UF Health Creative Services

Asana Quick Start Guide

Starting a new project.

Step 1: Consult the [Design Production Timeline](). The timeline is included on page 11 of this guide for easy reference — but it is subject to change. Click the link above to view the most up-to-date version. This chart determines what template you will need to select to ensure that your project has the correct tasks and amount of time allotted to each task.

Step 2: Go to Asana and navigate to the shared templates. If the templates are not easily visible from your Asana home screen, type “Template Cat X” in the home screen search bar **(Fig.1)**.

Step 3: Click “Use template” blue button. By clicking “Use Template” a copy of the template will be created for you to customize for your project. **(Fig.2)**

FIG. 1
Search field entry method

FIG. 2
Use template button

FIG. 1

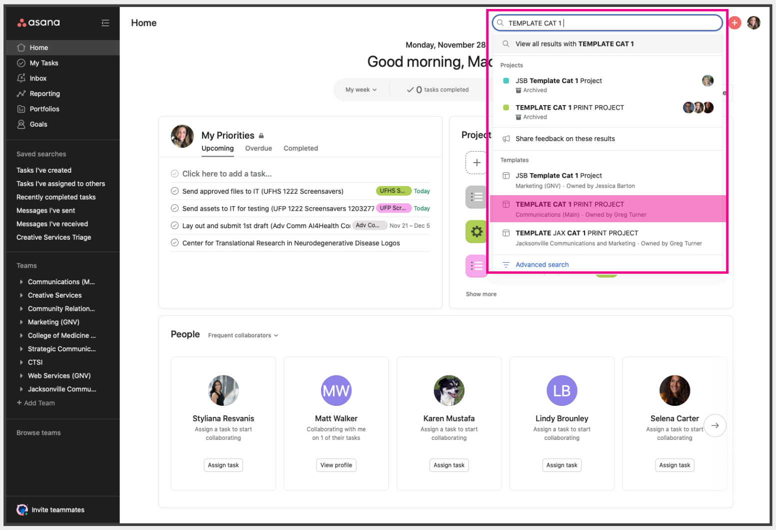
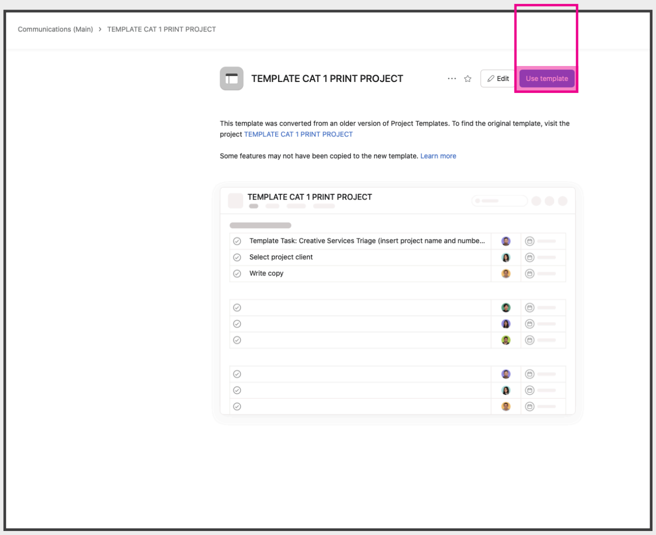


FIG. 2



Customize your project.

Step 1: Enter your unique project name. This name will replace “TEMPLATE CAT 1 PRINT PROJECT”. Don’t use underscores or special symbols. Approved naming guidelines are located here. **(Fig. 1)**

Step 2: Select your team. This will determine who can access your project.

Step 3: Keep Privacy as Public.

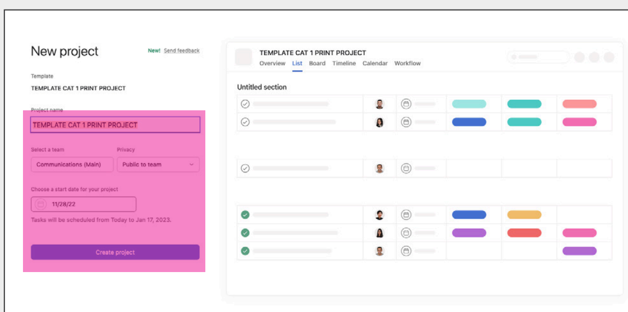
Step 4: Choose a start date. This date will be the next appropriate triage date (M/W/F before 9:30 a.m.).

