

gtd[®]

ASANA[®]

Setup Guide

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FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to use Asana® for your personal GTD® workflow. This Guide will focus on configuring and populating Asana for your Projects lists and plans, Next Actions lists, Waiting For lists, and Reference.

This primary focus and purpose of this guide is to support your personal implementation. This is NOT a guide about how to use Asana with your team or how to make use of the many collaborative features in the tool.

If you are new to Asana, this Guide should be an excellent starting point for you to build a solid GTD foundation for optimizing your productivity. If you already have an established system in Asana, use this Guide as an opportunity to fine-tune or simplify, if you have found you've underused or overbuilt your setup.

We are aware that there are many features and ways to configure your system in Asana to support your GTD practice. This is not a technical Guide, nor will it cover all the features or ways to do something in Asana. We'll leave that to the Asana team to share with you through their excellent support material.

This Guide focuses on the methods we have found work well for GTD for a wide range of people. It's also important to note that no one tool will handle all of your needs for GTD, including Asana. Even with your lists managed in Asana, you'll still have your calendar and email in other tools.

Whatever configuration you choose in tools like Asana, be careful not to overcomplicate it to the point where you can only maintain it when you are at your peak of mental clarity. It's too easy to have a complicated system fall apart when you're not at your best. Your GTD tools should be complex enough to manage your workflow, but simple enough that if you were sick in bed with the flu, you could still easily maintain them.

Don't worry about using every available feature and add-on in Asana. There may be more offered than you will ever need. Focus on what makes a difference for you.

OK...let's get started!

Be careful not to overcomplicate your systems to the point where you can only maintain them when you are at your peak of mental clarity.

UNDERSTANDING THE GTD BEST PRACTICES

To get the most out of Asana as a tool for your GTD practice, let's review the fundamentals of the Getting Things Done® approach, so you understand how the methodology and tools will intersect.

WHAT IS GTD?

GTD is the shorthand brand for “Getting Things Done,” the groundbreaking work-life management system and bestselling book¹ by David Allen, which provides concrete solutions for transforming overwhelm and uncertainty into an integrated system of stress-free productivity.

GTD'S FIVE STEPS OF MASTERING WORKFLOW

- CAPTURE** Collect anything and everything that's grabbing your attention.
- CLARIFY** Define actionable things into concrete steps and successful outcomes.
- ORGANIZE** Sort information in the most streamlined way, in appropriate categories, based on how and when you need to access it.
- REFLECT** Step back to review and update your system regularly.
- ENGAGE** Make trusted choices about what to do in any given moment.

THREE STAGES TO INTEGRATING GTD

- 1. UNDERSTANDING** You understand the distinct differences in the five steps of Mastering Workflow. You understand a project versus a next action. You know how to transform what you've collected by asking the key processing questions, clarifying what something is, and what you want to do about it.
- 2. IMPLEMENTATION** You have installed at least the basic gear to support your GTD practice, including ubiquitous collection tools, functioning reference systems for your non-actionable information, and seamless buckets with “clean edges” for tracking your projects and next actions.
- 3. BEHAVIOR CHANGE** The five steps of Mastering Workflow are second nature to you. You have changed the way you think and work and are achieving stress-free productivity on a regular basis. When you “fall off” you know what to do to get “back on.”

This Guide will leap forward to the Implementation stage, by configuring Asana as an organizing tool for your projects, actions, and reference. Success at the Implementation stage depends on your understanding of GTD. If you are committed to GTD and experiencing stress-free productivity, don't shortchange yourself by skipping the “Understanding” stage.

¹ *Getting Things Done: The Art of Stress-Free Productivity*; Viking, New York; 2001, 2015 hardback or paperback. Available from booksellers everywhere.

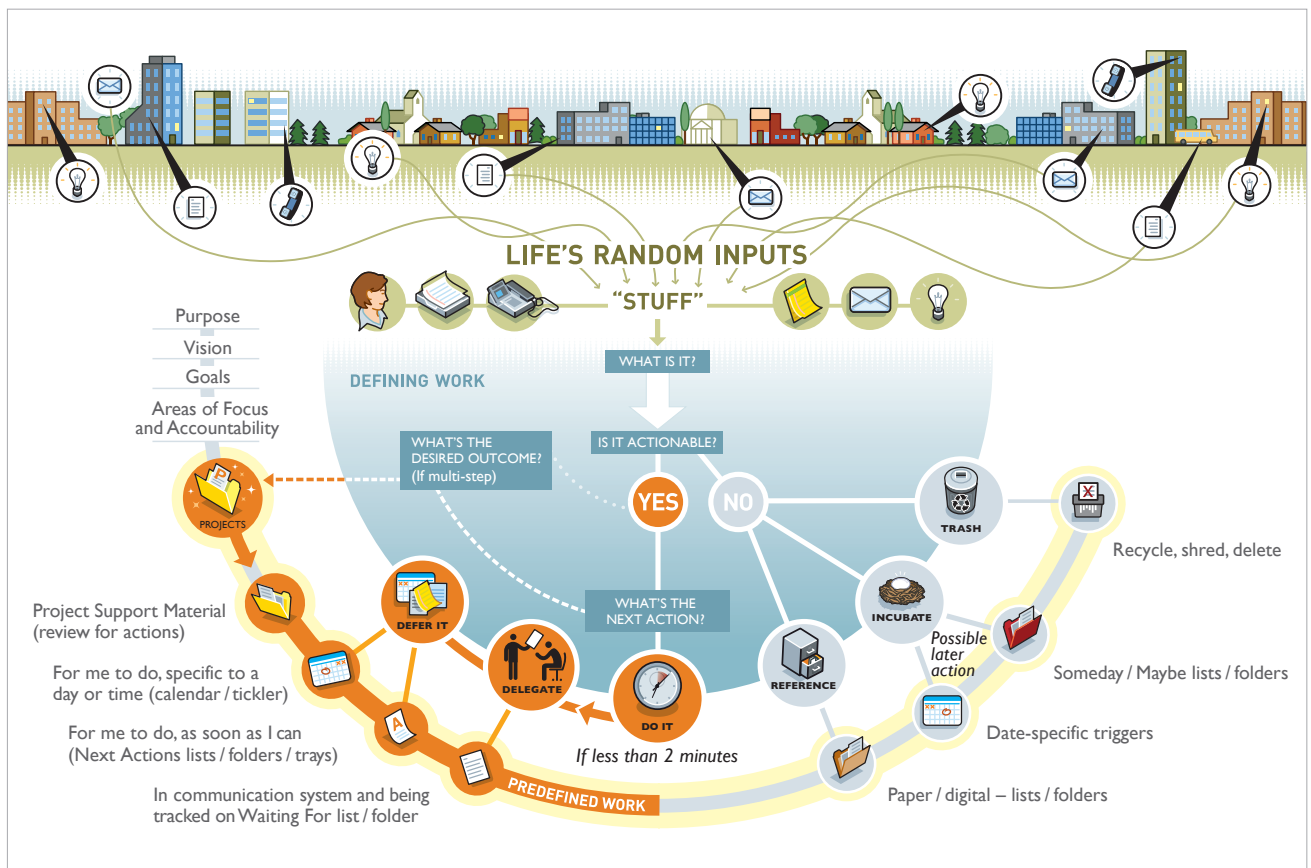
THERE ARE MANY WAYS TO GET A BASIC UNDERSTANDING OF GTD, INCLUDING:

Read or listen to the book *Getting Things Done* is the essential manual for this methodology (part one is an excellent overview of the whole game).

