SENDANA ADD

Instructions

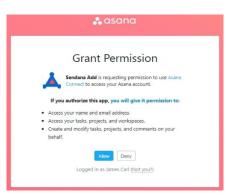| HOSTING WEBSITE FOR SENDANA ADD |
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https://www.sendanatools.com/

WHAT CAN YOU DO WITH SENDANA ADD?

SENDANA ADD is a hosted utility to allow the user to do one or more of the following:

- **Create a new <u>list</u> project <u>from an</u> existing list project with multiple options within your Workspace or Organization**

- **Create a new <u>board</u> project <u>from an</u> existing <u>board</u> project with multiple options <u>within</u> your Workspace or Organization**

- **Create a new list project <u>from an</u> existing list project with multiple options <u>to and from</u> another Workspace or Organizations that you have permission to create list projects**

- **Add tasks <u>from an</u> existing <u>list</u> project with multiple options <u>to an</u> existing <u>list</u> project within your Workspace or Organization**

- **Add tasks from an existing <u>list</u> project with multiple options to an existing <u>list</u> project <u>to or from</u> another Workspace or Organization that you have permission to create tasks.**

- **<u>Adding tasks to an existing Board project is not supported by SENDANA ADD because of the potential of column mismatch.</u>**

- **You will be able to create as many lines of various combinations in your CSV template as you desire allowing mass production of the functions of this tool.**

GRANTING PERMISSION FOR SENDANA ADD

The first time you attempt to use **SENDANA ADD** you will be required to Grant Permission to this integration with your Asana account. The screenshot will be as follows:

You must click **Allow** in order to Grant Permission to integrate with your Asana account. The authentication will only be required once for your Asana account.

IMPORTANT INFORMATION REGARDING SENDANA ADD AND YOUR ACCOUNT

- **SENDANA ADD** will always default to the last Asana account that you used for the utility
- If you have multiple Asana accounts that you wish to Grant Permission for **SENDANA ADD** to use, you must log out of your current Asana account as well as exiting **SENDANA ADD** and close its tab.
- To Grant Permission to an additional Asana Account to be used with **SENDANA ADD** you must then log into your additional Asana Account and then go to **https://www.sendanatools.com/**
- You will first be asked to agree to the terms of use and then be asked to Grant Permission to the additional Asana account to use **SENDANA ADD**.
- After you have followed this procedure for all Asana accounts you desire to use with **SENDANA ADD** each will have granted the permission to use **SENDANA ADD**. Generally, most people do not have multiple Asana accounts and will only need to Grant Permission to their main account.

- **SENDANA ADD** can create/add from your main account log-in for any Organizations/Workspaces that you are a member or guest and you have the authority to add tasks into the project.
- **SENDANA ADD** will show you which of your accounts you are logged into at the top of the screen beginning with Hello combined with the email address you have created your Asana account with.
- **CUSTOM FIELDS** **creation and modification** is restricted by Asana to members of an organization/workspace only. Custom field **population** is allowed by both members and guests. Additional information on projects containing custom fields will be discussed later in this document. You can only create task using Sendana Add if you are logged into the Asana Account you desire to create custom fields shown at the top of Sendana Add.

TEMPLATE DOWNLOAD

- **DOWNLOAD from the menu item Template one of two templates for your use in creating the necessary Upload file for processing. If you are using a Free Version of Asana, download the Free Version Template. If you are using a Paid Version of Asana download the Paid Version Template. The templates are CSV files which can be open in any Notepad type program but preferably Microsoft Excel as you will then have more flexibility to copy rows etc.**
- This downloaded file should always be saved as a CSV file for importing into the utility for processing
- You must have Asana privileges in order to create a new project

WORKSPACE/ORGANIZATION/PROJECT INPUT

The following is information you will provide within your CSV Template:

Workspace Or Organization

Target Workspace Or Organization

Target Team

Source Project Name

Recipient Project Name

OPTIONS

The following are options available to you to customize your creation process through your CSV Template:

Copy to New Project	Y/N
Task Description	Y/N
Assignee	Y/N
Subtasks	Y/N
Attachments	Y/N
Tags	Y/N
Task Followers	Y/N
Project Members	Y/N
Other Projects	Y/N
Due Date	Y/N
Start Date	Y/N
Dependencies	Y/N
Custom Fields	Y/N
Custom Field Content	Y/N

IMPORTANT INFORMATION

- If you are a Paid User of Asana and you utilize Custom Fields you must have the privilege to create custom fields https://asana.com/guide/help/premium/custom-fields#gl-field-permissions
- Because Sendana Add is using the Asana API to create new tasks or a new project it is slower than Asana can create individually while within Asana but….
- Sendana Add was designed for cross Asana account duplication, <u>multiple additions</u> of new projects or adding tasks to existing projects. Significant flexibility to choose the options that you desire
- **Processing time using the API will take longer than simple duplication within Asana approximating about 5-7 minutes for a 50-task project. Speed will depend on your internet connection and the complexity of your Project Tasks. <u>Do not think the program has crashed if your left bottom corner continues to indicate "waiting on stratelyzedemo.com"</u>**
- You can add multiple lines to the file that will be processed one at a time. This is the basis of mass additions. While it may take more time, you can start the process and allow the completion while you do other things

CUSTOM FIELDS

- <u>**CUSTOM FIELDS**</u> Custom Field creation and population are limited by the Asana API by the following rules:
  - New Custom Fields cannot be created by a guest but only a full member of a Workspace or Organization. Consequently, you can only create and populate Custom Fields in the Workspace or Organization that you are an <u>authorized member</u> in Sendana Add and listed in Column A
  - If Column A and Column B are identical and you are an authorized member, <u>and you are logged into the respective account in Sendana Add</u> you can create a new project and the custom fields of the Source Project Name (Column D) will be created and populated in the Recipient Project Name (Column E)
  - If Column A (Workspace or Organization) and Column B (Target Workspace or Organization) **<u>do not match</u>** and you attempt to create

a new project or add tasks containing custom fields , no custom fields will be created.

