

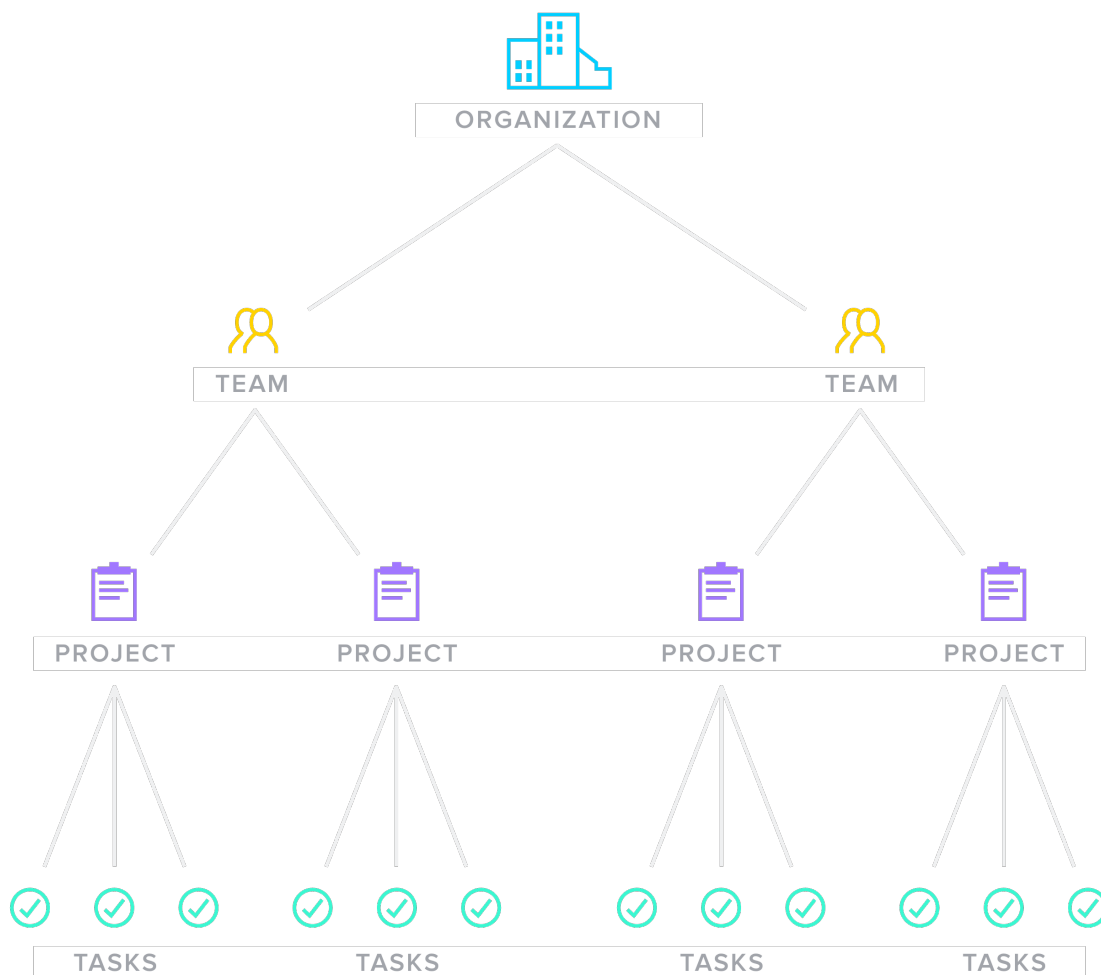
# Onboarding checklist

Asana is the easiest way for teams to track their work and get results. If you're joining a team that's already using Asana, this onboarding checklist will get you up to speed.

We recommend displaying this checklist in another browser window so you can follow along as you get to know Asana. You can also download and print this out for reference.

## 1. Understand Asana

Your team's work and conversations are centralized and searchable in Asana. Before you dive in, let's go through how Asana is structured:



**Organizations** are the highest level of hierarchy for your business. They are associated with your business's email account and include all teams.

**Teams** are groups of people in your Organization who work together. Teams can be made up of departments in your company (Engineering, Marketing, Design, Recruiting, etc.) or any group of people who need to work on a set of projects together.

**Projects** organize your team's work into lists or boards. Create projects for your team's latest initiative (i.e. Website Launch), goals you're working towards, brainstorm, meeting agendas, or any work that requires many steps or teammates.

