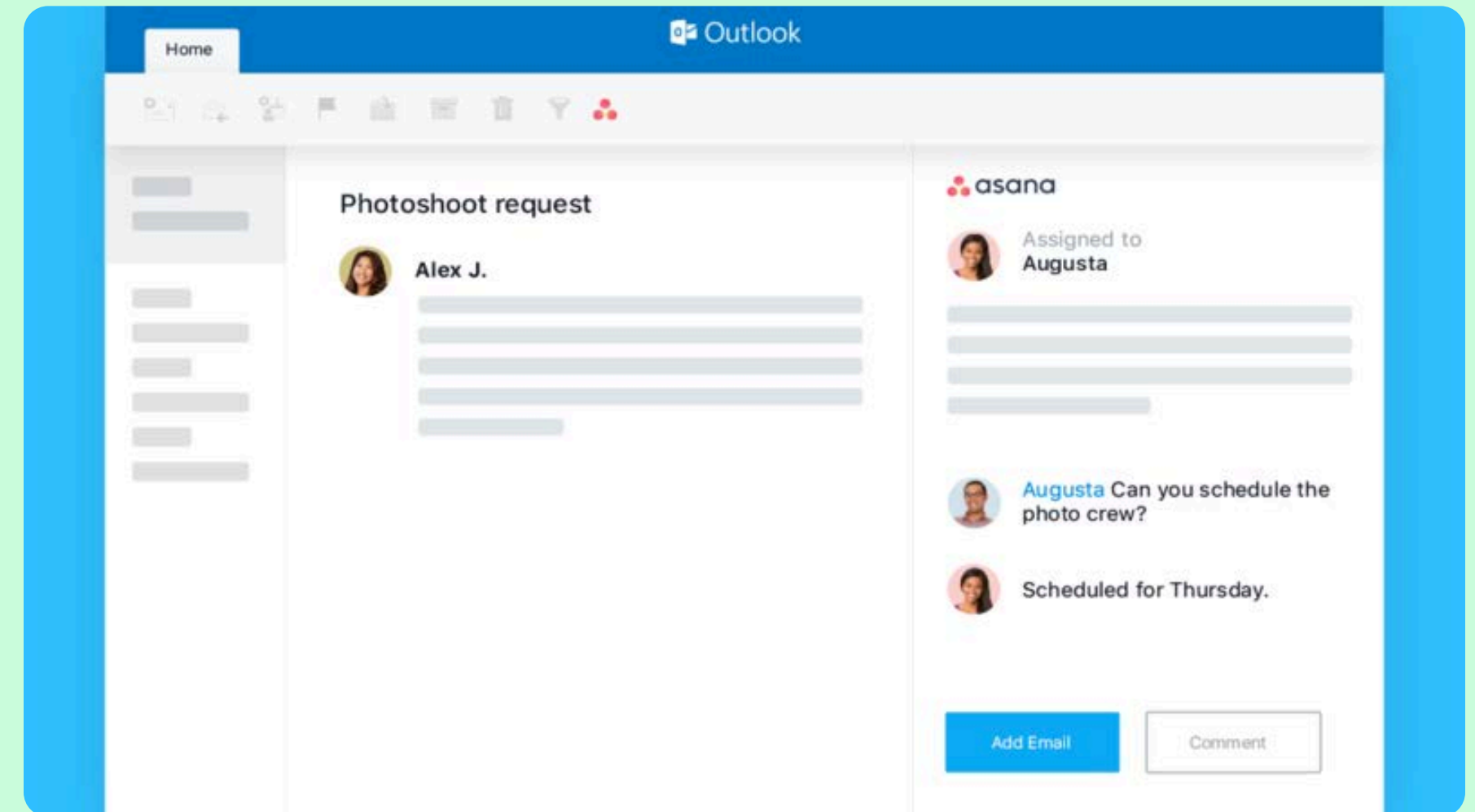
Key benefits

- 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.



