ASANA PROJECT MANAGEMANT TRAINING MANUAL

Date: 10/12/2022

Welcome to our Asana training guide!
Whether you're an Asana pro or a complete newcomer to the tool, this step-by-step guide will give you the confidence and skills you need to navigate and excel with Asana.

Let's start with some learning objectives. Here's what you will be able accomplish in Asana by completing this training guide.

1

System Overview & Notifications | Page 3
Learn about the hierarchy of teams, projects, tasks, & notifications and how they interconnect

2

Accessing "My Tasks" | Page 7
"My Tasks" will be your own personal accountability list, let's learn how to organize it appropriately

3

Project Creation | Page 9
Learn how to build timelines, change due dates, and assign tasks from the pre-built templates

4

Report Creation | Page 13
Learn how to use Asana's search functionality and our pre-built reports to gain insight into your projects

5

Portfolio Creation | Page 18
Learn how to create your very own portfolios so you can organize and track projects important to you

6

Editing Templates | Page 21
Templates will inevitability change as time goes on, learn how to edit them appropriately

Section Overview
In this section of the training guide, we'll cover how Asana assists with work management, the architecture of the Crown Castle Asana instance, and basic definitions for projects, tasks, reports, and portfolios. We'll also review how to setup your own notifications.

Prefer a video walkthrough?
Click here to watch our video overview of this section ⬉

Where Asana fits

Documents
Creating, sharing, storing documents and files
(*e.g. OneDrive, Dropbox, etc.*)

Work Management
Creating clear plans and tracking progress towards goals

Messaging
Sending messages, keeping teams coordinated, making announcements
(*e.g. Teams, Outlook, etc.*)

Basic Asana definitions

Teams
Teams are subsets of people in your organization who collaborate on projects with each other. Each team has its own members and projects, messages, and calendar.

Projects
Projects allow you to organize all of the tasks related to a specific initiative, goal, or big piece of work into a list or board.

Tasks
Tasks represent actionable steps or to-do's to make it clear who's responsible for what by when—but they can also represent ideas and reference items.

More Asana definitions

Portfolios

Portfolios provide a holistic view of all your important projects in one place. Any user can create their own set of portfolios to help them track projects.

Reports

Reports allow you to communicate the status of a project. Examples include summarizing past due, at risk, or completed tasks.
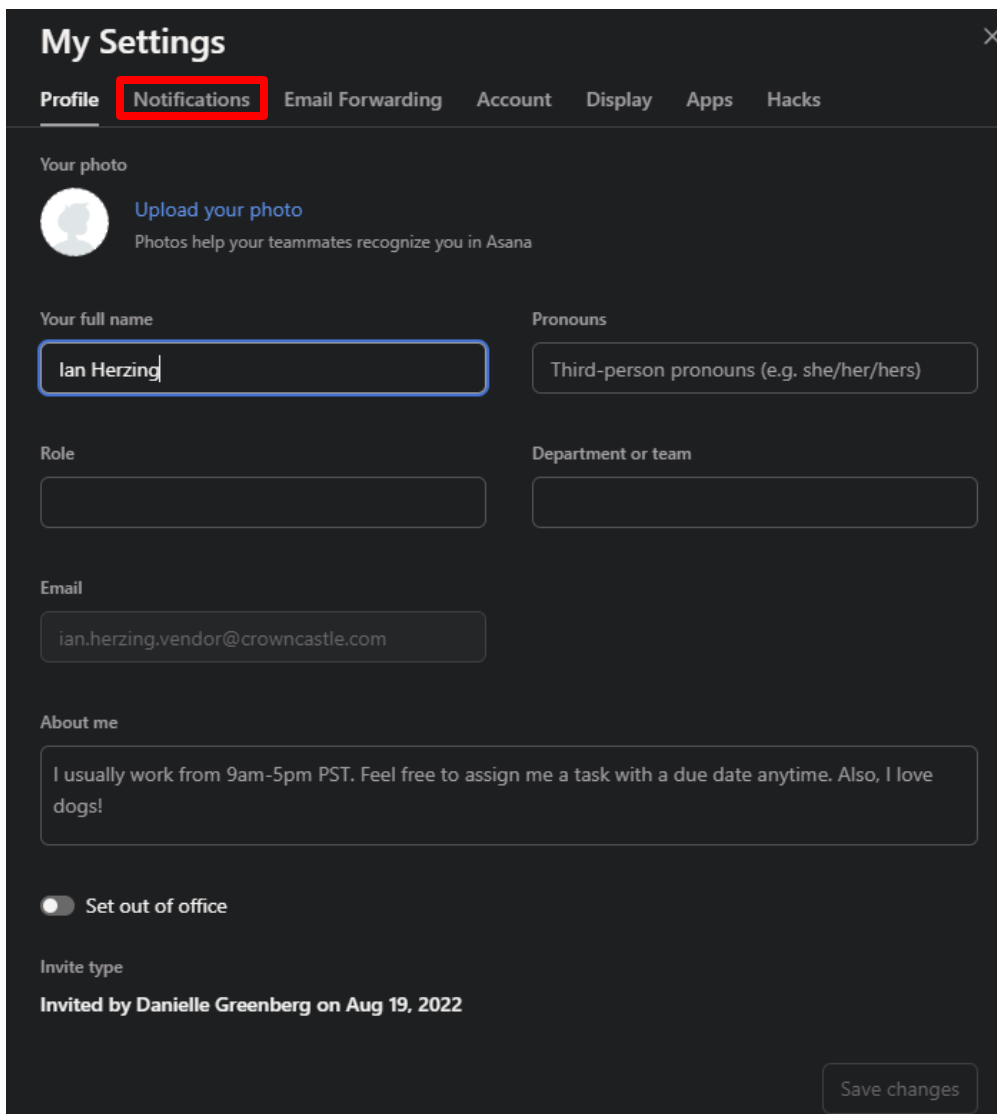
Setting up Asana notifications

The default for Asana is to send notifications about every single update that is happening in the system. This can quickly become overwhelming! It might be better for you to setup more tailored notifications that are more relevant to your work. Here's how you do it.