Take a course The courses offered by our global partners around the world are excellent primers for understanding the key steps of Mastering Workflow.

Practice, practice, practice The GTD Workflow Map (shown below) is a fantastic coaching tool for walking yourself through the core models for capturing, clarifying, organizing, reflecting, and engaging.

THE GTD WORKFLOW MAP



We recommend getting the full Workflow Map, with all of the GTD models, which comes as a PDF download. Visit our online store at gettingthingsdone.com/store to learn more.

THE GTD WEEKLY REVIEW[®] CHECKLIST

Any tool you use will take effort to keep clean and current so that you can trust your action choices. The Asana application is no exception. Rest assured, the Weekly Review² is what ties this whole thing together, ensuring that you have actions for all the active parts of your projects on a consistent basis, so you can trust that what you are choosing from your next action lists is current. The Weekly Review steps include:

GET CLEAR

Capture Loose Papers and Materials

Gather all accumulated business cards, receipts, and miscellaneous paper-based materials into your in-tray.

Get “IN” to Zero

Clarify completely all outstanding paper materials, journal and meeting notes, voicemails, dictation, and emails.

Empty Your Head

Put in writing and clarify any uncaptured new projects, action items, waiting for's, someday/maybe's, etc.

GET CURRENT

Review Next Actions Lists

Mark off completed actions. Review for reminders of further action steps to record.

Review Previous Calendar Data

Review past calendar in detail for remaining action items, reference data, etc., and transfer into the active system.

Review Upcoming Calendar

Review upcoming calendar events—long and short term. Capture actions triggered.

Review Waiting For List

Record appropriate actions for any needed follow-up. Check off received ones.

Review Project (and Larger Outcome) Lists

Evaluate status of projects, goals, and outcomes, one by one, ensuring at least one current action item on each. Browse through project plans, support material, and any other work-in-progress material to trigger new actions, completions, waiting for's, etc.

Review Any Relevant Checklists

Use as a trigger for any new actions.

GET CREATIVE

Review Someday/Maybe List

Review for any projects which may now have become active, and transfer to “Projects.” Delete items no longer of interest.

Be Creative & Courageous

Any new, wonderful, hare-brained, creative, thought-provoking, risk-taking ideas to add into your system???

² See the *Getting Things Done* book or our GTD Methodology Guides for a Weekly Review checklist.

APPLYING GTD TO ASANA®

PROJECTS AND NEXT ACTIONS

USING ASANA TO MANAGE YOUR LISTS

Asana is a great choice for managing the key lists in your GTD setup. You'll find it works well for your personal lists and those you need to share with others.

THE MOST COMMON GTD LISTS

The ten lists recommend in the *Getting Things Done* book that are a good starter set for most people are:

- | | |
|------------------|-------------|
| 1. Projects | 6. Calls |
| 2. Someday/Maybe | 7. Computer |
| 3. Waiting For | 8. Errands |
| 4. Agendas | 9. Home |
| 5. Anywhere | 10. Office |

1. Projects – A list of your multi-step outcomes that can be completed within one year.

2. Someday/Maybe – Potential projects and next actions you are committed to review as an option, but not committed to do.

3. Waiting For – Expected items waiting on someone or something else.

4.–10. Next Actions by context – The next physical, visible activity that progresses something toward completion. David Allen recommends 7 next action contexts to get started.

Sorting your next actions by context is recommended because when you are choosing what to do, context will always be your first limitation. For example, if you are the office, you don't want to be seeing (and having to take the time to skip over) actions that require you to be at home to do. Contexts should map to the people, places, and tools you need to get work done.

We'll describe each one of these lists in more detail later in the guide. For now, we just want you to understand the overall architecture and structure in Asana.

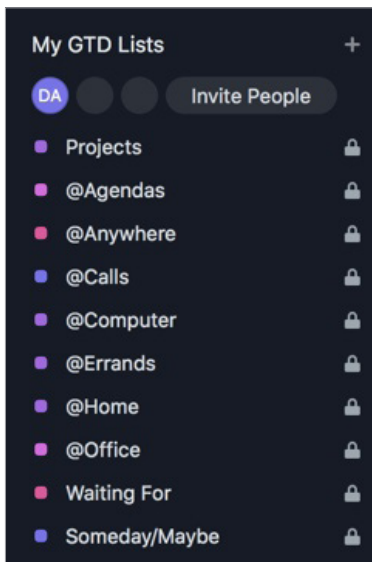
You can always go back to customize these later, after you've experimented, to discover what works best for you. We encourage you to give these lists some time, especially if the concept of sorting by contexts is new to you.

SETTING UP ASANA

While there are a number of ways you can setup Asana for GTD, we have found one way in particular that we think will work well for GTD. This approach will also support the collaborative aspects of Asana, which we know is important to many people. Summary of our recommendations:

- Create a new workspace for “My GTD Lists”
- Add 10 GTD lists as new, private, blank projects using the list layout (this is key to understand, as we are using the projects area for all lists—not for individual projects)
- Use tags, only as needed, to link key projects to related next actions
- Star all GTD lists to appear in favorites

ONCE SETUP, YOUR LISTS WILL LOOK LIKE THIS IN ASANA:

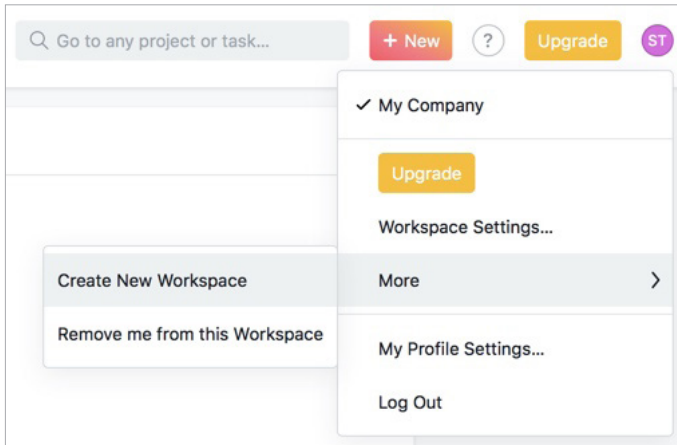


Don't worry yet about what will go on these lists. We will cover that extensively after this initial setup. For now, we recommend setting up these 10 lists to create the framework for GTD.