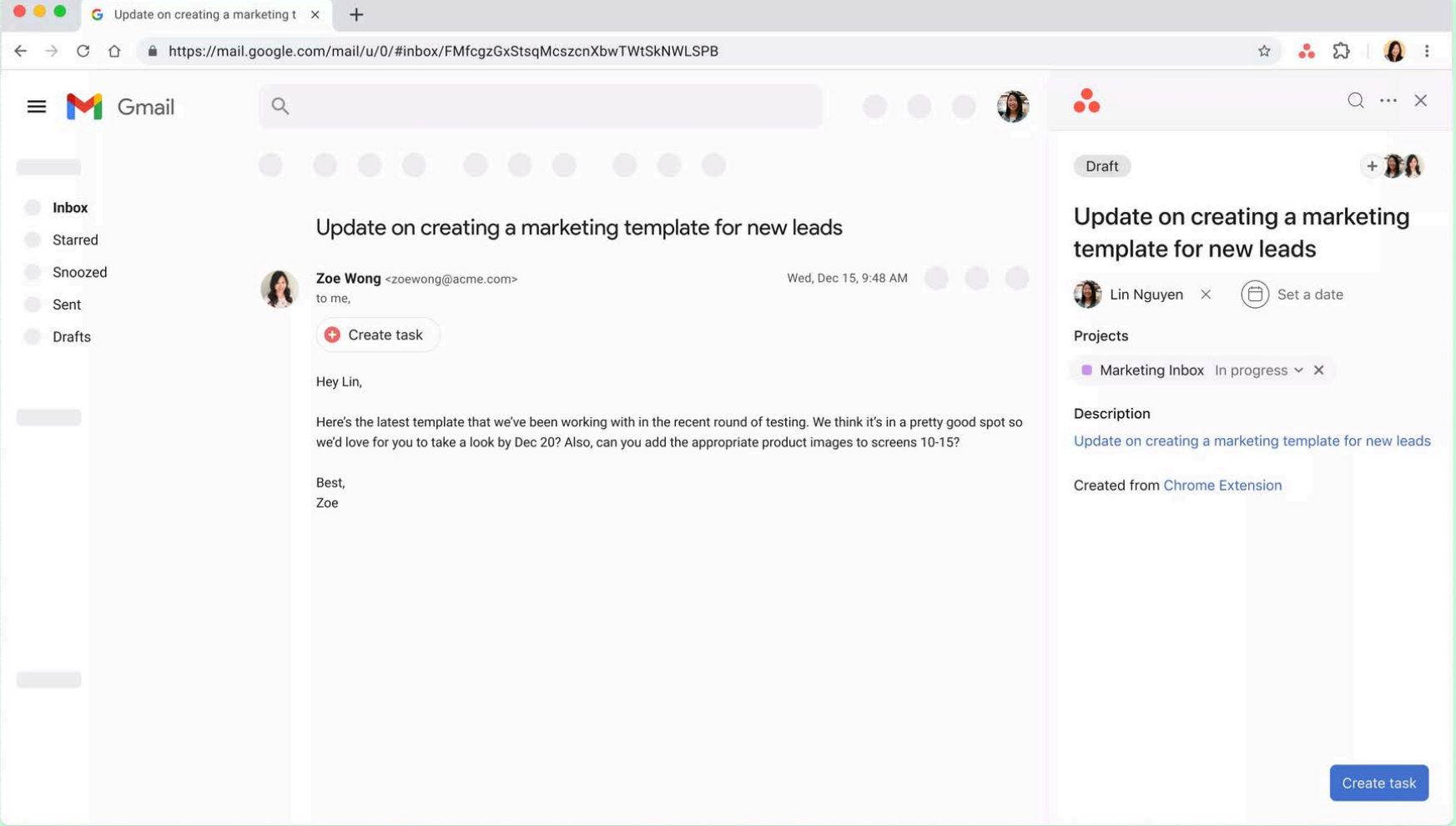
Key benefits

- 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.