1   Click your profile photo in the top bar and select My Settings.
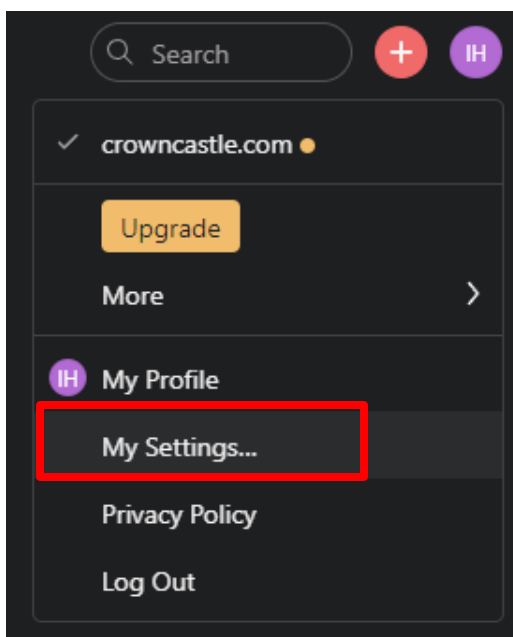
Setting up Asana notifications (*cont…*)

2   Navigate to the Notifications tab.
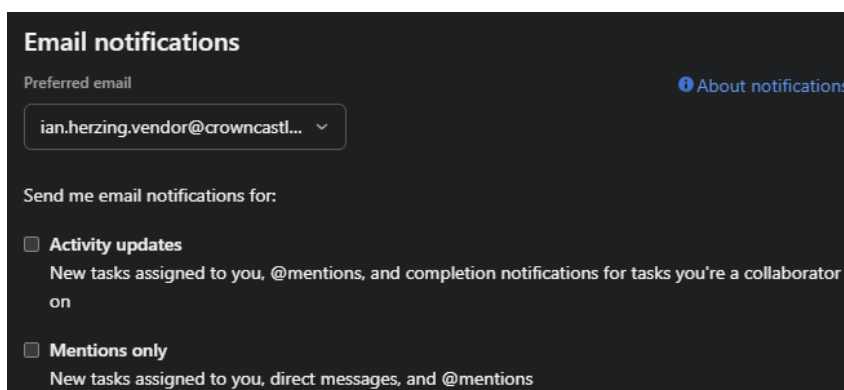
3   Check/uncheck any of the boxes to toggle your email notifications on/off.

CROWN CASTLE ASANA SYSTEM ARCHITECTURE

KEY

ORGANIZATION — Organizations connect all the employees at your company using Asana in a single space based on your company's shared email domain. Within the organization, you and your colleagues can split into teams to collaborate on your projects and tasks.

TEAMS — Teams are subsets of people in your Organization who collaborate on projects with each other. Each team has its own members and projects, messages, and calendar.

PORTFOLIOS — Portfolios provide a holistic view of all your important projects in one place. With project portfolio management you can organize your most important projects, monitor their health in real-time, and drill down for more information, while keeping your team updated on progress.

REPORTS — Reports allow you to communicate the status of a project with analytics such as summarizing past due, at risk, or completed tasks and even reports for specific project tags or custom fields.

PROJECTS — Projects allow you to organize all of the tasks related to a specific initiative, goal, or big piece of work into a list or board.

System architecture diagram columns:

- Strategy & Insights → Projects → Past Due, At Risk, etc. Reports → Strategy & Insights Portfolios
- Demand Gen → Projects → Past Due, At Risk, etc. Reports → Demand Gen Portfolios
- One Studio → Projects → Past Due, At Risk, etc. Reports → One Studio Portfolios
- Customer Experience → Projects → Past Due, At Risk, etc. Reports → Customer Experience Portfolios
- Social Media → Projects → Past Due, At Risk, etc. Reports → Social Media Portfolios
- Events → Projects → Past Due, At Risk, etc. Reports → Events Portfolios

System Portfolio

Section Overview
In this section of the training guide, we'll cover how to access your tasks in Asana. Your task list is your own personal accountability list, it will be imperative to check your task list everyday to ensure you are meeting deadlines.

Prefer a video walkthrough?
Click here to watch our video overview of this section🖱️

Prioritize daily to-do's with My Tasks

Your "My Tasks" is your personal to-do list. Start your workday by knowing exactly what you need to focus on. My Tasks lists all the tasks assigned to you in one place across all your projects.

There's no "right" or "wrong" way to organize your My Tasks, but there are a few techniques that can help you get started. Let's take a look!

1   First, locate your My Tasks section by clicking on it in the top left navigation menu.
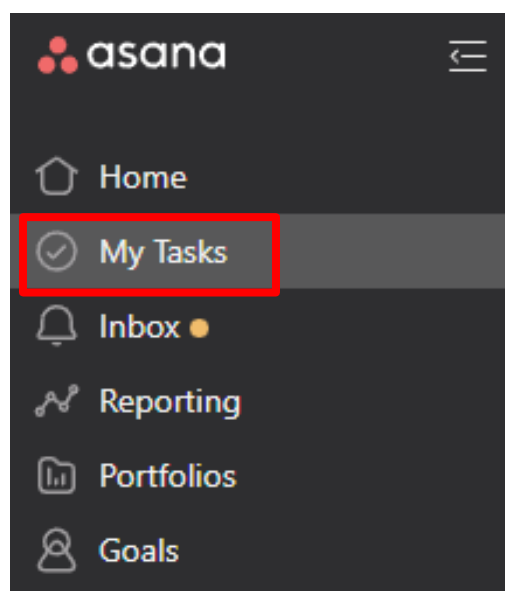
My Tasks setup (*cont…*)

2 Take control of your My Tasks by organizing the sections and tasks in a way that works for your work habits.

3 There are a number of ways to organize your My Tasks, here are two simple examples they might work for you.

Effort style

Kanban style

Section Overview
In this section of the training guide, we'll cover how you can create project timelines. Since we already have project templates setup, project creation can be simplified with the click of a button!

Prefer a video walkthrough?
Click here to watch our video overview of this section ↖

Project setup

Creating projects in Asana is simple. We'll be able to create blank projects or utilize the Crown Castle specific project templates that have tasks, due dates, and dependencies predefined.

1   First, we will want to create the project within the appropriate Asana team. Locate the team where this project will live, and click the "+" sign next to the team. Then select "Use a template."
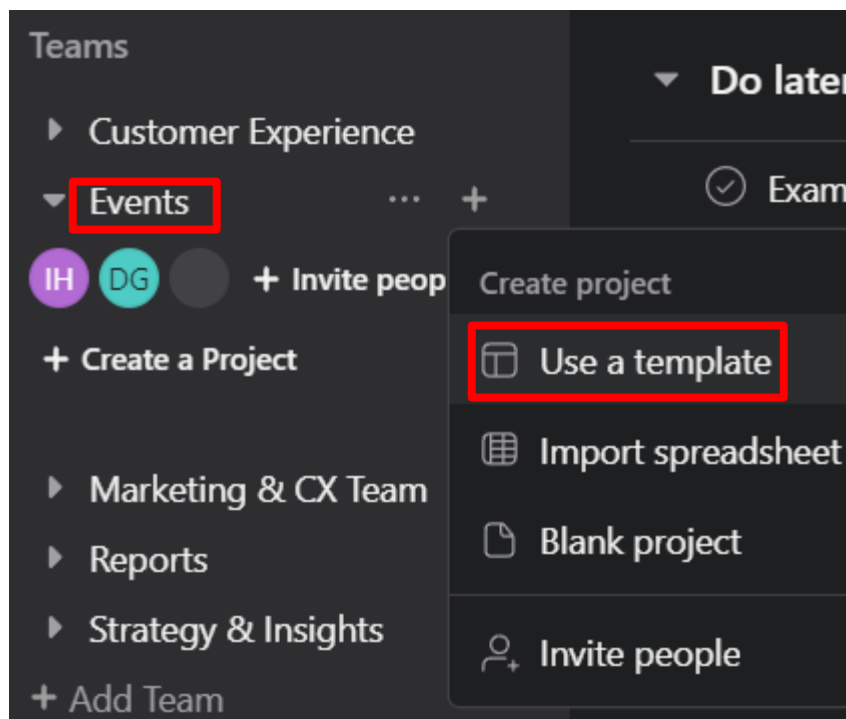
Project setup (*cont…*)