**Tasks** break down your project into actionable steps. Tasks can be to-dos, requests for teammates, reminders, or ideas.

## 2. View and join teams

Now that you understand the basics, it's time to browse and join some teams. Since you're a member of an Organization, you've probably been invited to a team already.

Look at the sidebar on the left to view the other teams in your organization. Request to join one if you'd like to access the team's projects and collaborate with other people in the team.

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### ASANA TIP

Nested under each team name, you'll find team conversations (generally used for team-level discussions, announcements, etc.) followed by a list of your team's projects.

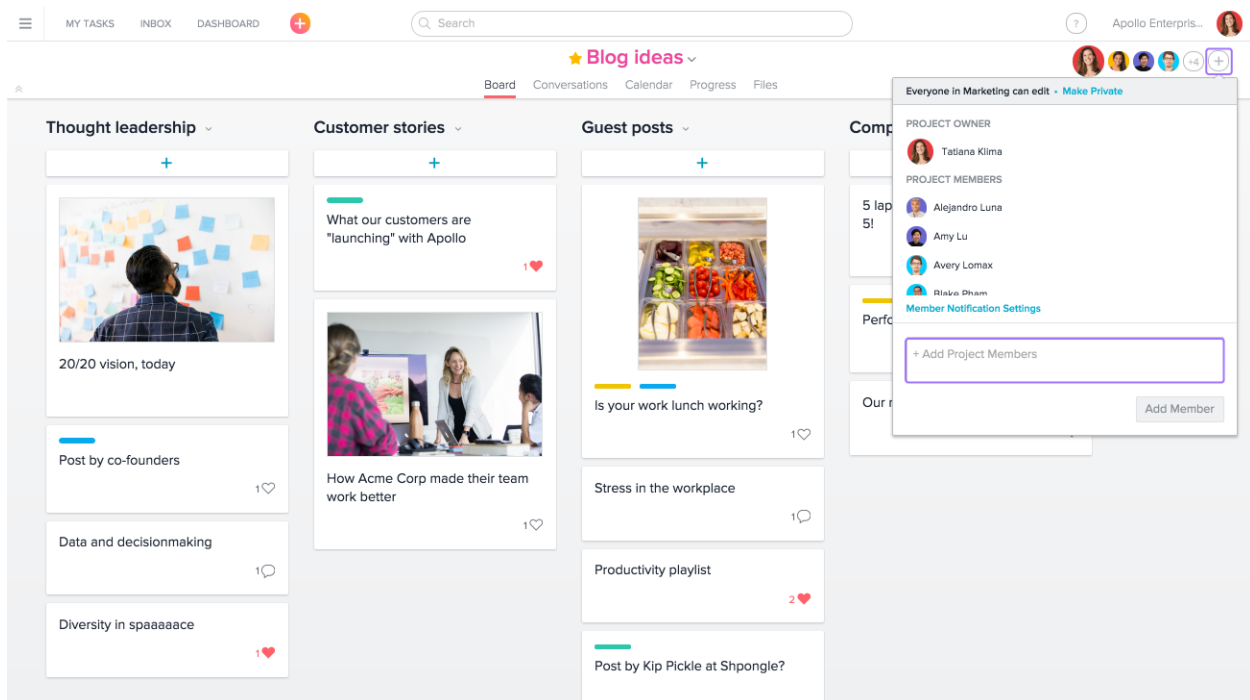
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### 3. Join projects

You can view a project as a task list or a board (and within a project, you can see calendars, conversations, and progress charts). Use projects to track and organize all the tasks related to a specific initiative, like a product launch or campaign.

Look at the sidebar on the left to see the team(s) you joined in Asana. Click on the carrot to the left of the team name to see a list of all the public projects on the team. Start to explore the work in them, and ask your teammates about the projects you should join.

To join a project, click the + **button** in the top right corner of the project.