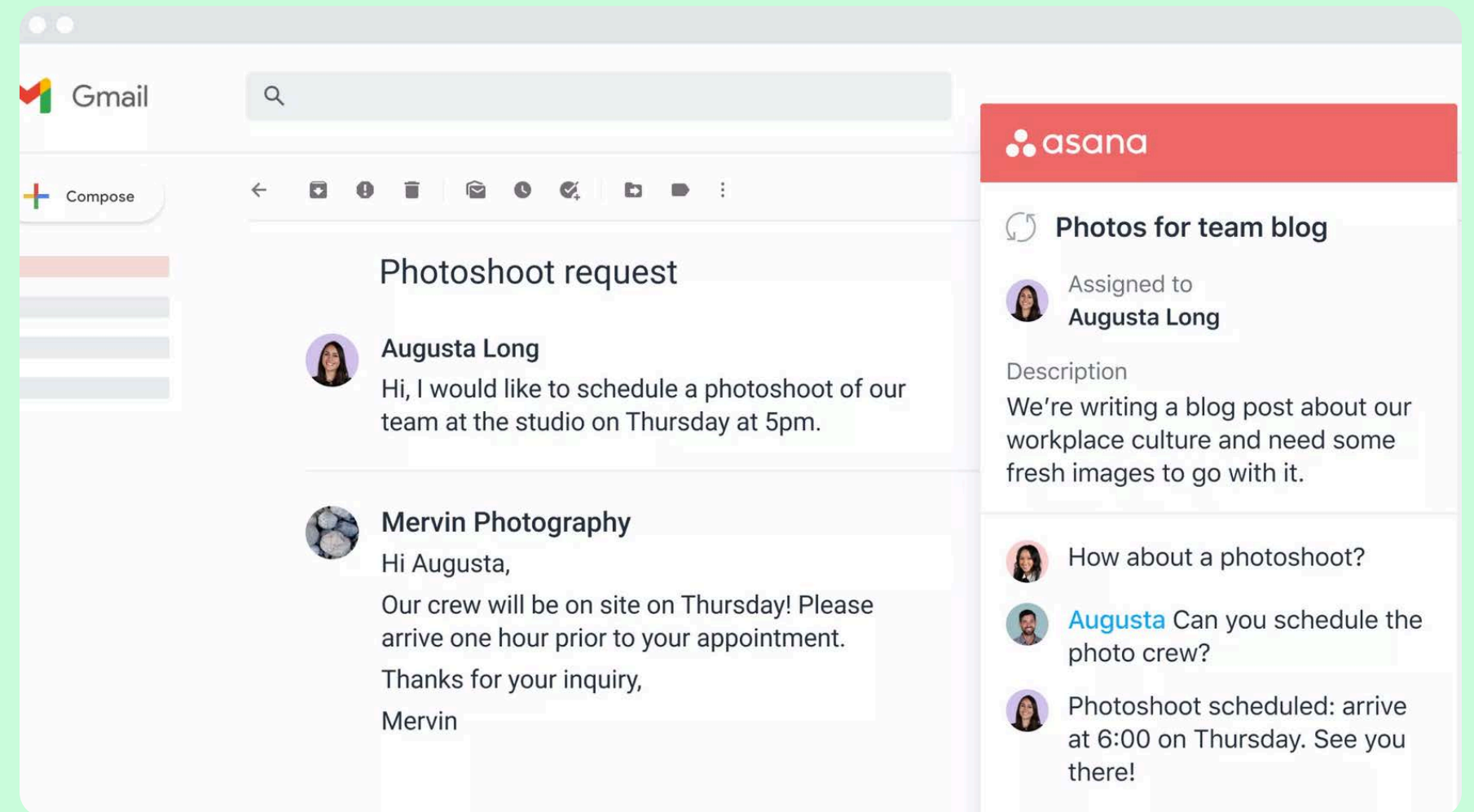
Key benefits

- 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

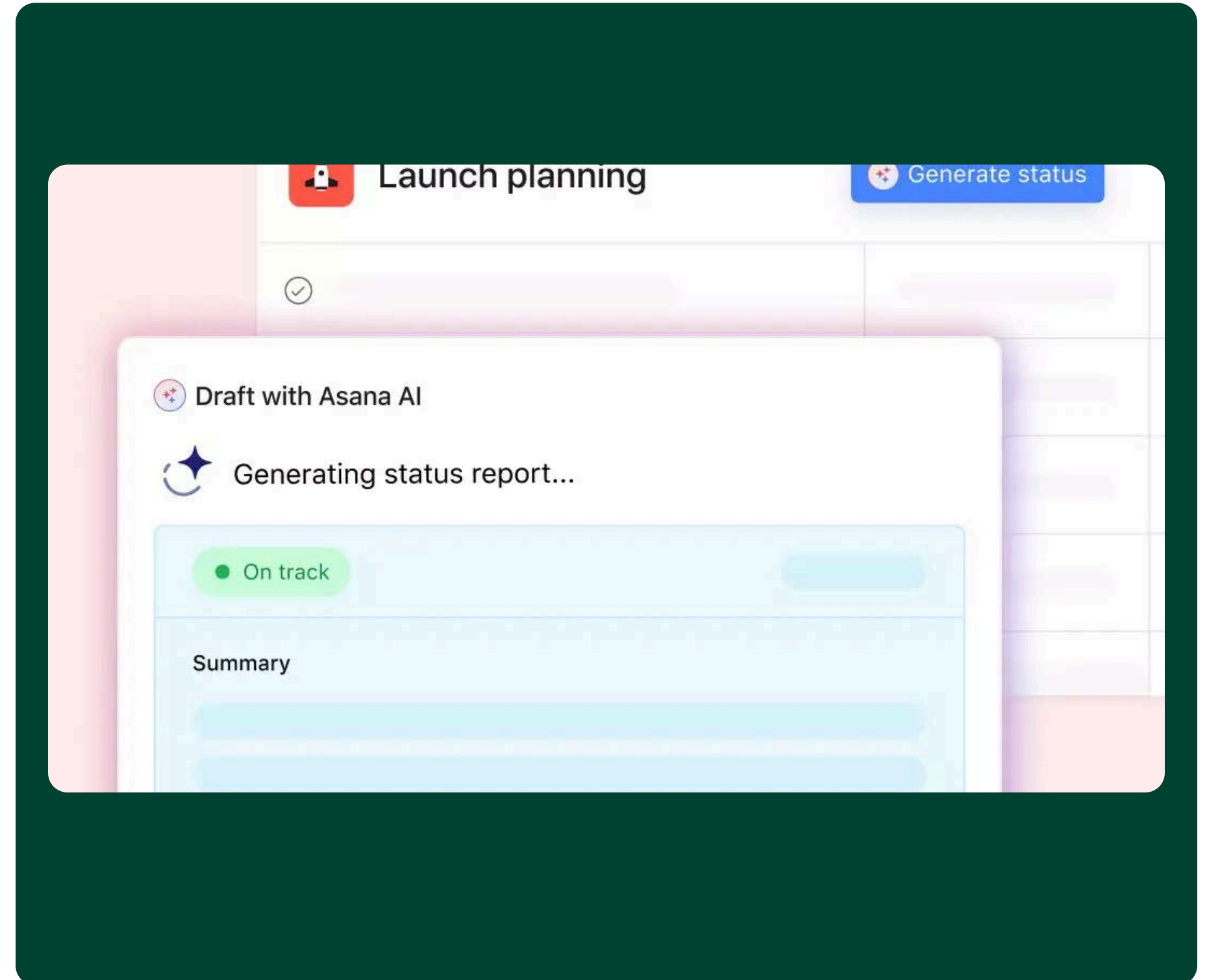
Download the extension from the Gmail add-on [marketplace](#). If you are the admin for your domain, you can install the add-on for the entire organization.