2 To locate all of the Crown Castle templates, change the "Custom" drop down you see on the left hand screen to "All types."
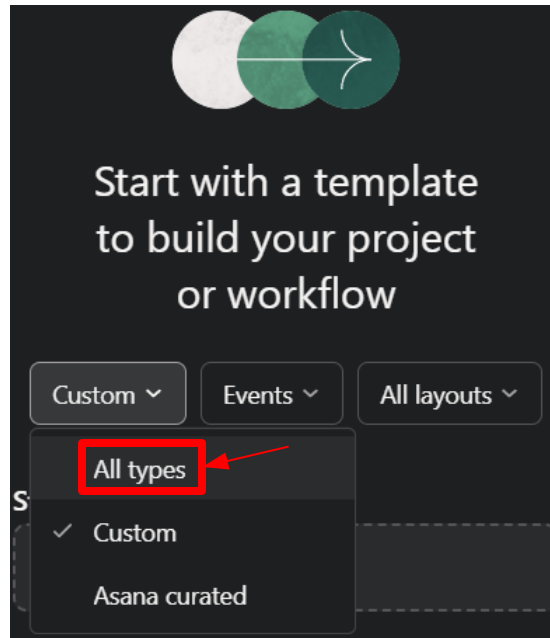
3 Next, you'll see all the custom templates under the "crowncastle.com" section. Select the template you would like to use.
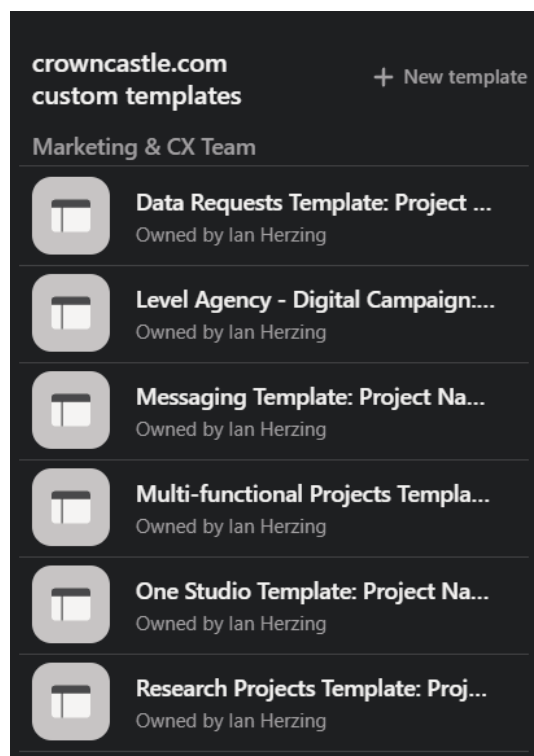
Project setup (*cont...*)

4 Now select "Use template."
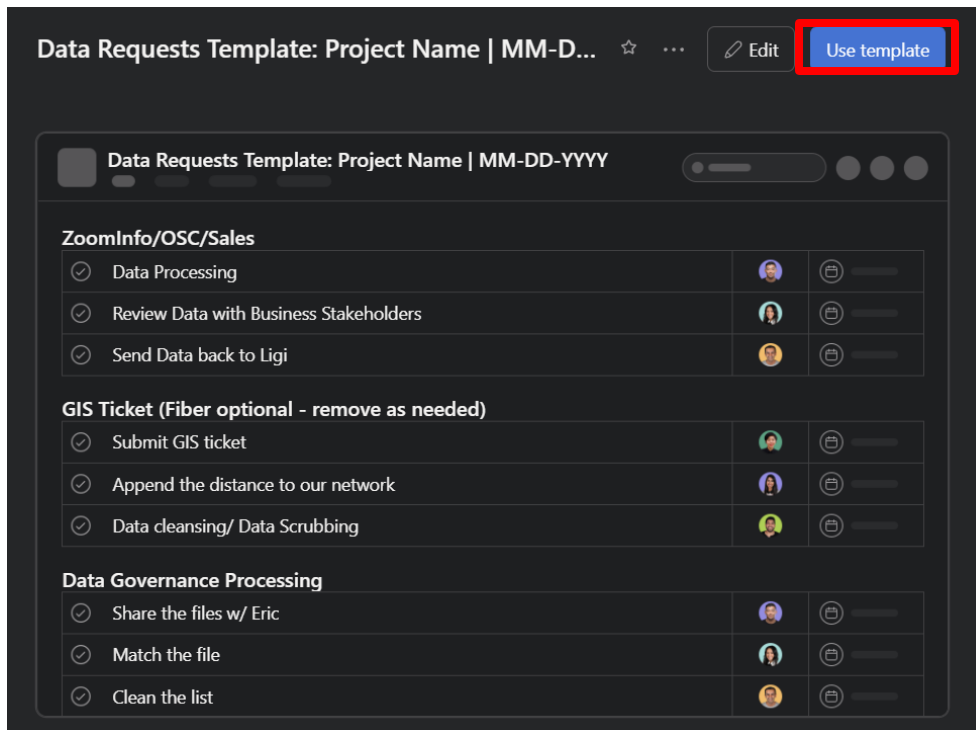
5 There are a few more important options to edit. Give your project an appropriate name. Double check the project will be placed in the appropriate team. Select the privacy level. And finally, select the project start date and click "Create project."
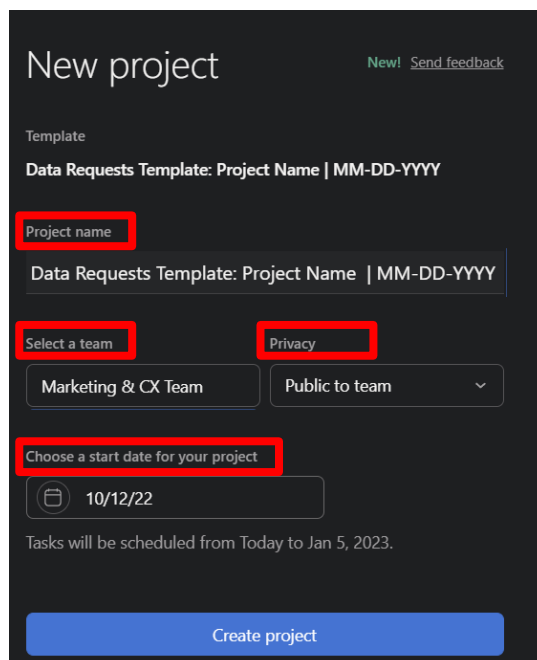
Project setup (*cont…*)

6 Project creation is almost complete. Go through and assign out the tasks by using the "Owner" column as a guide. Finally, double check the due dates to be sure the predetermined project timeline matches your deliverable dates.