- o You will receive an error message listing the Custom Fields in the Source Project Name (Column D). The project nevertheless will still be created.
- o If Column A (Workspace or Organization) and Column B (Target Workspace or Organization**) do not match and you desire to copy tasks only without creating a New Project, Column E (Recipient Project Name) must have at least the same Custom Fields as Column D (Source Project Name) for the fields to be populated and you must be logged into Sendana Add with the matching accounts in Column A and Column B.**

INSTRUCTIONS FOR PROCESSING YOUR REQUEST

- Using Sendana Add requires very basic input but you must accurately type the names in the columns applicable to reflect the exact names used in your source or existing projects in Asana
- Erase the sample information on the second row of this template to create your own
- The entire input required to run the utility is summarized as following:
    - o **Workspace or Organization**- The exact Workspace or Organization name which is the location where your Source Project resides This **is case sensitive** for your Workspace or Organization as titled in Asana without any additional spaces. Any Workspace or Organization which you are a member or guest can be used to **add tasks** to another existing project.
    - o **Target Workspace or Organization**- The exact Workspace or Organization name where a new project will be created, or an existing project will have tasks added to. This **is case sensitive** for your Workspace or Organization as titled in Asana without any additional spaces. If you are creating a new project with Custom Fields this must be the same name as the Workspace or Organization above. Any Workspace or Organization which you are a member or guest can be used to **add tasks** to another existing project.

- **Target Team-** The exact name **which is case sensitive** of the Team where your project target will reside without any additional spaces
- **Source Project Name-** The exact name **which is case sensitive** without any additional spaces that your project is titled in Asana
- **Recipient Project Name-** The exact name **which is case sensitive** you choose for your new project if you are creating a new project, or the exact name of an existing project without additional spaces if you are adding tasks
- **Copy to New Project-** This is the most important driver of what you want to accomplish with Sendana Add. There can only be one of two values **Y=Create New Project or N=Add Tasks to Existing project** from Source Project Name. Custom Fields cannot be created in a new project if your Target Workspace or Organization does not match your column A Workspace or Organization. The copy will proceed without the creation of Custom Fields. If this is marked N and your Recipient Project Name has at least all the identical Custom Fields of your Source Project Name, the data will be created. Please carefully read the previous documentation on Custom Fields

- **Adding tasks to an existing Board project is not supported by SENDANA ADD because of the potential of column mismatch.**

- **Task Description-** You must enter a Y to include or a N to exclude this field
- **Assignee-** You must enter a Y to include or a N to exclude this field
- **Subtasks**- You must enter a Y to include or a N to exclude this field. **Sendana Add is limited to one level of Subtasks**
- **Attachments**- You must enter a Y to include or a N to exclude this field
- **Tags**- You must enter a Y to include or a N to exclude this field
- **Task Followers-** You must enter a Y to include or a N to exclude this field
- **Project Members**- You must enter a Y to include or a N to exclude this field

- o **Other Projects-** You must enter a Y to include or a N to exclude this field
- o **Due Date-** You must enter a Y to include or a N to exclude this field
- o **Start Date-** You must enter a Y to include or a N to exclude this field (Paid Subscriptions Only)
- o **Dependencies-** You must enter a Y to include or a N to exclude this field (Paid Subscriptions Only)
- o **Custom Fields-** You must enter a Y to include or a N to exclude this field (Paid Subscriptions Only). Please note the previous documentation on Custom Fields
- o **Custom Field Content-** You must enter a Y to use the current content of the Custom Field or an N to just create the Custom Field without content. Please note the previous documentation on Custom Fields
- After you have populated your CSV input file, please save to a location of your choice
- The hosted utility will ask you to select the file for processing by clicking the Upload button
- Once you have uploaded your file, just click the Process button and wait for the creation to complete
- Remember the more lines you have and the more tasks you are trying to create, the more time it will take to complete. You will receive a message at the end that the process has completed successfully

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CREATING NEW PROJECTS OR ADDING TASKS CONTAINING CUSTOM FIELDS WHEN YOU ARE A GUEST

- Asana limits the creation or modification of custom fields to paid users who are a member of the account where the project resides.
- As a result of this limitation you can still use this utility, but the custom fields must be created and populated after the project is created.
- Alternatively, you can create a Project, add the custom fields that exist in your source project and then use **SENDANA ADD** to copy tasks from your Source Project Name to your newly created Recipient Project Name.

TECHNICAL SUPPORT

- **Should you require technical support feel free to email Support@stratelyze.com**