asana SOLUTIONS PARTNER

🔎 October latest Asana updates by iDO

October brings new Asana tools to scale your project management.

From keeping your key projects organized (portfolio rules and templates dashboard) to improving insights (Stacked bar reports and Capacity Planning), these updates are all about helping your team work smarter, not harder.

1- Portfolio & Projects Management



Portfolio Rules

Helps organize and share complex portfolios by automating actions to keep stakeholders informed.

💙 ***iDO Tips*:** Use portfolio rules to automatically notify relevant team members about major updates. It's a great way to keep everyone aligned effortlessly!

Plans: *Available from Advanced plan and also from Business Legacy*

Triggers	Conditions	Actions
Work is added to this portfolio	Status is	Move or add to a portfolio
Work is removed from this portfolio	Due date is	Get status reminder
Status is changed	Owner is	Add or remove members
Custom field is changed	Start date is	Remove work from this portfolio
Due date is changed	Custom field is	Change owner to
Due date is approaching		Change due date to
Work is overdue		Set name to
Owner is changed		Change custom field to

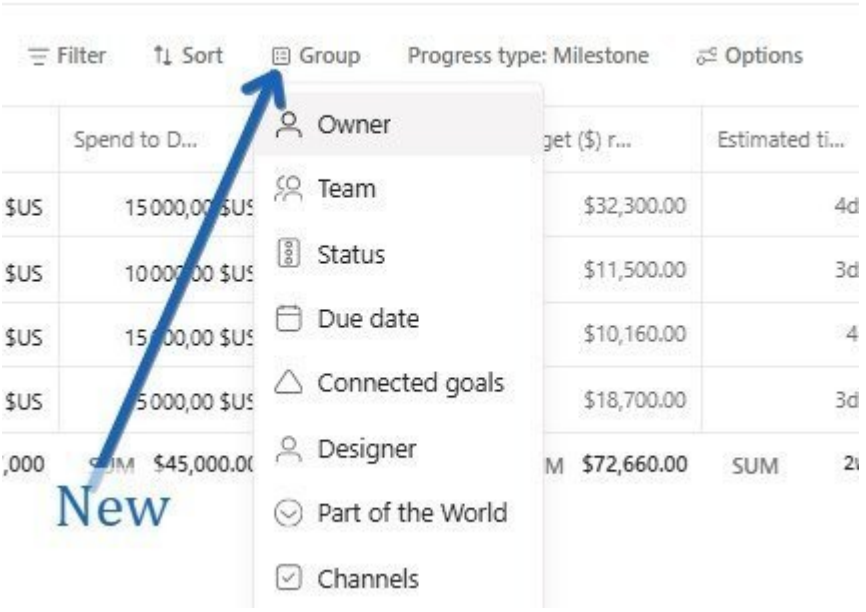
More info



Portfolio "Groups by"

"Group-by" is super useful to leverage the Custom Fields in one click.