Task name	Assignee	Owner	Due date
▼ ZoomInfo/OSC/Sales			
⊘ Data Processing		Ligi Joseph	Friday
⊘ Review Data with Business Stakeholders		Ligi Joseph	Monday
⊘ Send Data back to Ligi		Lisandra Fernand...	Tuesday
⊠ Cleaning the data		Ligi Joseph	Oct 25
⊠ Phase-Gate: ZoomInfo/OSC/Sales		Phase Owner	Oct 26

7 As a last step, ensure that the project is shared with the appropriate stakeholders by clicking the share button up at the top and inviting stakeholders who are not already on the member list.

IH eh ab 6   👥 Share
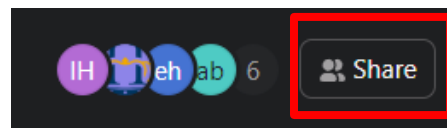
Share test   ✕

Share   Members

Invite with email

Add project members by name or email…

IH LF   Ian Herzing and 5 others   View all members

Invite with link

https://app.asana.com/share/crowncastle/test/204961971384...   🔗 Copy link

People with crowncastle.com emails can join this project with a link. If you no longer need this link, deactivate it.

👥 Public to Marketing & CX Team   Make private

Section Overview
In this section of the training guide, we'll cover how you can create reports. There are more than a few ways to look at reporting in Asana. Plus, we even have some preconfigured reports for you to review.

Prefer a video walkthrough?
Click here to watch our video overview of this section ⬉

Report setup

Reporting in Asana can help you understand the progress of your projects with a quick glance. Asana has their own reporting feature, and there are some custom ways to setup reports. Let's dive in!

1 First, we'll explore Asana's preconfigured reporting. Select "Reporting" in the top left navigation menu.
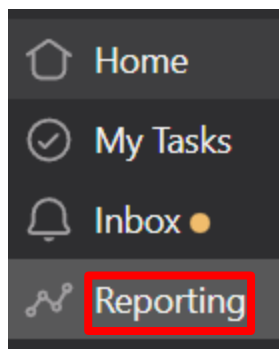
2 Next, click "Add dashboard."
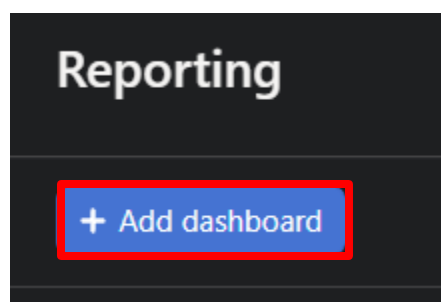
Report setup (*cont...*)

3 There are preconfigured reports you can choose from in this menu. You also can pick a custom chart which will let you pinpoint where you want to pull data from, and how you want to display it.
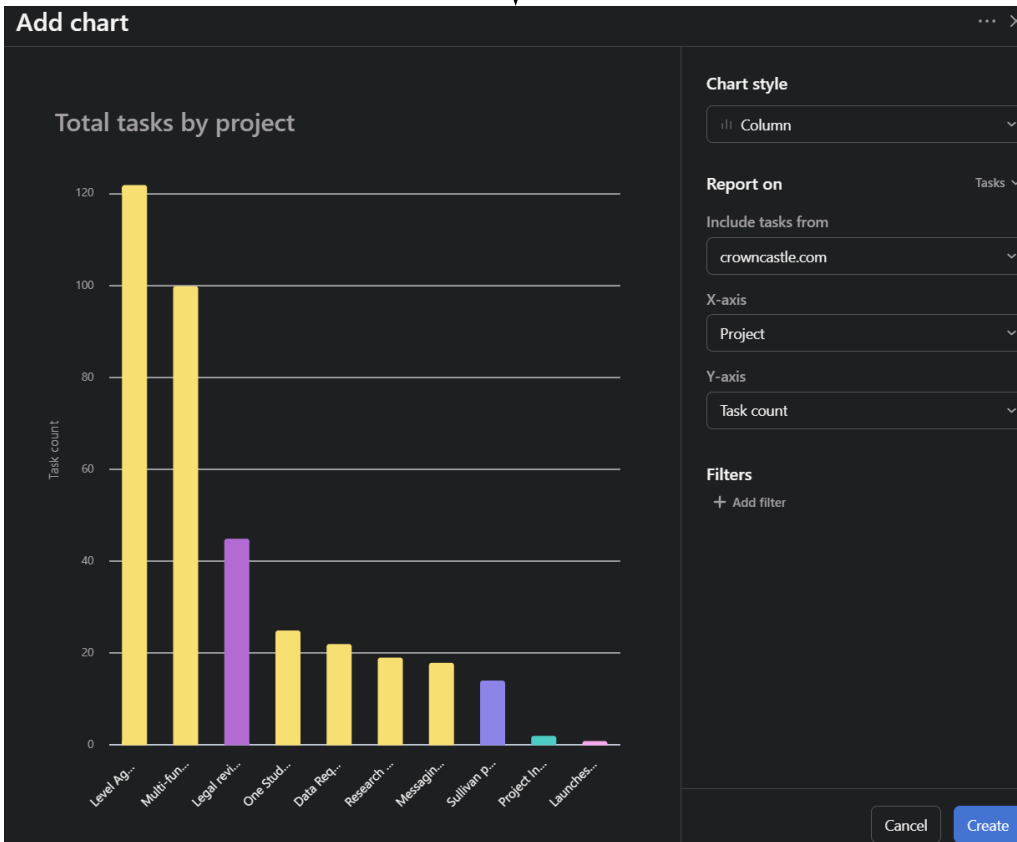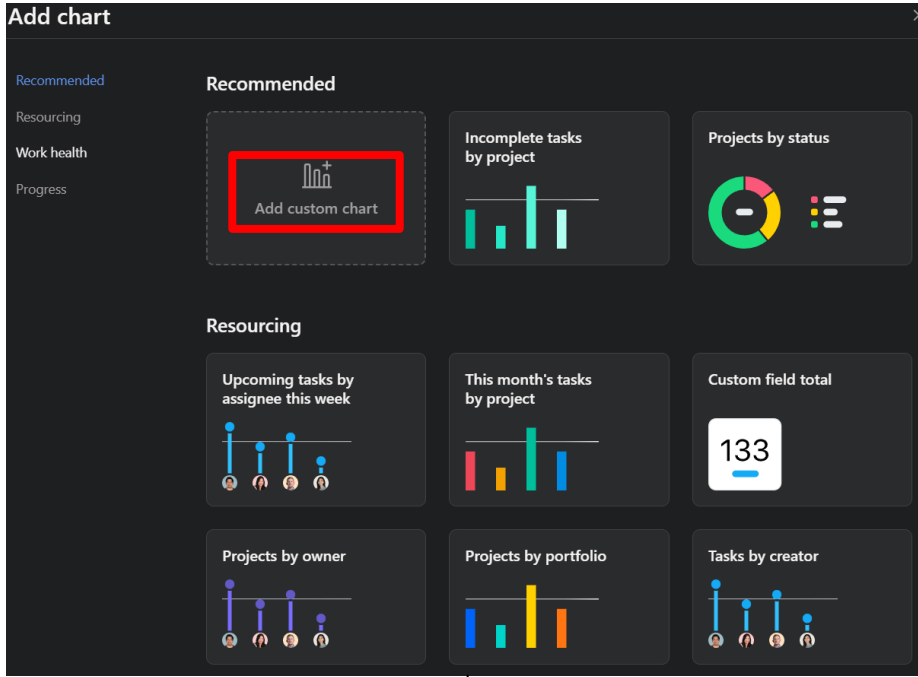
Report setup (*cont…*)