Note: *Later in the Guide, under Customizing Asana on page 20, we offer an alternative setup, which uses the projects area for all projects and tags for all contexts. If you want to consider both options, read ahead before setting up Asana, so that you know the differences.*

STEPS TO CREATE YOUR GTD LISTS:

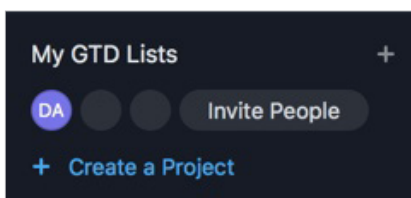
1. Click on your profile icon (your account) initials in the top right corner of Asana, More >, Create New Workspace.



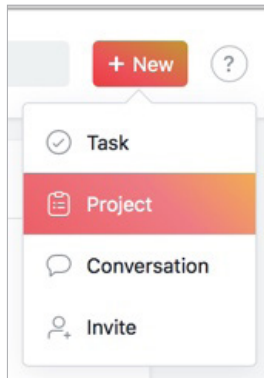
2. Name your workspace "My GTD Lists" (or whatever your preference to represent your GTD lists) and click Create Workspace.

A screenshot of the "Create Your Workspace" dialog box in Asana. The dialog has a title bar with "Create Your Workspace" and a close button (X). Inside, there are two input fields: "Workspace Name" with the text "My GTD Lists" and "Members" with the placeholder text "separate emails with commas". At the bottom right, there is a blue button labeled "Create Workspace".

3. Click the + sign to the right of your workspace name or click + Create a Project (which will disappear after you create your first list).



You can also choose the orange + New button in the top right corner of Asana and choose Project.



4. Choose Blank Project template.



5. Name your first list Projects, select the layout List, and change privacy to Private to me. Click Create project button when done.

Add project details

Project name

[Add a description](#)

Layout

List Organize your work in an itemized list.

Board Organize your work like sticky notes on a board.

Privacy

Public to My GTD Lists

Private to project members
[Upgrade to create private projects](#)

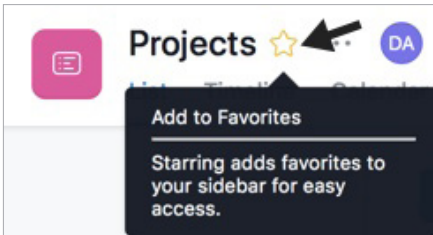
Private to me

[Create project](#)

Note: We recommend the List layout versus Board layout because we have found it to be the most user-friendly for getting items on and off your lists. It's also visually more expansive than the Board layout. But functionally for GTD, either will work.

Also, we recommend your GTD lists be set up as Private to me, to build the greatest trust in Asana being your total-life reminder system (many people will consciously or unconsciously resist adding personal items to a list if they don't trust the privacy of the information). If you have a specific need to share a list with colleagues, select one of the other privacy options (for example a "Projects-Work list, which we will talk about later in the guide).

6. The new Projects list will now appear in the main view of Asana. Click the star icon to make the list a favorite, for quick access in the future.



7. Repeat steps 3–6 to create the remaining GTD lists. We recommend adding an @ symbol before the seven next action contexts, to visually identify them in your list of lists.

@Agendas

@Anywhere

@Calls

@Computer

@Errands

@Home

@Office

Waiting For

Someday/Maybe

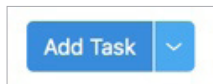
If you want to change the order of how they appear (they automatically sort based on when they were created), you can drag and drop each list to your desired location. We like Projects at the top of the list view, as they represent the big picture.

ADDING ITEMS TO YOUR GTD LISTS

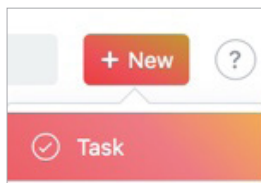
Items will be added to your lists as new Tasks. Like projects that we are designating as the format for all lists, you need to get creative in your thinking that tasks simply represent list items—not necessarily actual tasks.

List items can be added two ways:

- Click on the Add Task button within a list.



- Click on the orange New button and select Task.



Now that you know how we recommend setting up Asana, we'll now go into greater detail about what goes on these lists and options for customizing even further to match what works best for you.

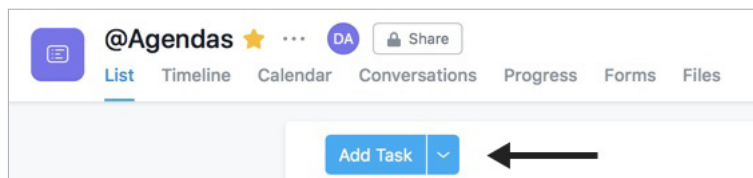
EXPLANATION OF THE COMMON GTD LISTS

AGENDAS This list tracks the topics and agenda items for people you interact with regularly. For example, if you have a standing meeting with a particular team, and want to capture agenda items to bring up at the next meeting, this is the place to capture them. The Agenda list is not for tracking next actions that you need to take related to that person or team (for example, a call you need to make to that person, which would instead go on your “Calls” list). Once you’re on the call, you may refer to the Agenda list for that person, but it’s the Calls list that is triggering the action to make the phone call, not Agendas.

THERE ARE 3 DIFFERENT WAYS TO SET UP AGENDAS:

Option One: Add each person or team as a list item under Agendas and use the description field to capture agenda topics.

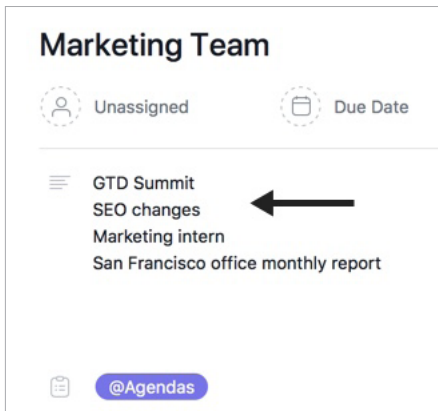
Click on the Agendas list from within your “My GTD Lists” workspace (not under Favorites, as the blue button will not appear if this is a new list) and click the blue Add Task button.



Then, enter the name of the person or group for which you want to create an agenda (e.g., Boss, Spouse, Marketing Team). For example:



To capture specific items for that Agenda list, add them to the Description box for the list item that appears in the right sidebar of Asana.



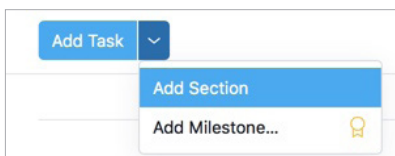
The entry will remain static, as long as you need agenda items for that person, whereas the Description field will be dynamic, as your agenda topics for them change.