SUMMER RELEASE 2024

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



Create structured projects effortlessly with smart projects

RESOURCES →



Overview

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



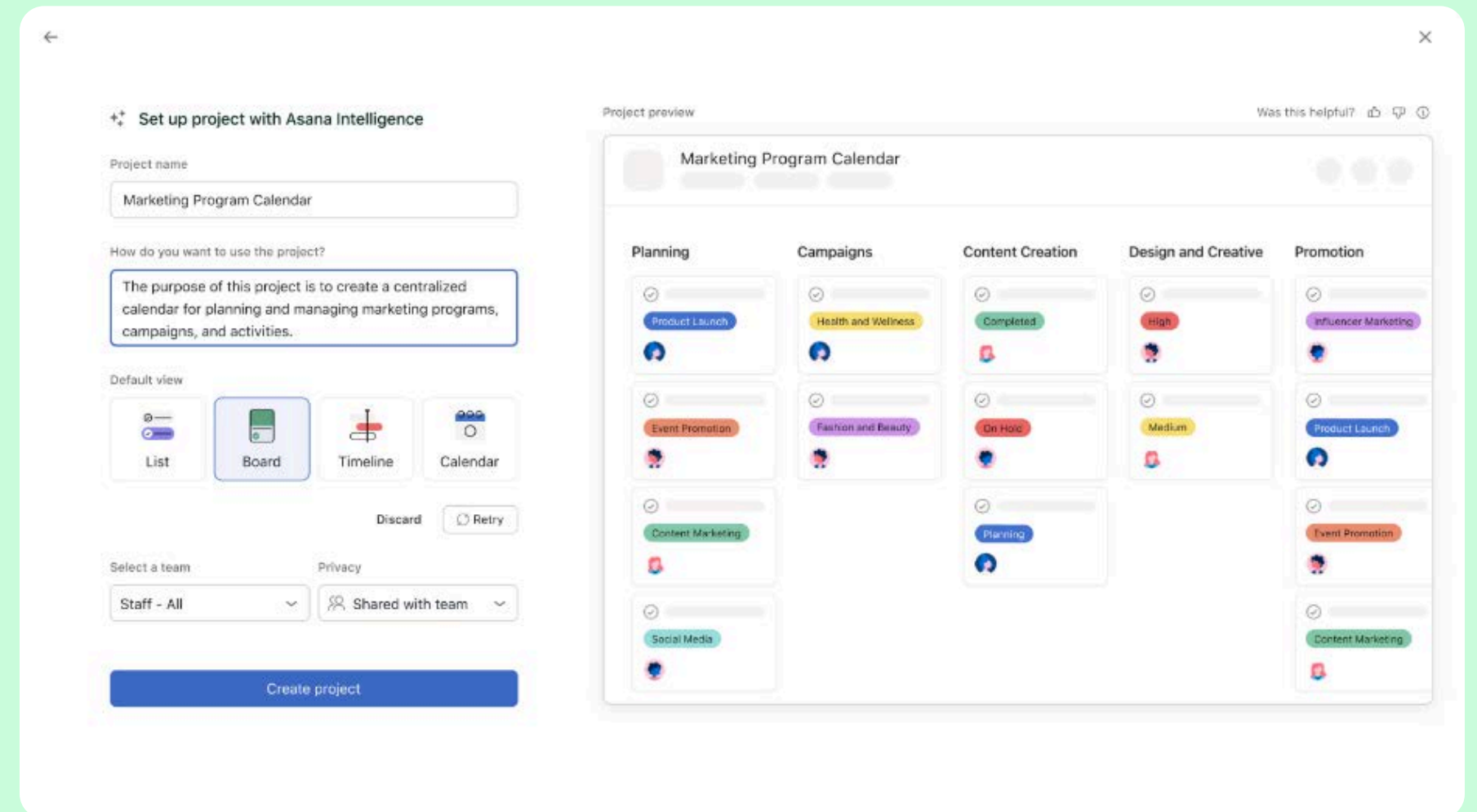
Key benefits

- 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.