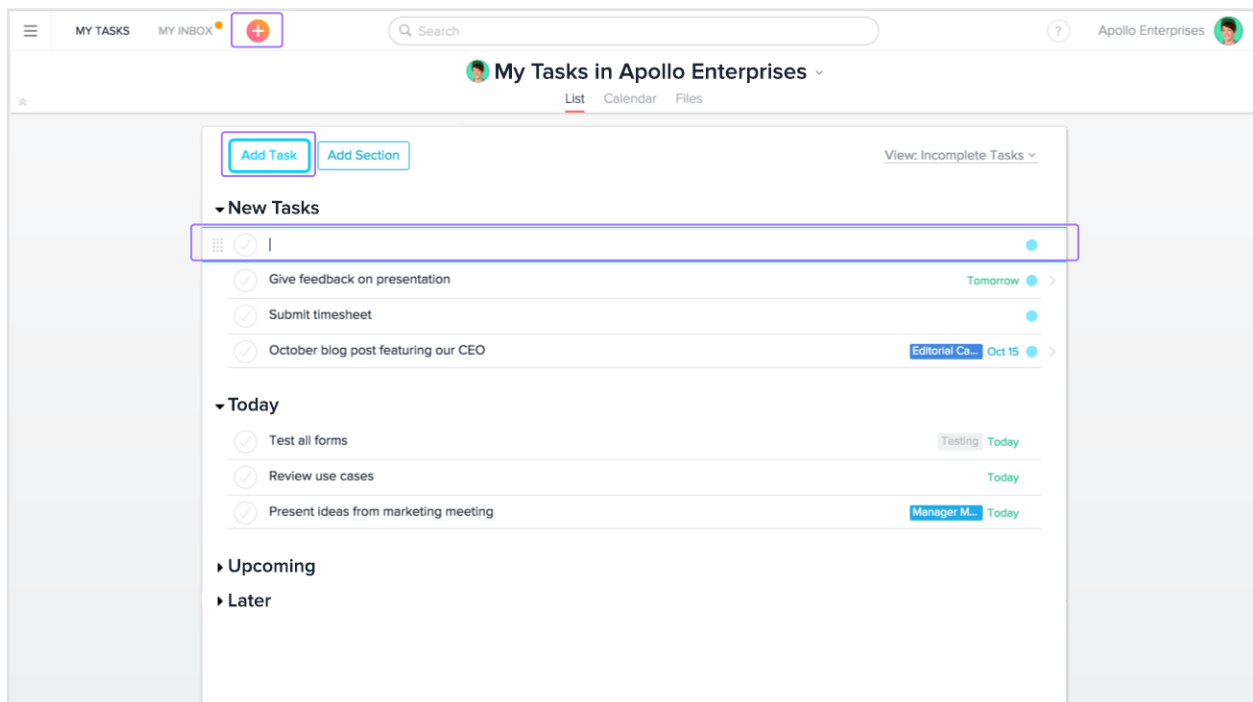
To create a project of your own, just click the large + **button** in the top bar and select **Project** from the drop-down. Give your project a clear and goal-oriented name and description. Projects are made public by default, but you can set the privacy and select the team in which the project will live (via the dropdown arrow).

You can also try an Asana-created template. Our templates make it easy to add new workflows into Asana from the start. Click the + **button** and select **Project**, then click on the **Templates** tab. You can preview the templates then create the project and further customize it for your team. We even have an Asana onboarding template!

## 4. Assign and complete tasks

Tasks are the basic unit of work in Asana, and they can represent a variety of things: actionable to-dos, ideas that you want to keep top of mind, or simple reminders for yourself like, “send vacation request to HR.”

Creating tasks in Asana is simple. In a new or existing project, select a line in the main pane and just hit **Enter**, or add a task directly from the top bar using the **+** button.



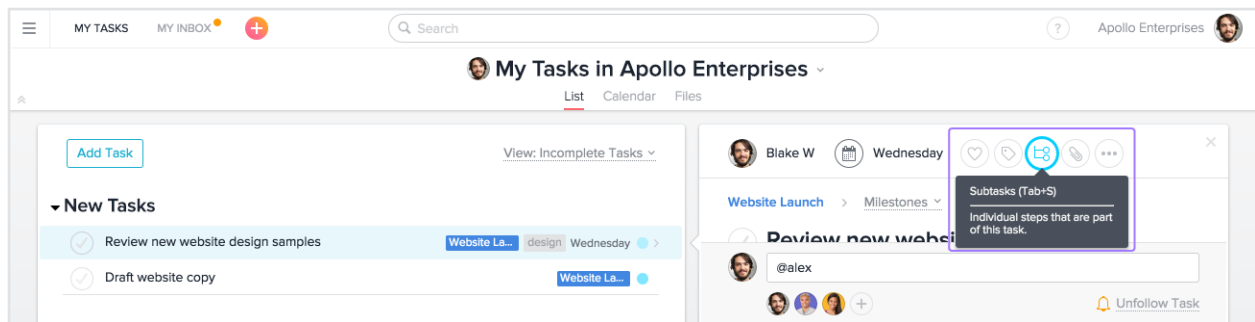
Now try it out for yourself: Create a new task with a call to action and assign it to yourself or a teammate. Be sure to give your task a name, a description and a due date so everyone knows who is responsible for doing what by when. You can also add the task to a project so that it can be easily found.