You could easily have half a dozen people and meetings that you are tracking through Agenda lists—your direct reports, your boss, your assistant, your spouse, the weekly staff meeting, the monthly board meeting, etc.

Option Two: Add each person or team as a section header in the Agendas list and add agenda topics as tasks nested under the section.

With this option, you'll have a little more flexibility in how easily you can add new entries to that Agenda list, versus option one requiring you to go to Agendas list > Person/Meeting > Description field.

Click the drop-down arrow next to Add Task and choose Add Section.

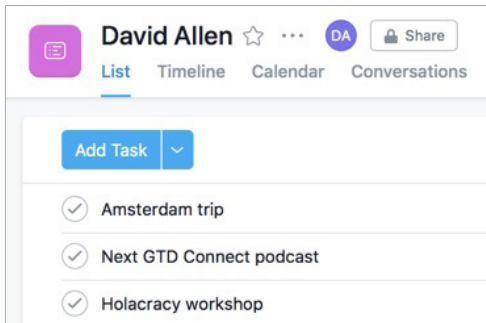


Add an Agenda name for the section (e.g., Marketing Team). Enter agenda items as tasks under that section header, not in the Description field, like in option one.

Sections can also be quickly created by using the keyboard shortcut Tab N, or add a colon symbol after the agenda name. For example: Marketing Team: and then press return.

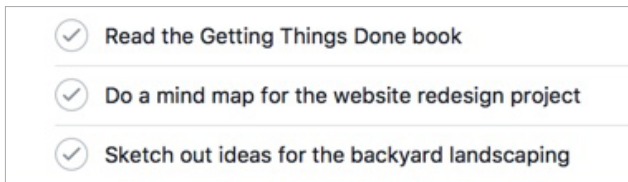
Marketing Team:
<input checked="" type="checkbox"/> GTD Summit
<input checked="" type="checkbox"/> SEO changes
<input checked="" type="checkbox"/> Marketing intern
<input checked="" type="checkbox"/> San Francisco office monthly report
Erika:
<input checked="" type="checkbox"/> Updating spreadsheet weekly
<input checked="" type="checkbox"/> Tax changes
<input checked="" type="checkbox"/> Contractor agreements
<input checked="" type="checkbox"/> Tracking vacation time

Option Three: Some people have so many items for just one person or team that they consider a third option of creating an entire list for that person, rather than park them in the Agendas list with other agenda topics. For example, if David were your boss and you often have a large volume of agenda items, you might create a list dedicated to David:

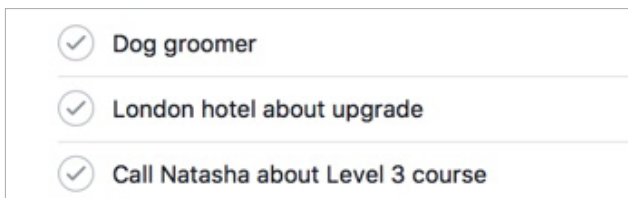


Play around with it to see which option works best for you. Just be careful that you don't create so many lists that it becomes difficult to find what you need and keep them current.

ANYWHERE An action that can be accomplished, without any restriction about where it's done, would go on this list. Notice in the example below that all the next actions on this list start with a verb. That is the recommended best practice for all of your next actions entries so that when it comes time to choose what to do, you've already done the thinking about what your action is.



CALLS Place reminders of calls you need to make on this list if they can be made from any phone. If a call requires a specific location instead (like home or office), we recommend putting the action in one of those lists instead. If the phone number is not already in your contacts, then add it to the title, so you're ready to go when you're available to make the call.



COMPUTER If the action requires a computer (e.g., emails to send, documents to edit or draft, spreadsheets to develop, websites to visit, data to review, etc.), add it to this list. This list then comes into play whenever you are at your computer(s) with any discretionary time. Even if you only have a computer in the office, it's still convenient to have this list separate from your Office list of things to do, because you wouldn't need to look at this list when you are looking for non-computer things to do. Many people these days also like to have a separate Computer list just for email next actions, given their volume.

- ✓ Email Luca re: Milan client
- ✓ Email John re: GTD Connect webinar on Asana
- ✓ Email David about workbook changes
- ✓ Buy tickets for summer concert series

ERRANDS This list is for next actions that have to be done when you are “out and about” (e.g., take something to the tailor, buy something at a store, etc.). If you are likely to think of more than one action to take at one of those locations (like the hardware store), you can make “Hardware store” the Subject and put your running list of things to get/do there in the Description field.

- ✓ Drop off dry cleaning
- ✓ Hardware Store
- ✓ Buy birthday card for grandma

Hardware Store

Unassigned
Due Date

☰ Nails
 Glue gun
 Garden hose

Or, create a section header for a frequent errand, as we described in Agendas, and add the items as tasks under that section.

- ✓ Drop off dry cleaning
- ✓ Buy birthday card for grandma
- Hardware Store:**
- ✓ Garden hose
- ✓ Nails
- ✓ Glue gun

If you travel quite a bit for work, you might consider having two errands lists—one for things you could do anywhere, in any city, and one for errands that need to be completed where you live.

HOME This list is for next actions that have to be done in your home environment (e.g., gather tax receipts, repair the cabinet door, organize old hard copy photos, etc.).

- ✓ Scan old photos
- ✓ Plant tomato garden
- ✓ Do touch up paint in guest bedroom

OFFICE These are the next actions that require you to be at your office, such as calls that you have to make from your desk because of the materials or equipment (like your laptop) you need for the call, purging old printed files, scanning documents on the office scanner, etc.

- ✓ Drop off forms to HR
- ✓ Clean out old training binders
- ✓ Get optical mouse checked by IT

WAITING FOR This list keeps track of all the actions, projects, and deliverables that you want to happen, but which are someone else's responsibility. It could be something you've ordered that hasn't come yet, something you've handed off to your assistant for which you're waiting on a response or something your boss is supposed to be finding out before you can move forward on a key project.

- ✓ David - Sign off on new bios - 5/22
- ✓ Susan - Call back about contracts - 5/13
- ✓ Frame store - order - 4/30
- ✓ Kevin - Get back to me about London meeting agenda - 5/5

We suggest adding the date you started waiting in the title of the item. This can be helpful when deciding when it's time to follow up or check the status.

The Waiting For list should be reviewed as necessary (at least once a week in the Weekly Review), triggering appropriate actions on your part to follow up, light a fire, or just check the status.

SOMEDAY/MAYBE These are the things you might want to do at some point in the future, but with no commitment to move on them at present. They could represent next actions or projects that were current at one time or not.