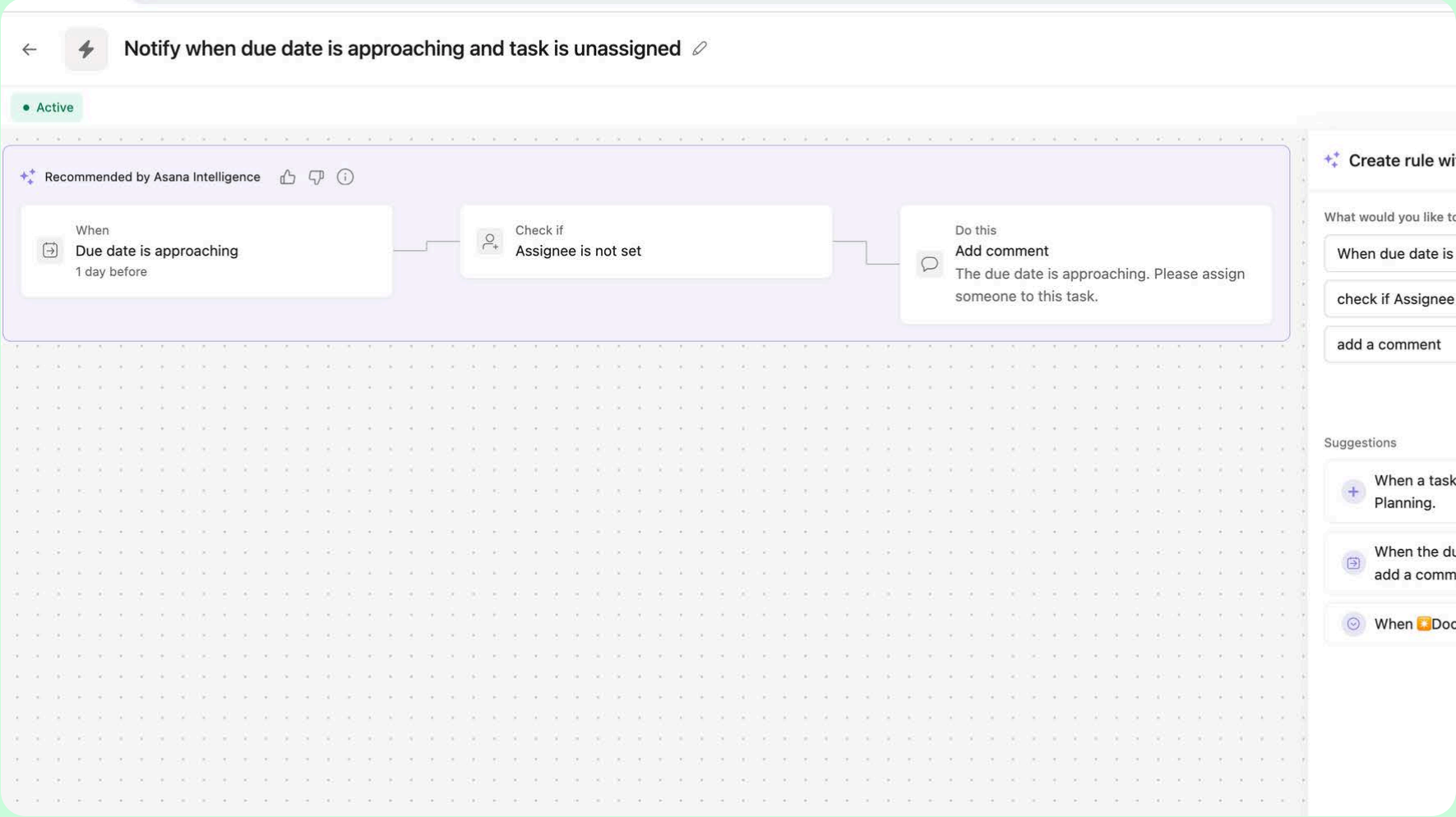
Key benefits

- 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.