When should you complete a task? The rule of thumb is: When you finish the work, mark the task complete!

## 5. Add subtasks and attachments

You can do more even more with tasks by adding subtasks and attachments.

**Subtasks** break tasks into smaller parts. When tasks are complicated or more than one person is responsible, create subtasks. Subtasks function similarly to independent tasks with their own assignees, due dates, and descriptions, except they're embedded in a parent task.



To create a subtask, click the **subtasks** button next to the due date field in the right pane. Or, press **Tab+S** on your keyboard after you select a parent task. After you've created one subtask, select the subtask and press **Enter** on your keyboard to create another.

You can also use **attachments** to easily share files related to a task. Attach them to a task by clicking the paperclip icon at the top of the right pane. You can attach files from:

- Your computer
- Dropbox, Google Drive, or Box

## 6. Comment on and follow tasks

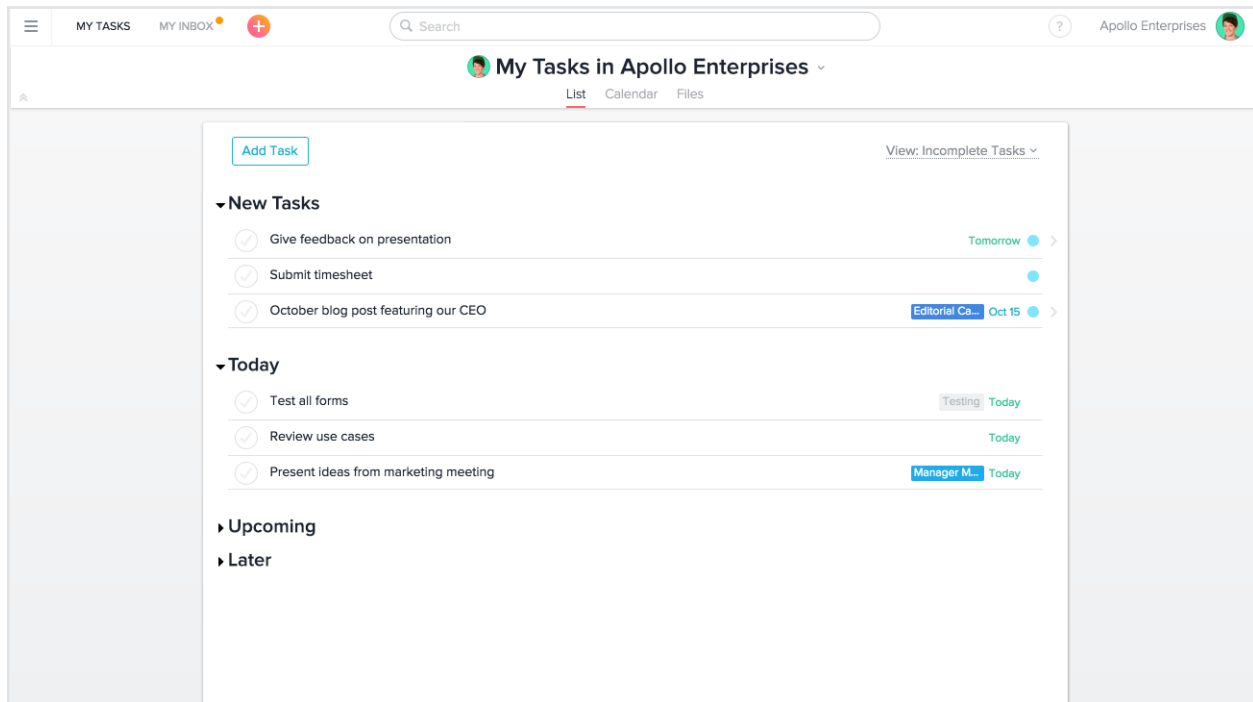
**Comment** on a task to ask questions, or offer extra information and insight.

**Follow** a task to stay informed on comments and changes. Followers of a task will receive notifications via My Inbox (in Asana) and email, according to their notification settings. To add yourself or someone else as a follower, use the **Tab+F** shortcut or click the + **button** at the bottom of the right pane.