Step 5: Click “Use template” blue button. A copy of the template will be created for you to customize for your project. Note: This will take a few minutes. You’ll know Asana is still working on it because a notification will appear at the bottom of the left corner to alert you. Do not refresh, click again or navigate away, as this may hinder the process. Your project should look like this **(Fig. 2)**.

FIG. 1
New project information

FIG. 2
What your new project should look like once generated

FIG. 1



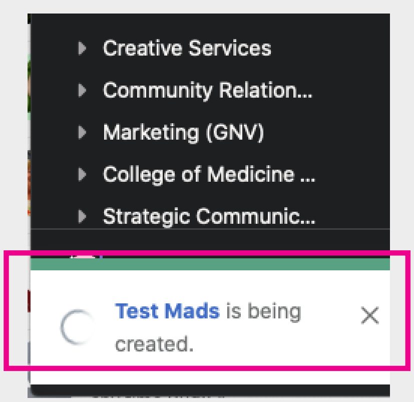
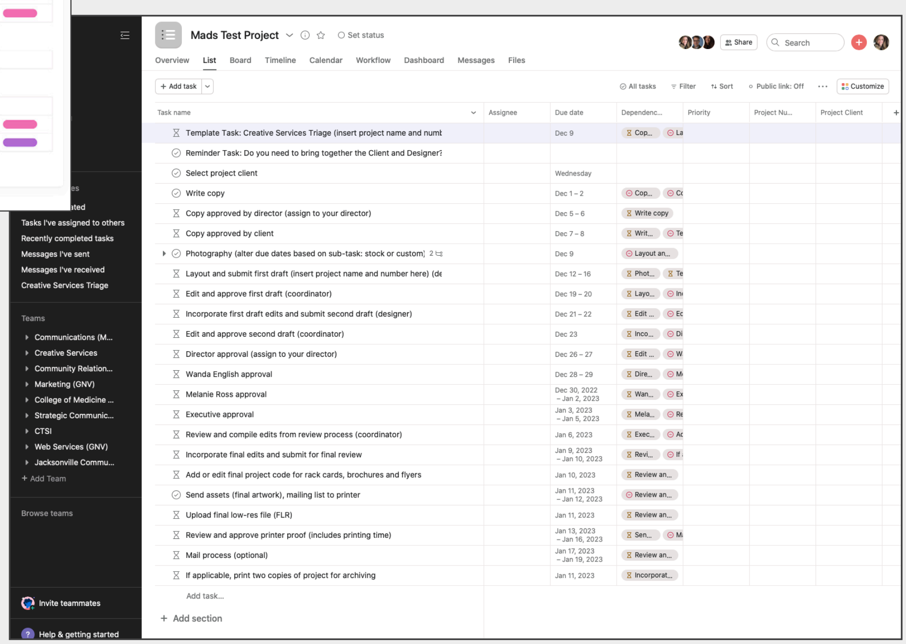


FIG. 2



Step 6: To add a task, you can either:

(a.) Right or alt click on a task to duplicate it, then rename.

(b.) Click the “add task” button at the bottom of the list.

(c.) Select the task previous and hit enter to insert a new task underneath. **(Fig.1)**