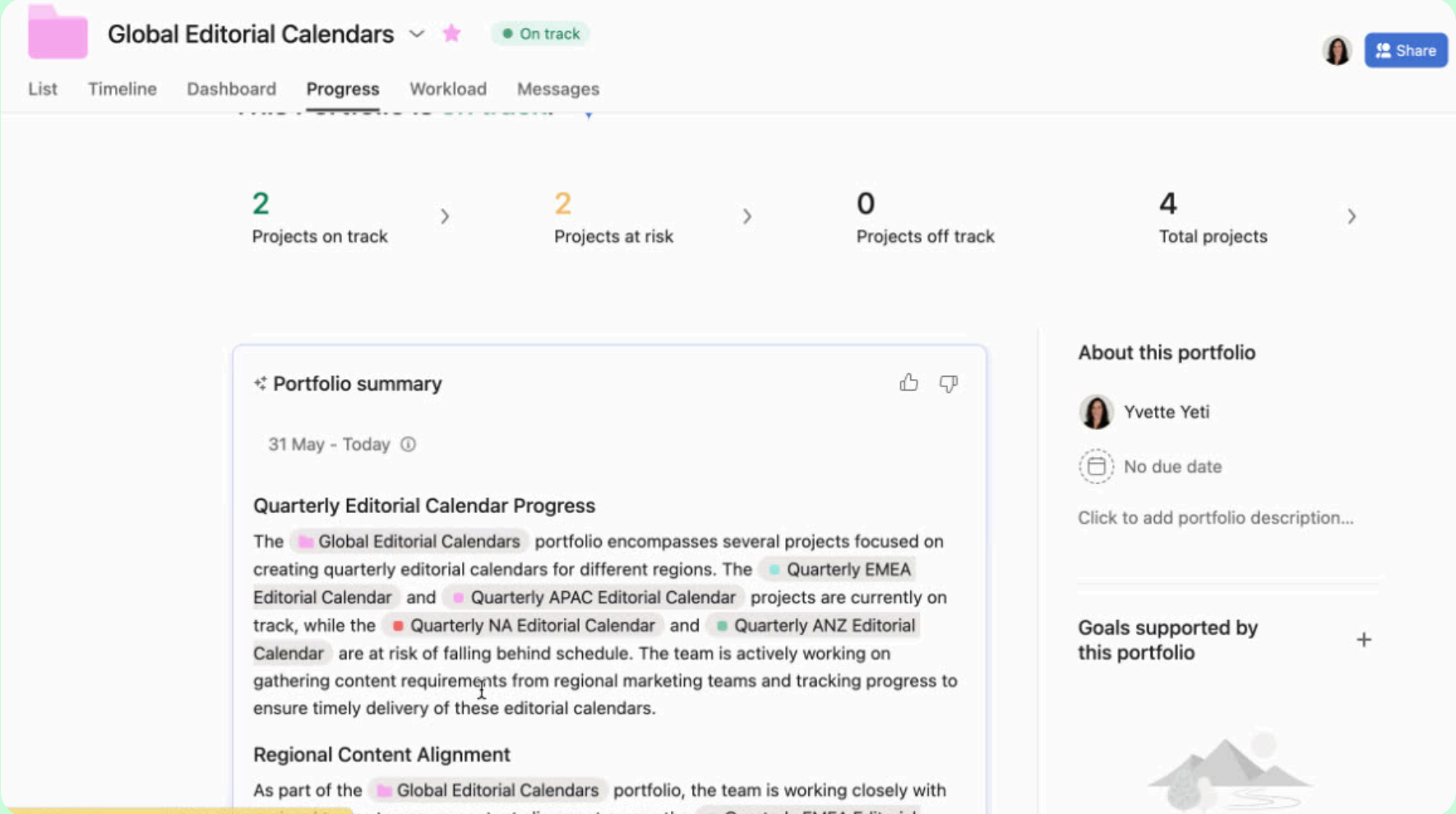
Key benefits

- 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.



