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## *Office of the Mayor*

**To:** All City Department Heads

**From:** Julia Glanz, Asst. City Administrator 

**Subject:** ASANA & Legal Tracking

**Date:** August 26, 2015

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This memo is to serve as a reminder of how to properly use ASANA. We will be using ASANA as the primary way to send items to manage the legislative agenda. This includes, but is not limited to: resolutions, ordinances, MOUs, and contracts.

ASANA has new reporting capabilities that will allow the City to better understand what is outstanding and what has been completed. The IT Department or Asst. City Administrator would be happy to help you if you have any questions.

### ASANA Refresher

1. Log into asana.com, if you forgot your login information click the "forgot your password" link under the password box.
2. Look to the left hand column where all "project folders" are located.
3. Click More Projects to expand the list. There are Work Session and Legislative Session Folders along with Departmental Folders.
4. Departmental Folders is your place to create and store legislative items or other projects until they have been reviewed by legal and are ready to go into a Work Session or Legislative Session folder.
5. When you create a new project, do not assign any followers from the Mayor's office. Only assign as followers those people from your department or other departments who will be actively participating in the development of the project ex: Paul Mauser is working on a Bike Lane grant and assigns Amanda Pollack to help with collaboration.
6. Once the legislation is completed by the department it must go through legal. Please **drag** your item from your departmental project folder into the City Attorney Project Folder. Once in the folder, assign Mark Tilghman by clicking the "+", under the comment button. Notes must be added about specific tasks that must be completed in the comment section.

- a. If you are collaborating with another department be specific in the comments on where Mark's office should put the legislation once it is reviewed.
7. The City Attorney's Office needs **at least** 10 days to review items. Larger contracts should be given more time.
8. When you put an item in the City Attorney Project folder you need to assign a due date for the review to be completed. The latest due date should be the date items are due in ASANA for Admin to review. That is 10 days before a Work Session or Legislative Session.
9. The Due Date tab is in the right column on the top tool bar. Once a date is selected it will show up red if it is past due. If more time is needed please update the due date.
10. After legal reviews the legislation they will place it back in the Department Folder that originated the document, unless otherwise specified. It is the Department Head's responsibility to then place it into the appropriate Work Session or Legislative Session Folder.
11. Remember a signed, **up to date**, memo in PDF form must be included in ASANA, no hardcopies. Only the most recent versions of Resolutions, MOUs, and Ordinances should be in the Work Session or Legislative Session Folder, in Word format. Please delete older versions.
12. When putting the legislation in the appropriate Work Session or Legislative Session folder please add the Asst. City Administrator as a follower. This can be done by clicking the "+" button below the comment button and typing in the correct name.
13. Originators are responsible for moving, or "dragging", items in ASANA from their creation to 1<sup>st</sup> reading. If changes are made between any step in the process, it is the originators responsibility to add those changes or get help from the City Attorney before the deadline and placed back in the correct folder.
14. Remember to **drag** items from folder to folder, and NOT create new items in each folder. We do not want multiple copies of the same legislation in different folders.
15. When an item has passed or failed with Council the Asst. City Administrator will go into ASANA and mark the item as completed.
16. Only if staff utilizes the due date and completed tabs will ASANA be an effective tool to understand what is outstanding with the Legal Department.

Please utilize the Planning Agenda to see when items are due. If you know you will not have an agenda item completed on time please alert the Asst. City Administrator.

Please share this memo with all staff that sends items to Legal and puts projects into ASANA.