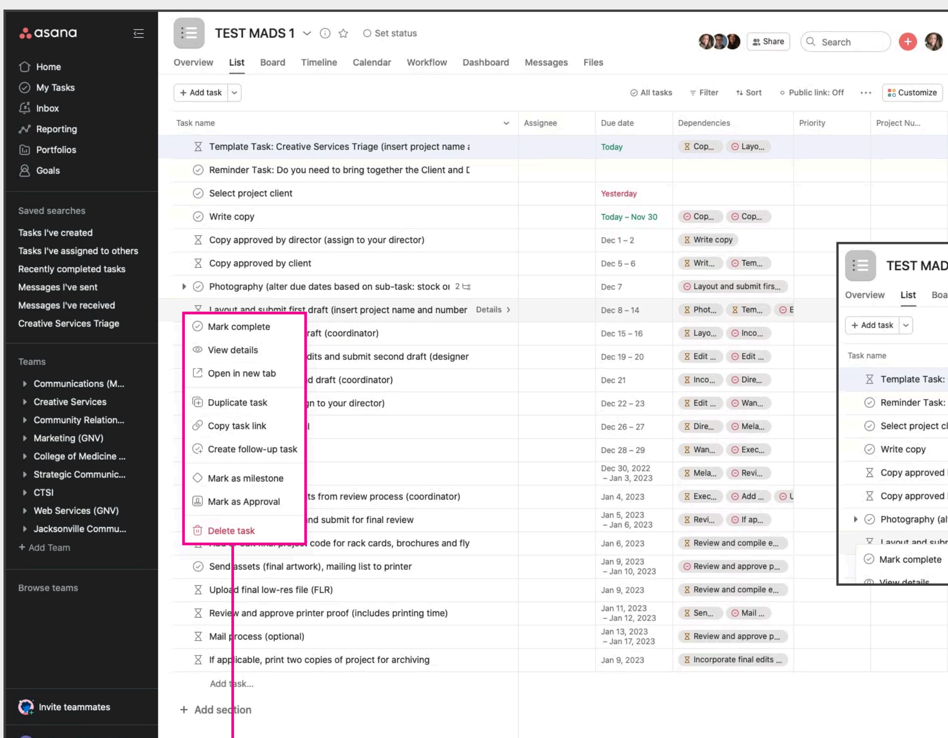
To delete a task, right or alt click on the task. A pop up window will appear. Select delete!

Step 7: Don’t worry, your dates will most likely be wrong. Using the production timeline as your guide, you can easily fix incorrect dates by clicking the date fields and inputting the correct amount of time for each task. You’ll notice a “Start date” to the left. You only need to concern yourself with that date field if your task spans a number of days. If your task is only one day, don’t click on “Start date” at all ... just use the field to the right for your single day date. **(Fig.2)**

FIG. 1
Adding or deleting tasks

FIG. 2
Handling single due dates and due date ranges.

For example, the Creative Services Triage task is only one day. Whereas the layout task will span 5 days, so you would select the triage date as your “Start date” and then count 5 business days out (excluding holidays) and that would be your end date.



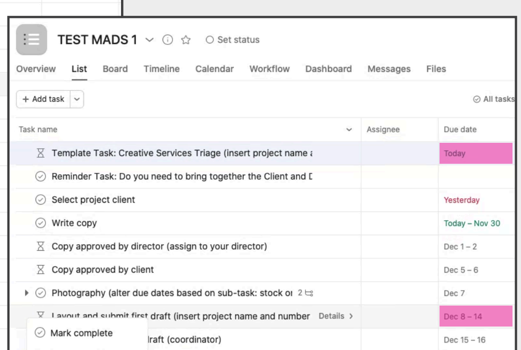


FIG. 2

FIG. 1
Adding or deleting tasks can be handled in the same pop-up window. Simply right or alt click to get this menu! Or quickly add blank tasks by selecting “add task” at the very bottom of the list!

REMINDER:
Triage is the closest M/W/F once you have your project ready for triage!

Preparing your project for triage - It's all about the Creative Services Triage Task:

Step 1: Click on the Creative Services Triage Task. A side panel should open. There is a "description" field where ALL DETAILS regarding your project go. **Not in comments, only in the project description field (Fig. 1).**

Step 2: The project description field contains sample copy to guide you with your entry. Please use the provided formatting and replace the sample copy with your unique project info.

Step 3: Project copy that exceeds 3-5 sentences should be provided in a Word document and included with other assets for the designer to download.

Step 4: Upload your assets. Content Word documents, photos, logos, referent PDFs with edits, etc. are considered assets. If you have more than 3-4 assets, please zip them before uploading.

Step 5: Check your work: To avoid delay in the triage process and an email from the triage team, check to see that you've followed these steps correctly. Are all the dates correct? Has the triage task date and description been updated properly?