Plans: *Available from Advanced plan and also from Business Legacy*



More info

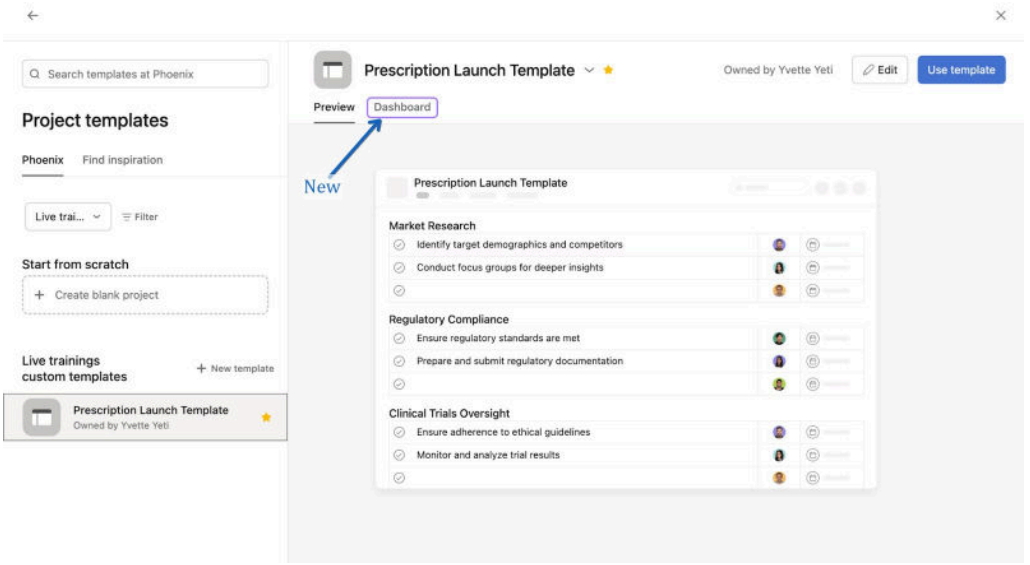
🗂️

Project Template Management Dashboard

Lists all projects created from a template, providing a centralized view to manage project duplications and iterations.

💙 **iDO Tips**: Track use of templates to see how your team adopts best practices

Plans: *Available on all the Asana plans*



More info

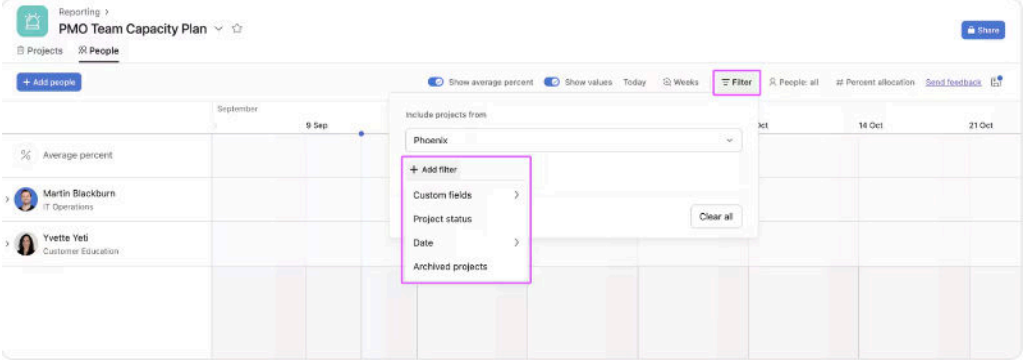
2- Capacity Planning

🔍

Capacity Plan Filter

Filter plans by status, custom fields, or dates to monitor workload and prioritize resources effectively.

Plans: *Available from Enterprise and Enterprise Legacy*



More info

Teams in Capacity Plan

Includes teams in capacity plans for more precise resource management and cohesive planning.

Plans: *Available from Enterprise and Enterprise Legacy*

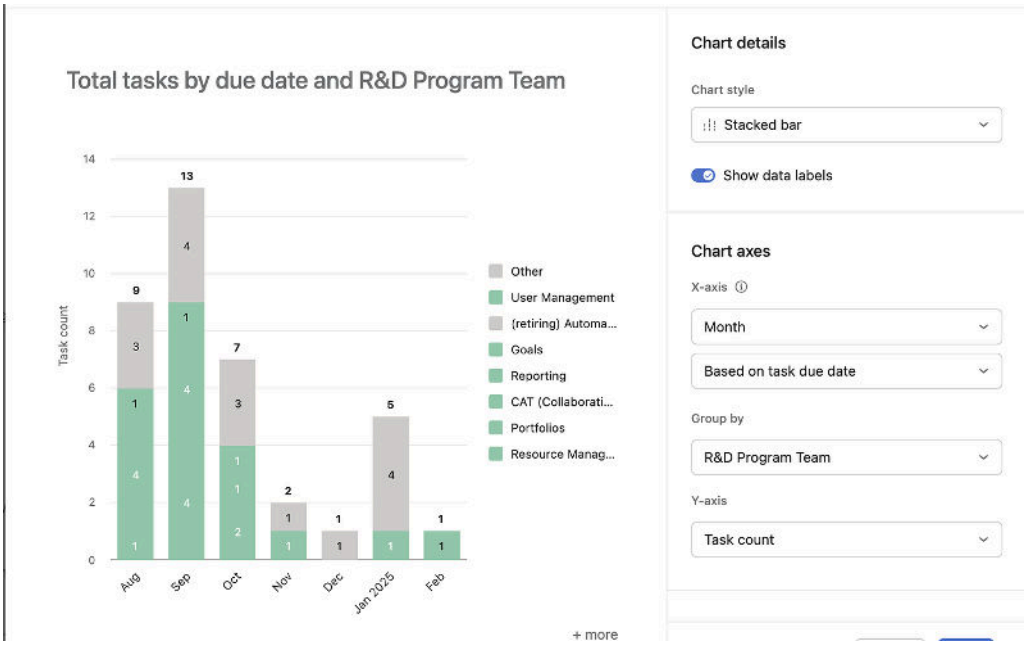
3- Data Visualization & Reporting

Date Histograms in Stacked Bar Charts

Stacked bar charts for improved visualization of temporal data.