4 Besides Asana's preconfigured reports, there are also custom reports in the Crown Castle "Reports" team. These specific reports are automatically setup to report on key information across the Crown Castle Asana environment.

The "**At Risk**" report summarizes all at risk tasks.
The "**Past Due**" report summarizes all past due tasks.
The "**Launches**" report summarizes any upcoming marketing launches.
The "**Upcoming Tasks**" report summarizes upcoming tasks for the next 2 weeks.
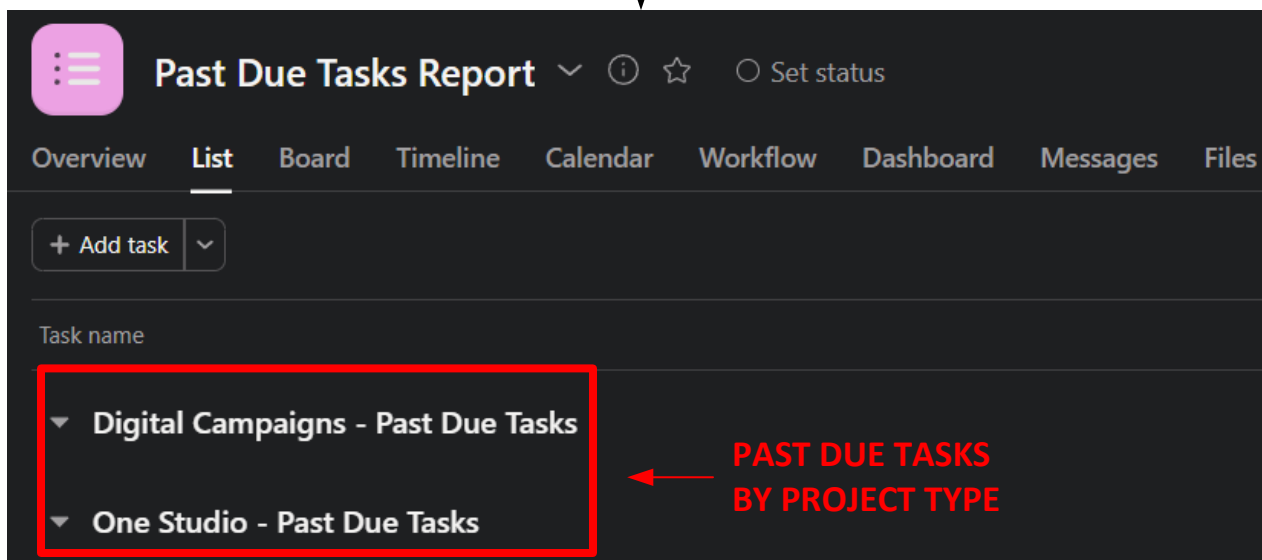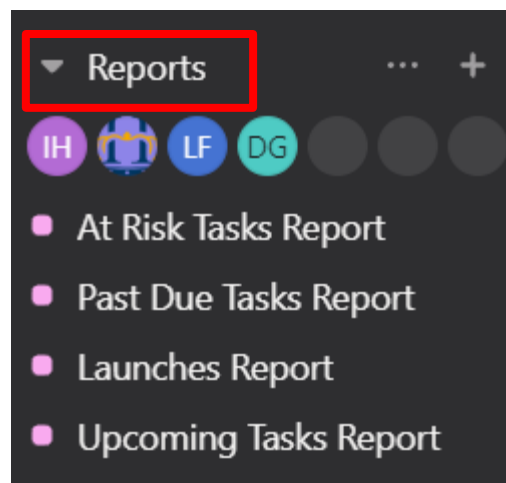
Report setup (*cont…*)

5 Finally, you can also save reports via the "Advanced search" option. Navigate to the top right of Asana, click in "Search", and select "Advanced search."
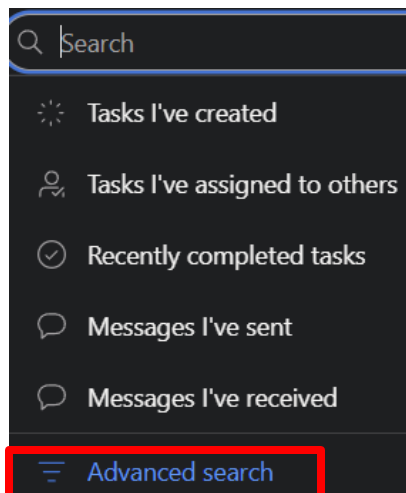
6 Now you can select a variety of options to narrow down your search. For example, you might search for "Incomplete" tasks within the last 2 weeks for a single project.