If you're getting notifications for a task that you're no longer working on, you can unfollow by hovering over your photo in the followers field and clicking **X** or click **Following** at the bottom of the right pane. You can also unfollow tasks and projects via My Inbox.

## 7. Plan your day with My Tasks

My Tasks is your view of all the tasks that are assigned to you. It should be your first stop in the morning, as well as something you reference throughout the day to recalibrate your priorities.



All new tasks that you create in My Tasks are automatically assigned to you and private to you. You can add them to projects to make them visible to the rest of your team. Use My Tasks to organize your day by reviewing tasks in your New Tasks section and marking them with a priority of Today, Upcoming, or Later:

- Drag and drop tasks to any section
- Click on the blue dot to access the drop-down list and select a section
- Select the task(s) and use the shortcuts:  
**Tab+Y** (Today), **Tab+U** (Upcoming), or **Tab+L** (Later)

Give it a try and prioritize a few of your new tasks. You will only see the New Tasks, Today, Upcoming, and Later sections if each has at least one task.

## 8. Stay Informed with My Inbox

My Inbox is your notification center in Asana. Notifications for the tasks and conversations that you're following are sent to your Inbox. Navigate to it from the top bar.

My Inbox, similar to an activity stream, lets you see what's been happening and where you might want to focus your attention. You'll see an orange dot next to My Inbox if there are unread notifications.

You'll receive a notification in My Inbox when:

- A task is assigned to you
- A task is unassigned from you
- A task that you're following is completed
- A file is added to a task you're following
- You're added as a follower to a project
- A due date is changed on a task assigned to you
- A task assigned to you is due today
- A comment is added to a task you're following
- Your comment, attachment, or task completion is hearted
- A task you're following is hearted

Once you get used to checking My Inbox regularly, you may want to turn off email notifications. You can adjust your email notification settings from the drop-down at the top of My Inbox, or from My Profile Settings.



## 9. Customize Asana with My Profile Settings

To customize your account, click your profile picture in the upper right corner of Asana and select My Profile Settings. If you haven't uploaded a profile picture yet, click on the circle with your initials in it.

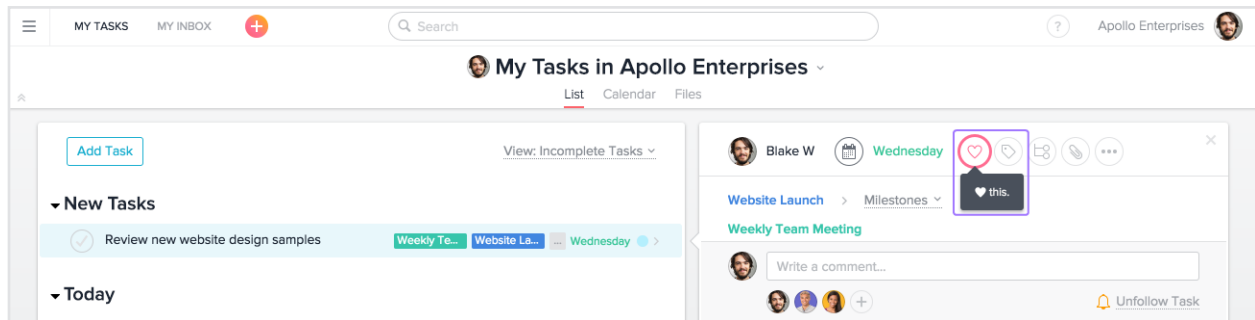
In the My Profile Settings menu, you can:

- Change your name and profile photo
- Adjust if and where you get email notifications and task reminders
- Determine which emails can send tasks to Asana and add additional emails to your Asana account
- Deactivate your account
- View apps you've authorized
- Change your Asana theme or activate hacks (see next section)

If you haven't already done so, you should update your first and last name, upload a profile photo, and add your role and department so that you're easily recognized.

## 10. Have fun with Asana!

Use a heart to express enthusiasm for a task, to offer agreement with someone's comment, or to express gratitude for a task completion. Simply click the heart icon wherever you see it—main pane, right pane, in your notifications, etc.



Check out some of Asana's experimental features by navigating to your Profile Settings and selecting the Hacks tab.

Customize your Asana display with backgrounds. Check out the available backgrounds by navigating to your Profile Settings and selecting the Display tab.

## Learn more

Thirsty for more Asana knowledge?

- Check out the [power user checklist](#) to learn how to use advanced features.
- Watch the [30-minute demo video](#) for a more thorough product tour.