💙 **iDO Tips**: Use stacked bar to combine 3 dimensions (instead of 2 with other charts)

Plans: *Available for on all Asana plans*



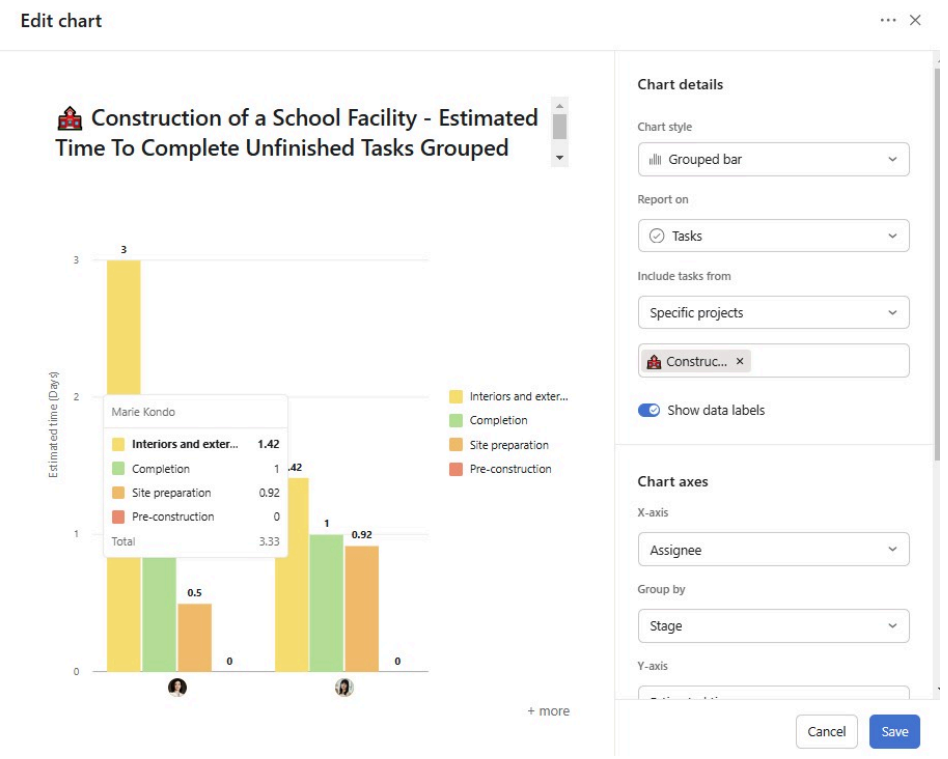
More info

Grouped Bar Charts

Groups multiple key datasets on a single Y-axis to easily compare essential metrics.

💙 **iDO Tips** Visualize performance data from multiple projects in a single chart