- Move 401k investments around
- Replace website host
- Learn Italian
- Clean off old laptop and donate
- Open new office in Dubai

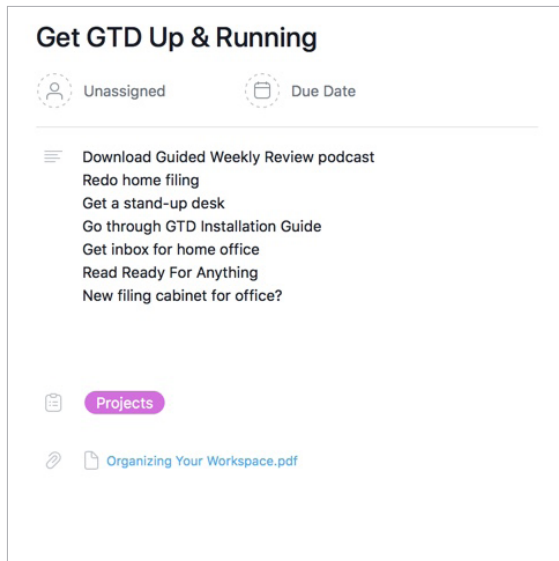
Many people find they triage things onto and off the Someday/Maybe list when their priorities shift. Your only commitment to items you put on the Someday/Maybe list is that you will review the choice regularly in your Weekly Reviews. That should give you the freedom to capture onto this list without the stress of feeling like you've made a commitment you may not have the resources to take on.

PROJECTS The Projects list tracks any of your desired outcomes that require more than one action step to complete, which you expect to be done over the next 12 months. Projects should always have a defined endpoint.

- Take trip to Tahiti
- Put on party for Dennis
- Complete taxes
- Get GTD Up & Running
- Hire new webmaster

Any notes you have about the project, also known as your project plans/project support, can be added to the Description field for each project on the list, as well as uploading relevant files. While this Description field may not be robust enough to capture all of your project details, and it may not make sense to transfer everything to this location (such as all of the emails also related to the project), it will be useful for quick bullet lists of notes, files, milestones, and “future” actions you want to capture. The current next actions and waiting for for the project are not tracked in this Description field but on those lists.

Example of project support included in the Description field of a project:



Remember, the recommendation is that project support in this description field, or the checklist section only hold future actions, project plans, notes, and support material. Current next actions on a project are instead tracked under the correct context list. When one of your future actions becomes current, you would copy it from project plans (if it was parked there) and move it to a current Next Actions list, Waiting For list, or your calendar.

If you have more project planning to do on the project or need to add more details to the project plans, add that as the next action on a context list (e.g., Computer, Office, Waiting For, etc.) now as well.

LINKING PROJECTS TO THEIR RELATED ACTIONS

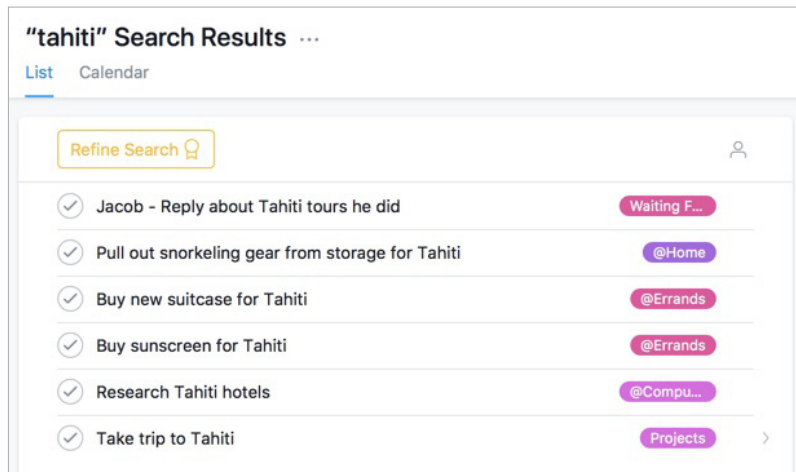
Sorting next actions by context, not by project, can initially seem awkward. Some people are used to having multiple files, piles, notepads, documents, and spreadsheets related to a project, with next actions for the project buried amongst all of that information. Next Actions lists don't replace project plans—we would just call that data "project support," and in our experience, it rarely works to have current next actions buried among project support for day-to-day action management.

Think of the last time you had 20 minutes free and decided to work on a key project. How easy was it to dig through your project support to find the immediate next actions based on the tools, people, and places available to you at the moment? You probably chose to avoid it and do something else, especially if you knew there was still thinking to do on next actions in the project materials.

When your next actions are already defined and sorted by context, you can move more quickly, more easily, and more in sync with how you are naturally choosing what to do first—by context. Then project support remains the parking lot for actions that are incubated for future action.

USING KEYWORD SEARCH

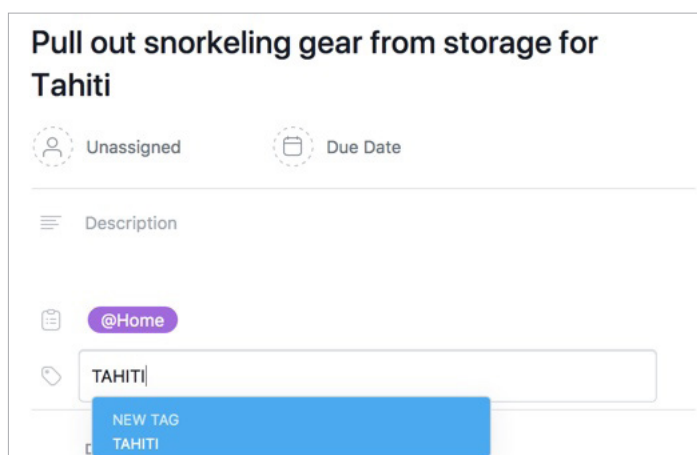
You can always add a keyword for the project in your next action or waiting for title. That way, you can rely on the powerful Asana search function to pull together related information. For example, if you wanted to pull together everything related to the “Tahiti” project, searching on that keyword will show you the results of all entries that include that word.



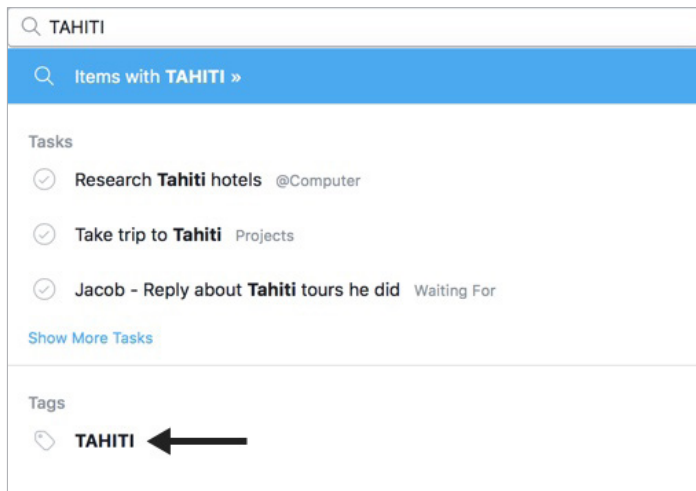
USING TAGS

You can also use tags for a specific project and search on that tag. For example, you could tag the project, and all of the related next action and waiting for items. Then, when you search on that tag, you can see everything related to the project in one quick view.