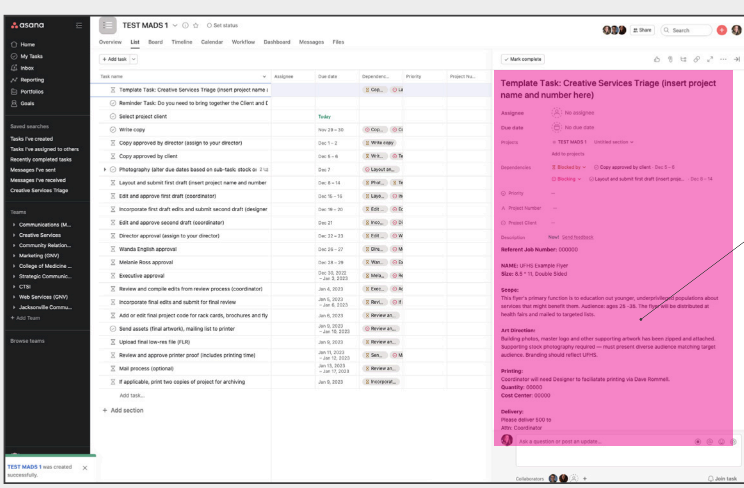
Step 6: FINAL STEP! Assign ONLY the Creative Services Triage task to Madelyn Hyder. To do this, click into the assignee field for this task and type Madelyn — her name should populate and select! The triage team will take it from here!

FIG. 1
Project description

HELPFUL HINT:
A "Referent" job number isn't your current project's Asana number. It's the project number of any previous project that this new project needs to emulate.

If your project was an Asana project but Publication Services did the job, please use their referent number.

NOTE:
Asana works in real time. When you assign a task, the person gets notified immediately. So, it's always a good rule to assign any tasks as a last step.



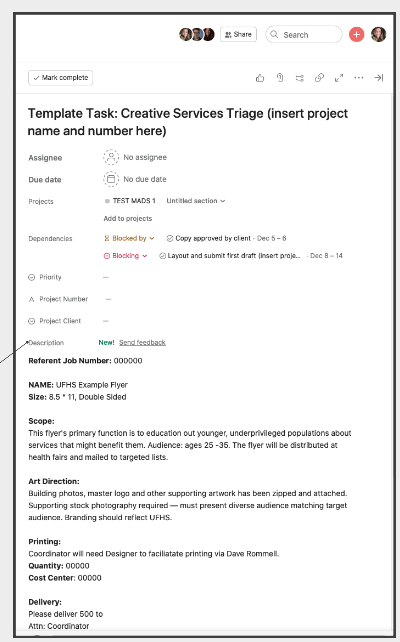


FIG. 1

There are potentially several people who might be involved in project review and editing. Approvals from you, a coordinator, a designer and an executive all might be required for your project. **All require the same sequence of events and have individual tasks associated with each person's role in the process.**

Scenario 1 — Coordinator to Designer Edits:
Once the designer has completed the edits and uploaded a new proof, they will mark their task complete. What do you — the coordinator — do next? Usually, you will need to look at the proof and make initial edits and then communicate these edits back to the designer, or if no edits are required, you would then potentially need to route the proof for executive approval. In the Cat 1 template, there are tasks for each step of this process. **It might seem strange but it's necessary to assign tasks to yourself, mark your own tasks as complete once done, and assign the next task in the process to the appropriate person. You are the captain of the ship — it's up to you to keep it on course!**

Note: tracking all steps correctly will help if projects get audited by senior leaders.

Scenario 2 — Coordinator to Executive Approval Edits:
If your project requires executive approval, the steps are the same — you're just using the next tasks down the line within the template and those tasks will be assigned to yourself and whomever you require approval from, in order of completion.

Once you have all edits back from this process, assign yourself the task to compile edits. Your job is to **clarify any questions and compile all verified edits into the last proof the designer provided** and then continue the editing process between you and the designer until the project is complete.

Continue to next page for the illustrated necessary steps for these scenarios.

Step 1: Assign yourself the task "Edit and Approve first draft"

Step 2: Open the "Layout first draft" task. This where the designer has attached your V1 proof.
You'll see the uploaded proof in two places — within the comment from the designer and directly above. These are the same files. **(Fig. 1)**