Report setup (*cont…*)

7   If you want to refer back to your advanced search parameters again, you can select "Save search."
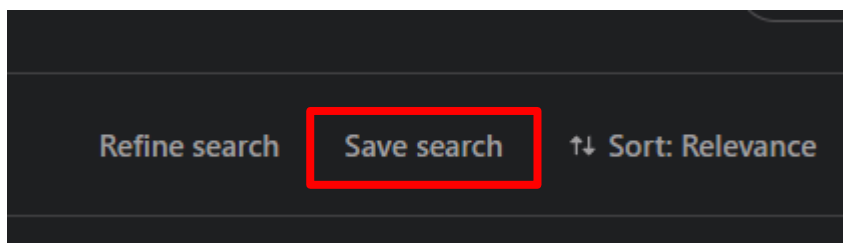
8   Your newly saved search will populate in your lefthand navigation menu under "Saved searches."
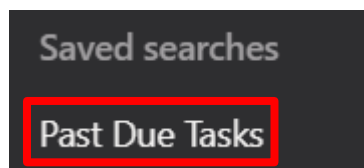
Section Overview
In this section of the training guide, we'll cover how you can create portfolios. Portfolios are customized way you can organize your projects. We also have some preconfigured portfolios for you to review.

Prefer a video walkthrough?
Click here to watch our video overview of this section ➤

Portfolio setup

Portfolios in Asana can help you understand the progress of your projects at a high-level. Anyone can create portfolios, giving you freedom into how you want organize the different initiatives you oversee. Let's dive in!

1 First, navigate to the top left menu and select "Portfolios."
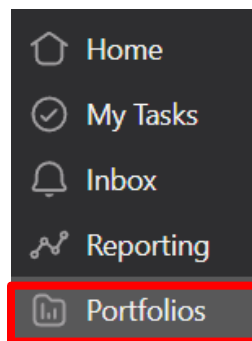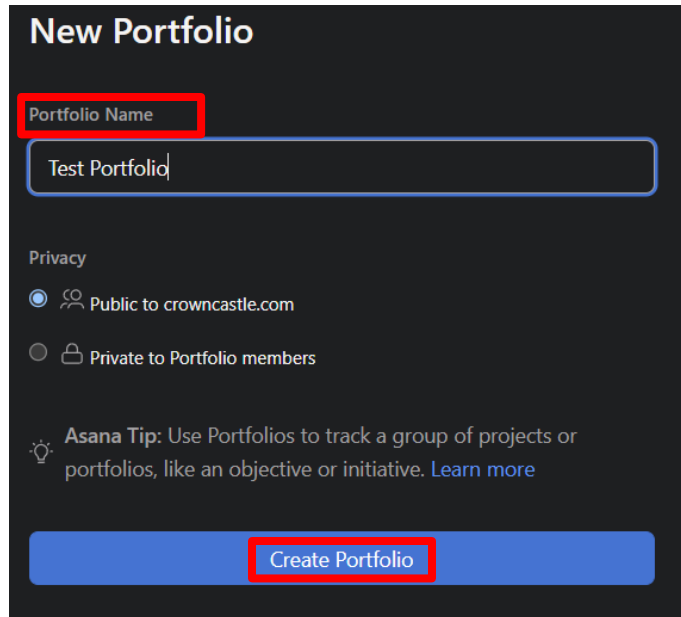
2 Now select "New Portfolio."
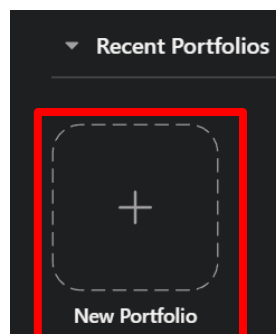
Portfolio setup (*cont...*)
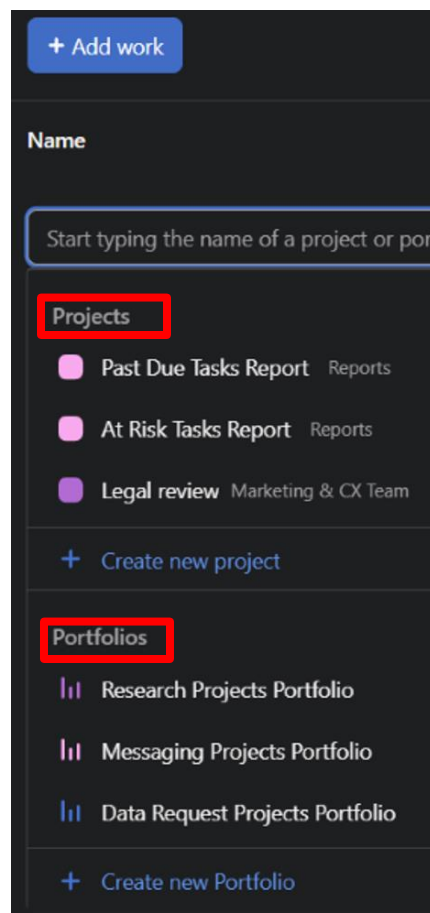
3 Next, give your portfolio a name, select the privacy level, and click "Create Portfolio."

New Portfolio

Portfolio Name

Test Portfolio

Privacy

● 👥 Public to crowncastle.com

○ 🔒 Private to Portfolio members

💡 **Asana Tip:** Use Portfolios to track a group of projects or portfolios, like an objective or initiative. Learn more

Create Portfolio

4 Now, you can start adding projects or even nest portfolios within portfolios. Add your desired information.

+ Add work

Name

Start typing the name of a project or port

Projects

🟣 Past Due Tasks Report   Reports

🟣 At Risk Tasks Report   Reports

🟣 Legal review Marketing & CX Team

+ Create new project

Portfolios

📊 Research Projects Portfolio

📊 Messaging Projects Portfolio

📊 Data Request Projects Portfolio

+ Create new Portfolio

Portfolio setup (*cont...*)