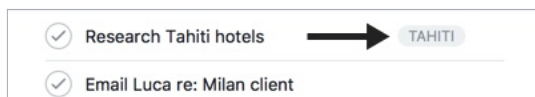
To add a tag to an entry, highlight the entry in your list and use the keyboard shortcut Tab T. Type your tag name, such as “TAHITI”.



To view all items related to a tag, use the search bar:



Or, click on the tag for an entry:



It is not possible to tag a list—only items on a list.

Be careful that whatever additional criteria you add for creating new entries, like creating and adding tags, do not become a burden or requirement. You may find tags useful for one project, but overkill for another. It's easy to let a feature like tags become unwieldy, so watch it carefully to ensure it's helping your productivity and not hindering it.

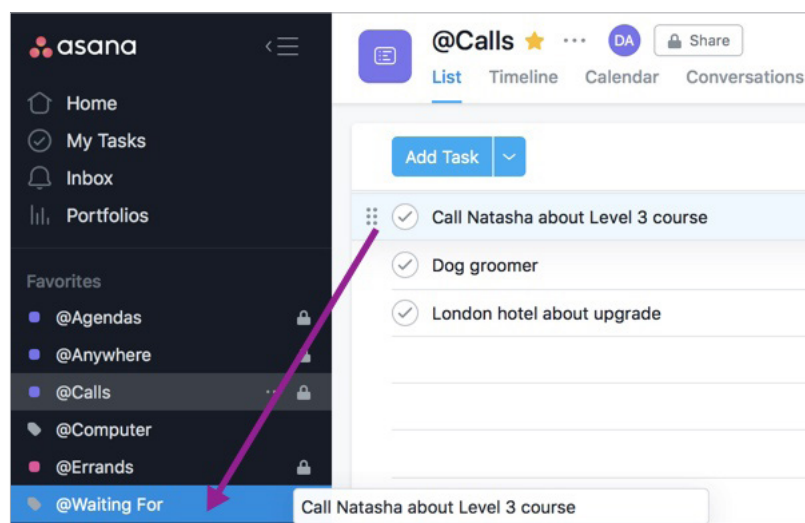
TYING IT ALL TOGETHER

Rest assured, the Weekly Review is what ties the whole thing together, ensuring that you have actions on all the active parts of your projects on a consistent basis, primarily based on those project support materials, so you can trust that what you are choosing from your Next Actions list is current. You'll find the Weekly Review checklist earlier in the Guide, as well as the *Getting Things Done* book, and in our Methodology Guides in our online store at gettingthingsdone.com/store.

MOVING ITEMS BETWEEN LISTS

When you are working your system, you'll be moving items between lists frequently. For example, you may have a next action in your Calls list to make a call. If you reach their voicemail but need to track that the person calls you back, that item would get reassigned to the Waiting For list. Or, you may have a project that has changed in priority and has become a someday/maybe, or vice versa.

To change the list assigned to an entry, simply drag it from one list and drop it in another. For example, to move a next action from the Calls list to the Waiting For list, drag it from the Calls list to the Waiting For list:



CUSTOMIZING ASANA

The lists and setup we have suggested should serve as a starting point. There are many ways to set up Asana for GTD, and no two setups will be the same. You may need more or fewer lists than we suggest. We write these Guides to offer a solid foundation to get you started, without overwhelming you with all of the possible options and scenarios. That said, here are some customizations to consider:

CONTEXTS

Some people find they want to break out Computer into more specific lists, such as which type of computer work, such as email-related next actions. Executive support staff can often use a context called Meetings to Schedule. Or, you may find you don't want to use as many contexts, and a simple list called Next Actions would suffice for your action lists.

PROJECTS

Some managers find a Projects-Delegated list useful as a high-level Waiting For list, or Projects-On Hold as a place to park projects that are not current but are not Someday/Maybe either. Also, if you have a large-scale project with many steps, and multiple people sharing the project, you may find it warrants its own board or list.

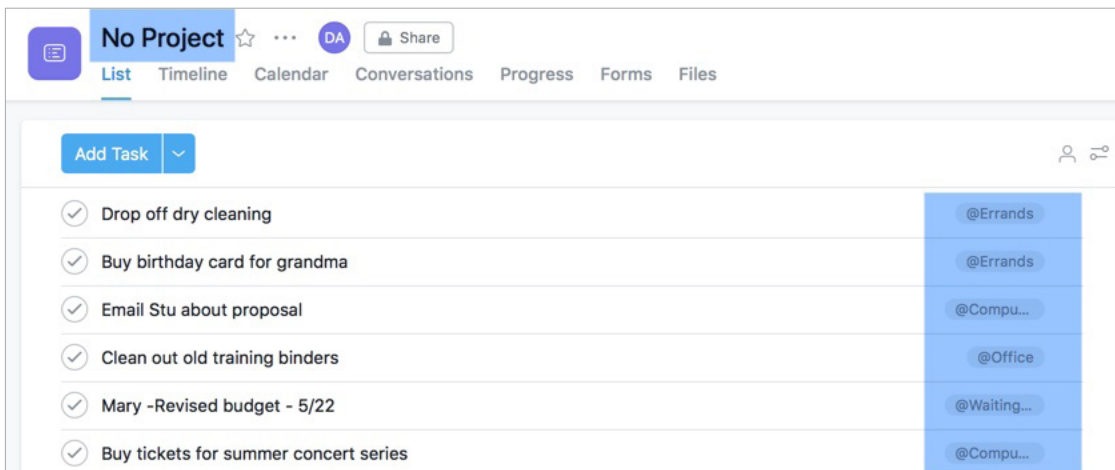
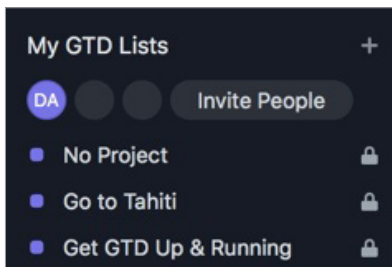
PERSONAL VS. PROFESSIONAL

And of course, you could create entirely separate workspaces for personal versus professional. That's up to you. David Allen does not make a distinction between the two in his book or his personal system. But some people do find it helpful to separate professional from personal, especially if they want to share lists with colleagues.

Be willing to experiment to find the set of lists that will work best for you. Just be careful not to overcomplicate your systems to the point where you can only maintain them when you are at your peak of mental clarity.