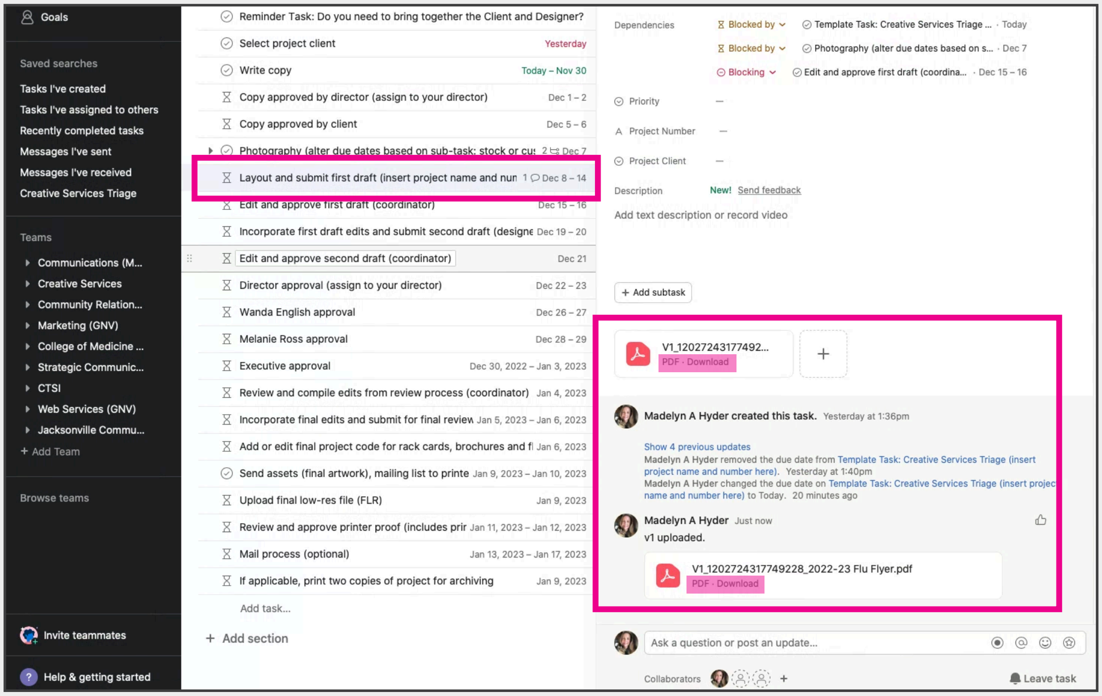
Step 3: Download the PDF and save to your desktop
Click the download button under either of these proofs. Follow prompts to save to your desktop.

FIG. 1
Where is the PDF proof?

HELPFUL HINT:
Upload your edited PDF within your task. Comment @designer that it's there. Mark your task as complete and remember to assign the designer their task.

NOTE:
DO NOT put multiple rounds of edited PDFs in one task. Each round gets its **own task assignment**. Simply add tasks as needed and name appropriately.

FIG. 1



Project Edits: Adobe Acrobat

Step 1: Open the saved PDF in Adobe Acrobat Reader.

Step 2: Make edits:

a. A toolbar is located on the right of the screen

b. Choose the comments icon from that side toolbar

c. You will now see a comments toolbar at the top of the PDF window that is specifically for your edits

d. Select the comment icon from that top toolbar . Your cursor should now be a little note icon.

e. Place that icon anywhere on the PDF that requires edits. This will open a window specific to each note you place in the sidebar, where you can physically type what is required.

f. Make sure to click “post” so that your comments lock in. Repeat this process until you’re all done with edits.

(Fig. 1)

Step 3: Re-save your PDF:

a. Choose from Acrobat’s top menu — File — Save As.

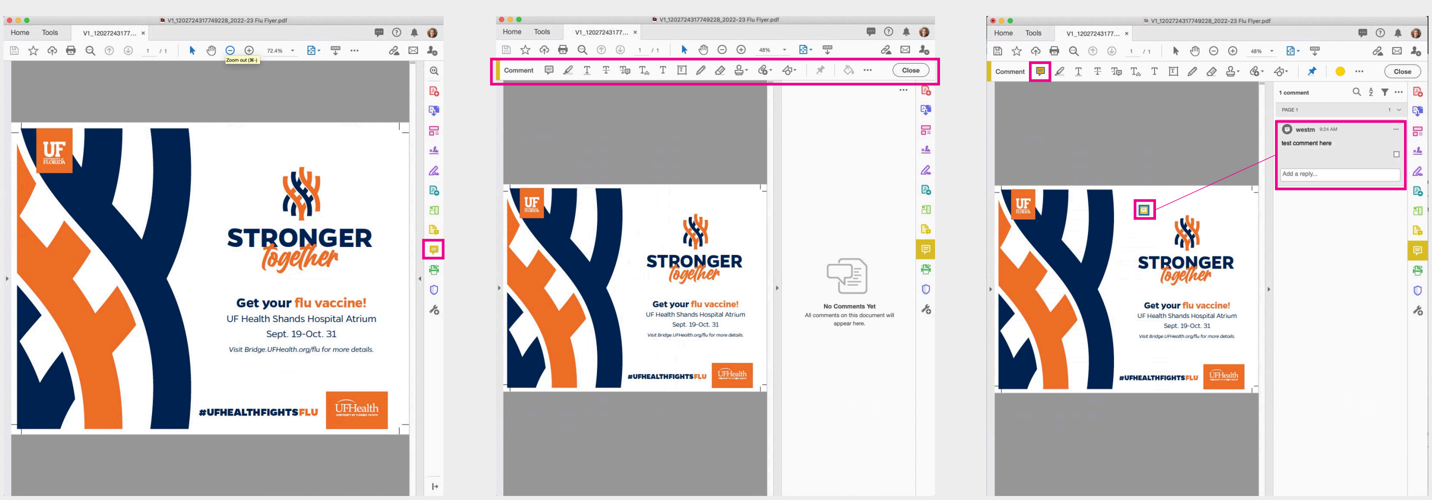
b. How you name the file matters! Rename the file using this convention:

“Your initials_V1_Asana Project Number_Project Name”

FIG. 1
Editing within Adobe Acrobat

IMPORTANT NOTE:
Naming conventions are vital to keeping the project moving. Never delete the original project name, just add your initials to the front of the existing name.

FIG. 1 (a-c)



You've finished: Uploading your edits back into Asana

Step 1: Click on your task "Edit and Approve first draft" to reveal the sidebar window.

Step 2: Upload your newly renamed PDF with edits. There are two ways to do this **(Fig. 1)**:

a. Drag your PDF from your desktop directly into the browser window where you are in your task. The area will turn light blue which shows that you can drop the PDF. It will begin uploading immediately.

b. Attach your proof in the comments section of the task. It's helpful to tag (@) the designer in this comment.

Step 3: Mark your task as complete **(Fig. 2)**.
There are two ways to do this:

a. Click the "mark complete" button within the sidebar of your task or,

b. Click the circle check mark in the task list

Step 4: Assign the next task to designer. To do this, click into the assignee field for the task and type the original designer's name. Be sure to check the date of the newly assigned designer task to ensure they know when you wish to receive your next proof. See design production timeline for guidance.

FIG. 1
Area where you would upload your edited proof:

(a) dropping it into this area

(b) attaching to a comment within the task

FIG. 2
There are two ways to mark your task complete. Either clicking the circle beside the task in the task list or by clicking the button at the top of the task sidebar panel.

IMPORTANT NOTE:
Repeat until done or ready for executive approvals. If more tasks are needed than what were supplied in the template, just add the tasks you need following the same format!

FIG. 1 (a-b)

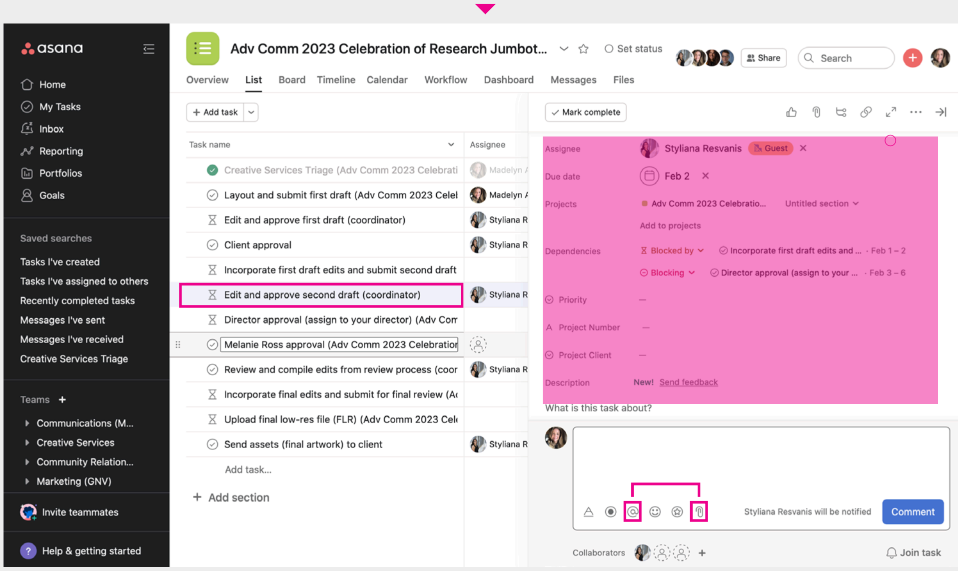
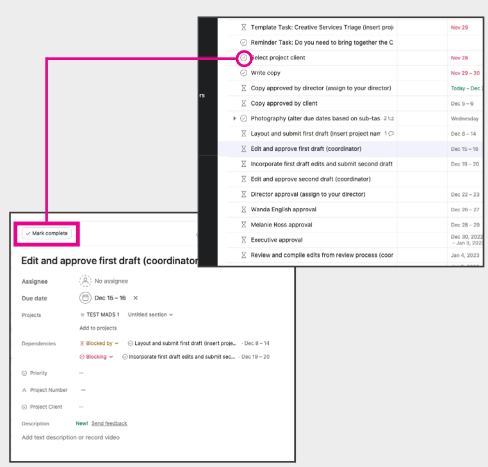