Plans: *Available on all Asana plans*



More info

4- Integration and Automation

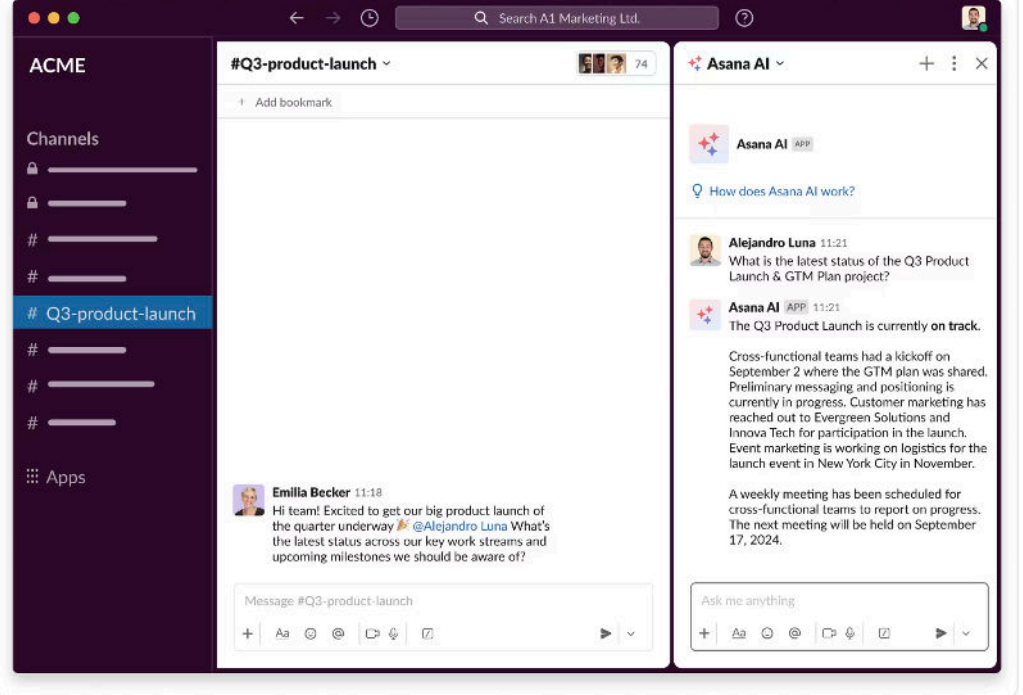


Smart Chat in #Slack

Allows you to ask Asana AI questions in Slack for quick answers and productivity boosts.

💙 **iDO Tips**: Encourage your team to interact with Asana AI to reduce the number of alignment meetings

Plans: *Available on all Asana plans (legacy plan and current plans)*



More info

🔄 Salesforce to Asana Automation

Synchronizes Salesforce updates with Asana to keep both platforms aligned and streamline business processes.

💙 **iDO Tips**: For each new Salesforce opportunity, automate critical steps to make lead management more efficient.

More info

📅 Enhanced Microsoft Outlook Calendar Sync

Keeps event data synchronized between Asana and Outlook so that schedules stay up-to-date.

💙 **iDO Tips**: Take advantage of this sync to integrate project deadlines into your Outlook meetings, ensuring an up-to-date planning.

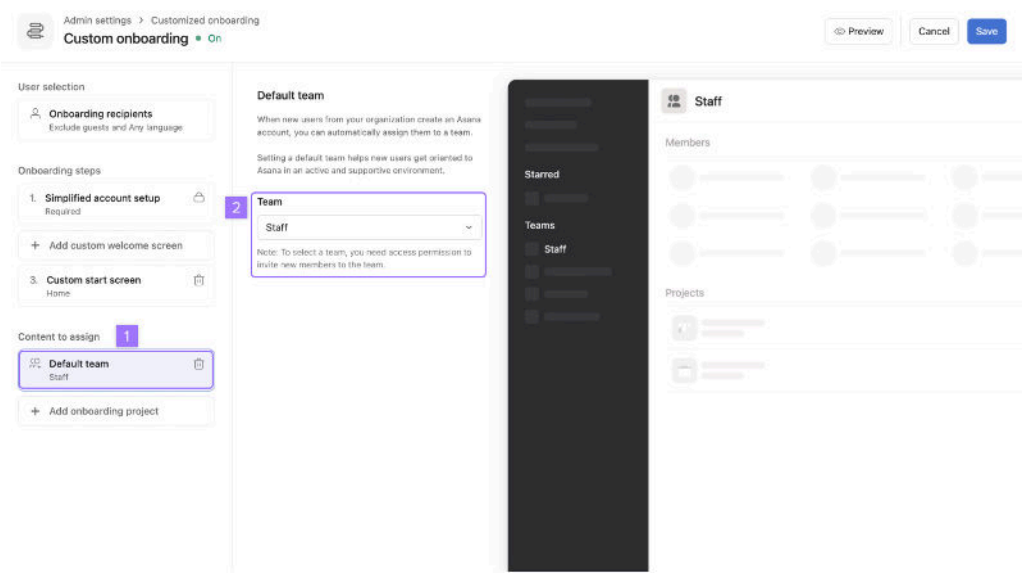
Plans: *Available on all Asana plans*

More info

🏢 Custom onboarding for Enterprise Divisions

Creates specific onboarding workflows for each division

Plans: *Only available from Enterprise plan (Divisions structure)*



More info

5- Mobile Task Management



My Tasks Group-by on mobile

Groups tasks by project and due date in the mobile app, providing optimized organization on the go.

Plans: *Available on all Asana plans*



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