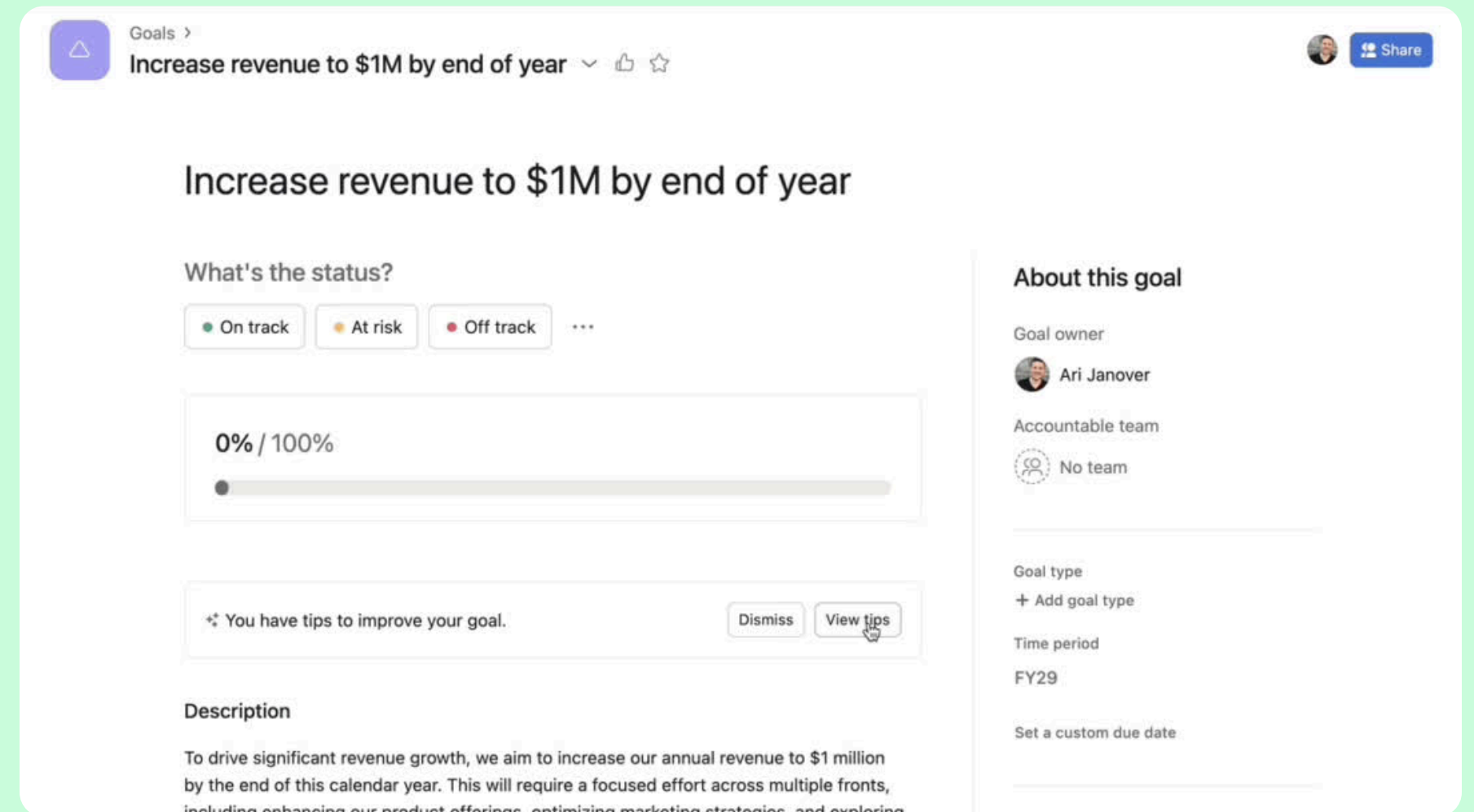
Key benefits

- 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.

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Thank you