5 Once you have added some projects, you can monitor task progress and priority of a group of projects. You can even add custom fields to make your portfolios more robust.
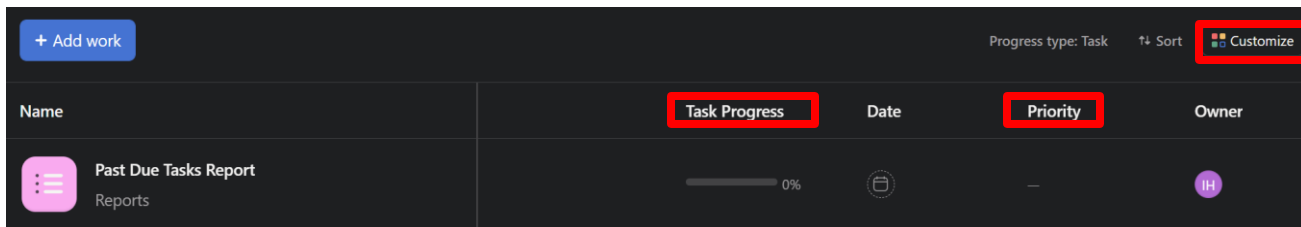
6 Navigate back to the "Portfolios" main menu to check out some of the preconfigured portfolios. Projects automatically route to these portfolios upon creation. The "Live Projects Portfolio" will showcase all current projects in the Crown Castle Asana environment.
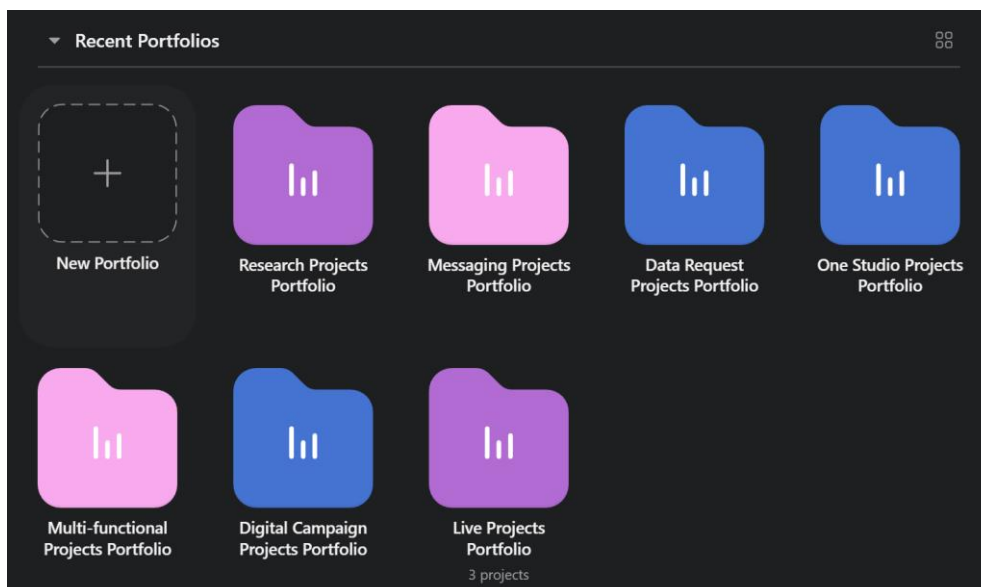
Section Overview
In this section of the training guide, we'll cover how you can edit project templates. The current project templates are preconfigured, but as time goes on, they will need updated with new information.

Prefer a video walkthrough?
Click here to watch our video overview of this section

Editing templates

As mentioned in a previous section of this guide, project templates are used to quickly spin up projects with predefined tasks and durations. Templates will likely go through changes, however, so let's explore how to update them.
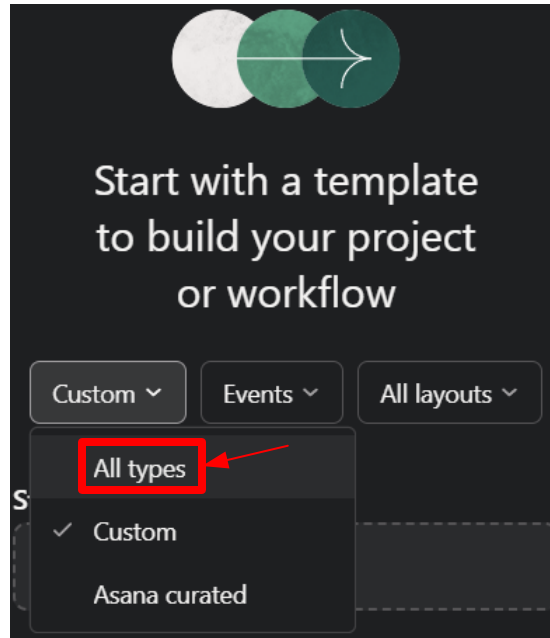
1 First, navigate to an Asana team and select "Use a template" from the "+" on the menu.
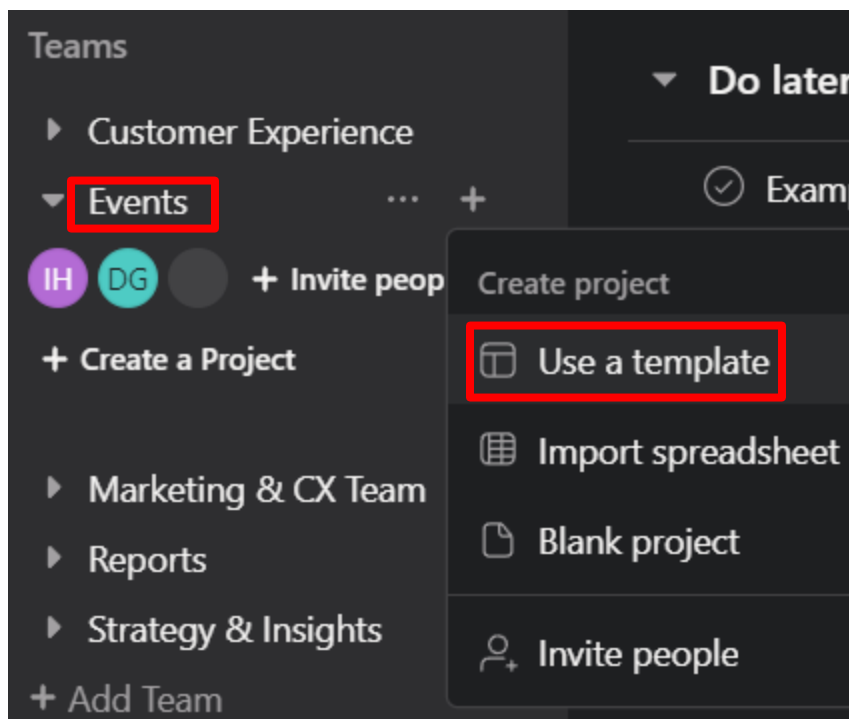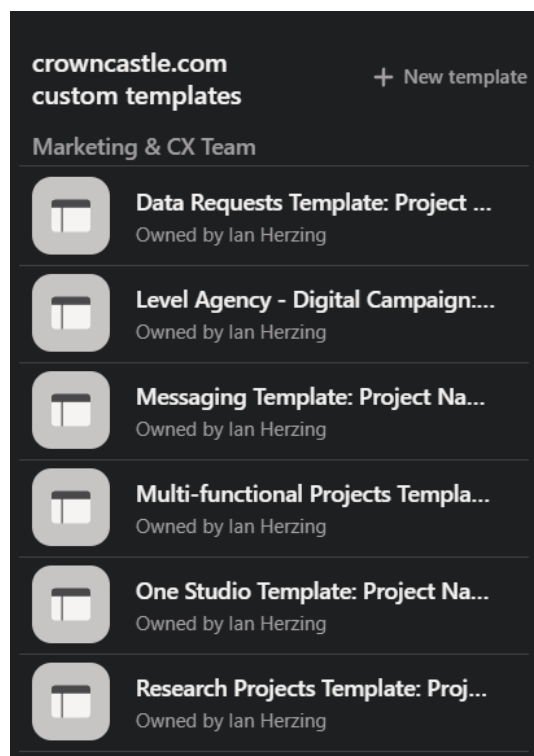
Editing templates (*cont...*)