CONTEXTS AS TAGS

An entirely different option some users like in prefer when setting up Asana for GTD, different than what we've described so far, is to use the projects area for each individual project (instead of projects for all "lists" as we suggest) and create tags for each context list (@agendas, @anywhere, @calls, @computer, etc.). If you go for this method instead, you will need to create a "No Project" project to be able to capture contexts that are not related to a project.



The downside of this method is that most people have 30-100 projects, in our experience. Your left sidebar and potentially favorites view will be quite long to navigate. It also runs the risk of users reverting back to creating lists by project, instead of by context, which as we covered earlier is the suggested view for your next actions lists in Getting Things Done because context is the first limitation when you are choosing what to do.

Contexts as tags can also potentially get tricky with sharing tags with others in the same workspace. Changes others make to shared tags can change your key lists.

We stand by our recommendation to create all lists as projects, instead of projects as projects and contexts as tags, because we think it is the simplest and fastest way to set up and maintain Asana for GTD.

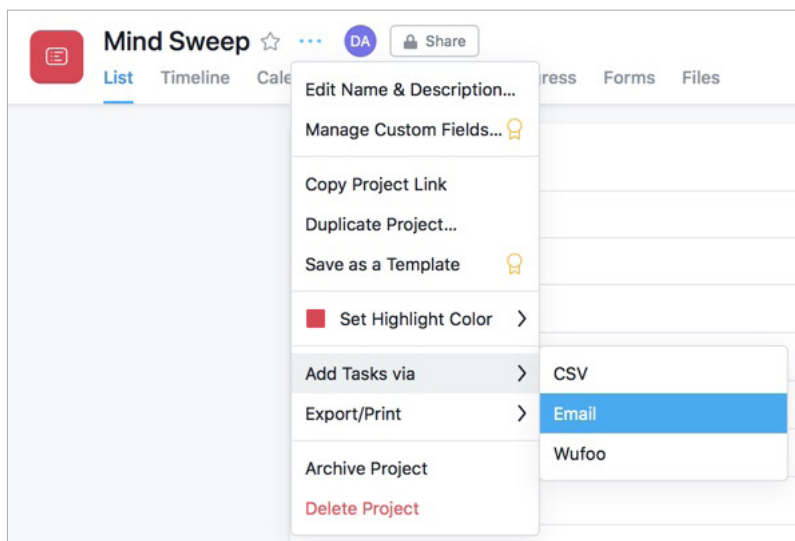
If you think this method will work better for you, by all means, give it a go. You can always change back to all lists as projects if you find it's not working well for you.

CREATING AN ASANA LIST FOR MIND SWEEP ITEMS

An Asana “Mind Sweep” list can be used to hold items that still need to be processed. For example, you may have a thought or idea on the fly while you are in email, not know exactly what the next action is yet, but you don’t want to lose the idea. Adding items to the Inbox stores the idea until you are ready to clarify it (through the questions on the GTD Workflow Map shown on page 3 of this Guide) to decide what it means and what you want to do about it.

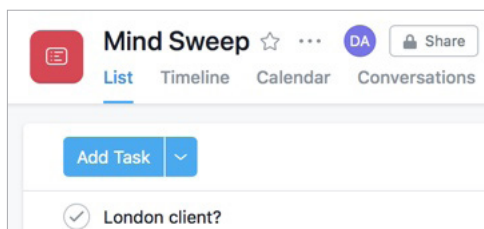
Create a new list called “Mind Sweep” within your My GTD Lists workspace.

Click on the ellipsis to the right of the list name > Add Tasks via > Email.



Copy the email address and add it to your email address book. Send a test email now, with a Mind Sweep item in the subject line. For example, you know you want to do something about the client in London, but you’re not sure what yet. Send it to your Asana Mind Sweep list to be clarified and organized later. Here is how the email will be dispatched in Asana:

- The subject will be the task name
- The body will be the task description
- All email attachments will be attached to the task
- You can cc: teammates to add them as task followers

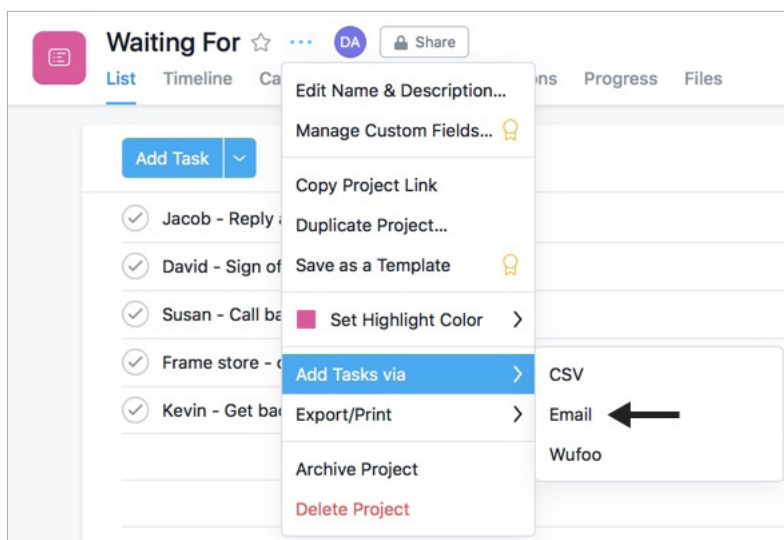


The difference with the Inbox versus your other lists is that these items are unprocessed. You still have not clarified yet what the item is or what you want to do about it. To make the Inbox work, you'll need to treat items you create there with the same rigor you would your email inbox and paper in-tray, meaning, clarify the items in this list down to zero on a regular basis.

OTHER USES FOR EMAILING TO LISTS

When you've already clarified the item and just need to get the item organized on a list, the Add Tasks via Email feature can be used for your other lists as well.

Each Asana list has a unique email address. For example, if you wanted to email to your Waiting For list, find the unique email address for that list like you did for the Mind Sweep list (... > Add Tasks via > Email).



All items sent to the email address for the Waiting For board will appear as new items on that list.

ASANA APPS

Asana and their partners offer a number of useful add ons that make it even easier to add items to your Asana lists, including Outlook[®], Gmail[®], Chrome[®], Google Calendar[®], and many more.

[Scan the App Directory](#) for ones that will work for your workflow tools.