FIG. 2



Triage meetings
M/W/F 9:20 am

Updated March 2019

UF Health Creative Services

Design Production Timeline

Please note

Projects must be submitted by 9:00 am and contain all assets to be triaged. You can expect a first draft by 5:00 pm on the day your first draft is due. Your project's start date is the day it's triaged. **Triage is M/W/F @ 9:20 am.**

While the Workfront templates have the below timelines built in, Creative Services designers reserve the right to renegotiate a start/due date based on current project volume and asset acquisition.

	Layout and submit 1st draft (designer)	Edit/Approve 1st draft (coordinator)	Incorporate 1st draft edits and submit 2nd draft (designer)	Edit/Approve 2nd draft (coordinator)	Leadership and legal approval (if applicable)	Review and compile edits from approval process (coordinator)	Incorporate final edits and submit for final review (designer)	Printing (if applicable)	Mailing (if applicable)	Max time to completion
Category 1	5 days	2 days	2 days	N/A	10 days *	1 day	2 days	2 days (if applicable)	2-3 days	25 business days (5 weeks)
Category 2	7 days	3 days	2 days	3 days	10 days *	2 days	2 days	3-5 days	3 days	35 business days (7 weeks)
Category 3	9 days	5 days	5 days	3 days	10 days *	2 days	3 days	3-5 days	5 days	45 business days (9 weeks)
Category 4	17 days	5 days	7 days	3 days	10 days *	3 days	3 days	7-10 days	10 days	66 business days (13 wks)
Category 5	TBD	7 days	7 days	5 days	25 days	3 days	5 days	7-10 days	7-10 days	TBD based on prodution schedule

Category 1	Category 2	Category 3	Category 4	Category 5
Billboard	Animated web banner	Bi-fold brochre	Booklet >8 pgs	Annual report
Fact sheet	Billboard	Brochure	Editorial spreads	Board books
Flyer	Brochure (template)	Custom artwork	Holiday card (complex/ multiple iterations)	Vehicle wrap
Email graphic	Flyer	Displays	Newsletters	Signage/wall art
Map (update)	Hanging banner	Digital holiday card	Promo/Donor packets	Information packs
MD bios	Invitation/Envelope	Map	Special folders	Magazines
Postcard/mailer	Postcard/Mailer	Newsletters (template)	T-shirt design	Special Mailers
Print ad	Posters	Screensavers		Multi-faceted pieces
Rack Card	Rack Card	Self-mailers		

Templated Items ***Non-Templated Items***

Note: These times are for reference only and may be adjusted by creative services to accomodate any special circumstances.

Prior to Production

- Creative brief
- Photo shoots
- Distribution
- Billing
- Delivery
- Miling
- Packaging
- Copy approval

Edits for Previous Jobs

If you need to make edits to a previously completed job, then when entering the new job into WF for those edits, use the appropriate category for the product and defer to that category's timeline unless an accelerated timeline for those edits is needed. In that case, please communicate directly with the traffic manager to expedite the job via WF update or email.

Start with Column 3 for minor text edits (e.g.: dates, phone numbers, addresses, names, etc.), photo swaps (including logo swaps) or resizes that maintain the structure and orientation of the original. Creative Services reserves the right to assess a project to ensure it meets this criteria.

Start with Column 1 if your edits require a text reflow or reformatting layout.

* **Allot 2 days each for:** 1) Director of Marketing; 2) Assoc VP Comm/Public Affairs, Strategic Comms & Public Res; 3) CCO; then 4 days for UFP & legal review.

Click this link for the most current [Design Production Timeline](#).