2 To locate all of the Crown Castle templates, change the "Custom" drop down you see on the left hand screen to "All types"
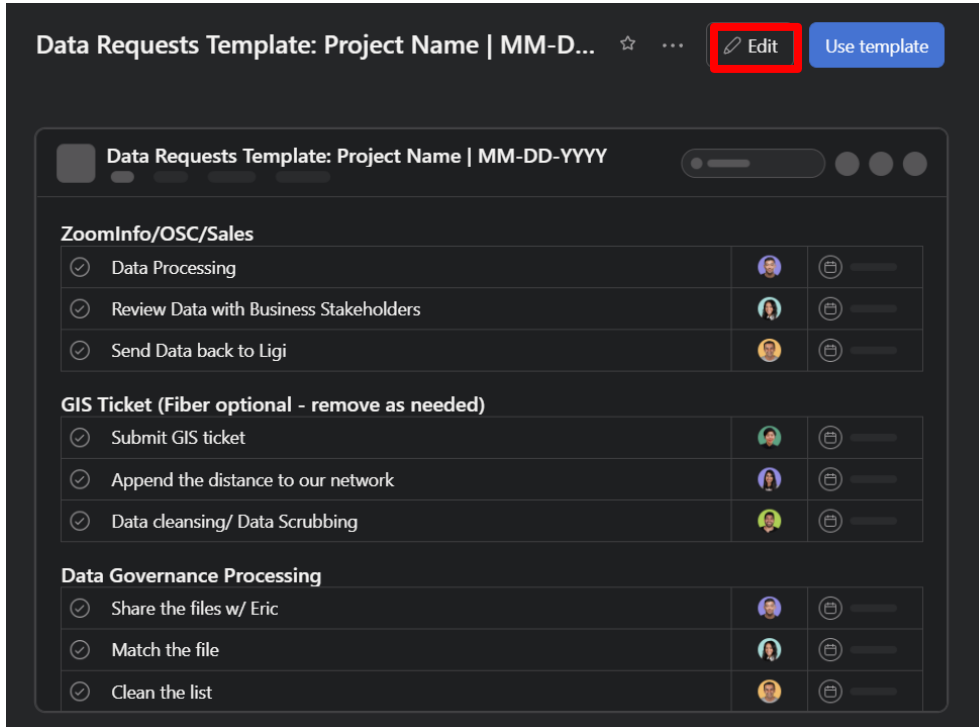
3 Next, you'll see all the custom templates under the "crowncastle.com" section. Select the template you would like to edit.
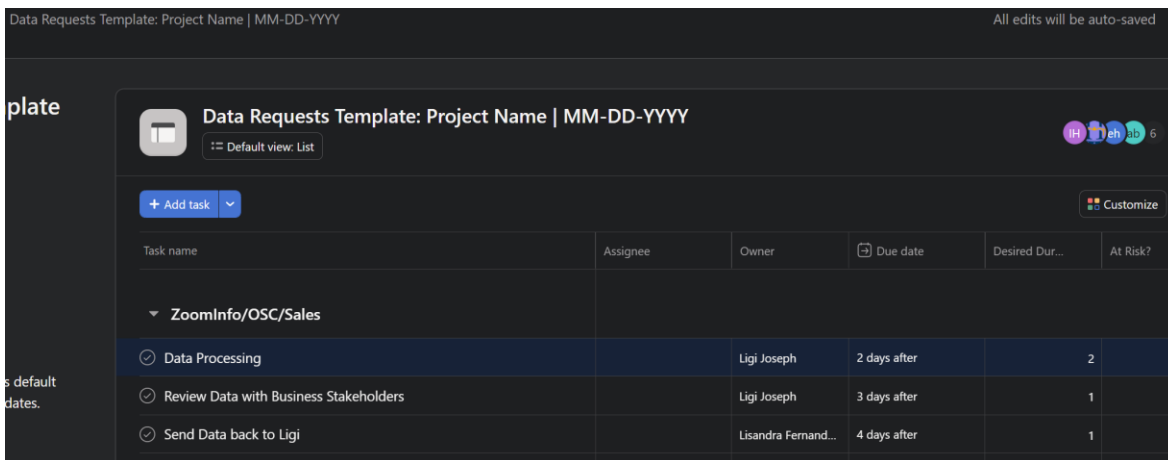
Editing templates (*cont...*)
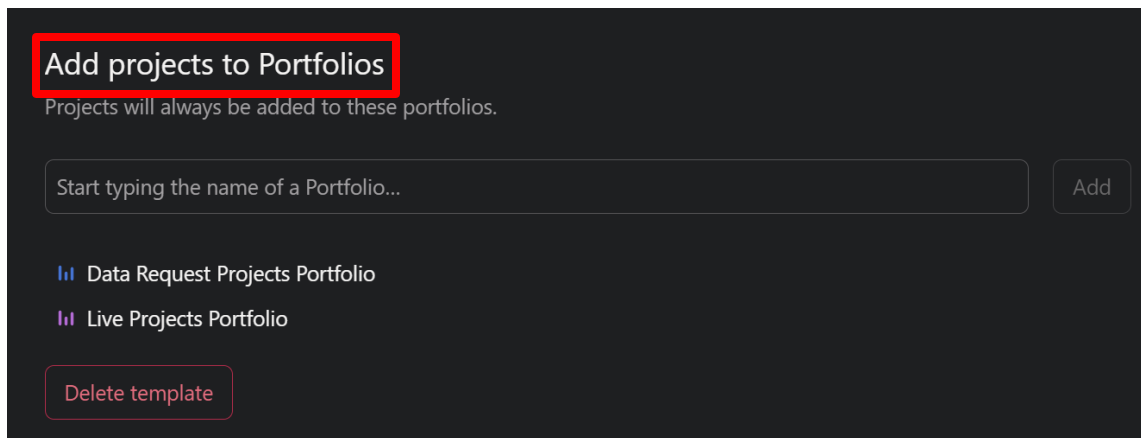
4   Select "Edit" from the top menu.

5   Now you can edit task information within the template. Click into tasks to edit descriptions and select "Customize" to edit or add any automations.

Editing templates (*cont…*)

6   You can also change how the template is routed to different portfolios.

7   When complete, click "Done" up at the top right of your screen.

CONGRATULATIONS! YOU HAVE COMPLETED OUR ASANA TRAINING GUIDE.