REVIEWING YOUR LISTS

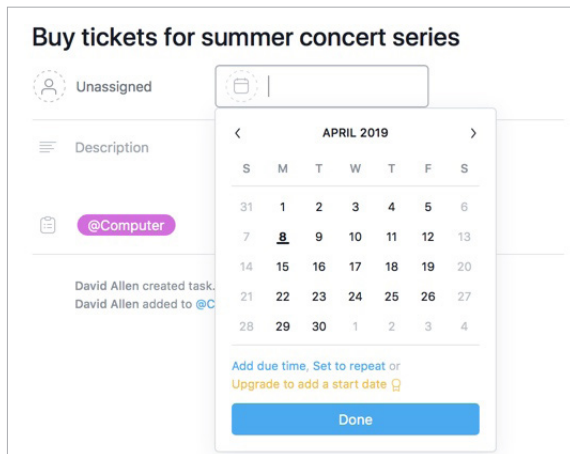
On a daily basis, we recommend reviewing your Next Actions lists (the ones we set up as contexts, such as Calls, Computer, etc.), when appropriate. On a weekly basis, in your Weekly Review, we recommend reviewing your calendar and all of your actionable lists in Asana; including Projects, Next Actions, Waiting For, and Someday/Maybe lists.

This will be valuable time spent to acknowledge what you've completed, capture any new next actions, and ensure each project is moving forward.

USING DUE DATES

We recommend using due dates judiciously. A quick way to erode trust in your system is to create a pattern of false due dates, where you are continually questioning what's a “real” versus “made up” due date, as well as spending your valuable time changing dates on overdue items you thought you would get to.

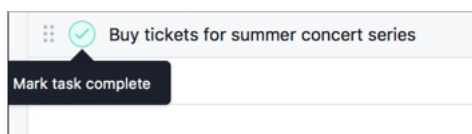
Due dates can be added to any list item by clicking on the item and selecting “due date” from the expanded menu.



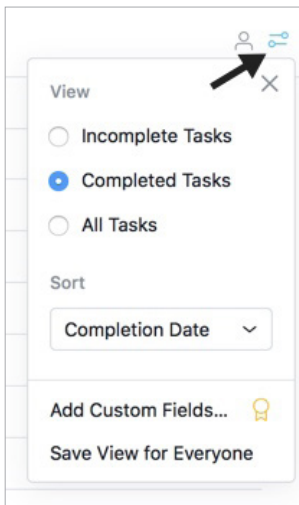
MARKING ITEMS COMPLETE

Many GTD users ask if they should keep or delete completed items from their lists. If you think you'll ever want to retrieve the item, we recommend keeping it. This can be useful for year-end reviews when you want to see and acknowledge all of the projects you completed. You may find this unnecessary though for all of the next actions. Trust that you know best about what would be useful for you to keep. As David Allen says, “When in doubt, keep it. When in doubt, throw it out!” The bottom line is that either works if you are making a choice that works for you.

To mark an item complete in Asana, click the checkmark to the left of the item.



To view completed items for a specific list, click on the Change View icon to the right of the list view and changed to Completed Tasks.



SHARING IN ASANA

Although the focus of this guide is on your personal GTD implementation, Asana is well known for its collaboration features.


If you are using Asana's sharing features, you may find it necessary to further customize your GTD setup and lists to narrow down what information others see (e.g., creating a list for work projects only or a workspace just one large-scale shared project, so your colleagues do not see your personal projects.)

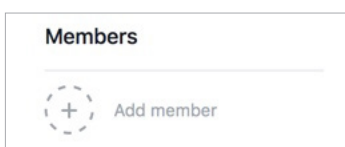
Sharing is complex, so be sure you understand the nuances before making workspaces, lists, and items open to others. [Read this Asana support doc](#) to get a better understanding of the scenarios for sharing. We'll talk about a few scenarios that relate to GTD.

SHARE A LIST

For example, if you want to share just your @Boss Agenda list with your boss before your next one-on-one, but not all of your other lists, you have two options:

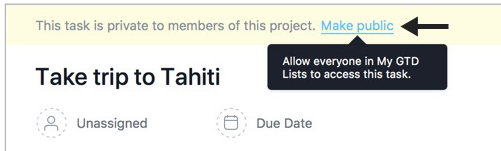
1. Keep the list Projects private within the My GTD Lists workspace, but give your boss access to just that list. Giving access to a single private list is an Asana Premium feature.
2. Make the list public to the My GTD Lists workspace, and add your boss to the workspace to give them access to any public lists or items in the workspace. This works for Asana Premium or Free users.

You'll find options for sharing lists under the Share button  next to the list name. To add someone to a workspace, click on the workspace name in the left sidebar, and select Add Members in the main window.



SHARE A LIST ITEM

You can also share specific items on the list. For example, to share a personal project with your spouse, make the project public to your workspace and add them as a workspace member.



All that said, please consider why you think you need to share and what you are sharing before leaping to open your lists up. Is it to report out? To collaborate? How is that working? Is Asana the best method for that? It's easy to assume sharing automatically means effectively collaborating when it may not at all be serving that purpose. Not to say it can't, and Asana is a better tool than most for facilitating that, but it's good to challenge how you are using sharing features and consider whether it is improving workflow or just increasing it?

We've also seen with many clients that as soon as their personal lists are shared, the trust factor goes down significantly as a total-life reminder system. Consider what works best for you to create a seamless trusted system so that your mind can let go.

USING SHORTCUT KEYS

The ability to capture information and facilitate tasks quickly, through shortcut keys, can greatly enhance your productivity. Asana offers many shortcut keys for common functions in the app. Here is a short list of the most common ones:

- Quick add task Tab Q
- Set due date Tab D
- Set tag Tab T
- Assign task to list Tab P
- Jump to Home Tab H
- Search Tab /

You'll find a [full list of Asana shortcuts on their website](#) through **⌘** / on Mac, or **Ctrl** / on Windows.

SYNCING

Syncing Asana to your iPhone or Android device should be seamless. The user interface will be different, but your data will be the same and having access to your lists on the go is a great way to take advantage of weird windows of time to move forward on actions and projects.

EMAIL

INTEGRATING ACTIONABLE EMAIL WITH ASANA

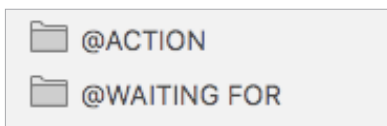
The master key to managing email is the most difficult habit for many to change—working from a regularly empty inbox.

It takes less mental effort to operate from a zero base than to leave anything sitting in the inbox. That doesn't mean that the inbox in email is kept at zero—just that it gets there on some regular basis. The problem is that most people do not have a system for managing their emails beyond the inbox area, so if they can't move on or finish dealing with the email right then, they will leave it in “In” as the safest place.

TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL

OPTION ONE: USE THE EMAIL AS THE REMINDER

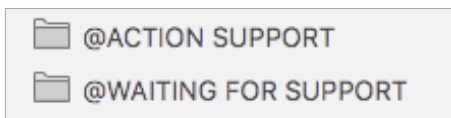
Create @Action and @Waiting For folders in your email program and use them as an action list. You would not also put those reminders on your calendar, or Next Actions or Waiting For lists in Asana—the email itself would be the only reminder. That means you need to scan these folders with as much discipline as you would your lists and calendar, for reminders of your commitments. The @ symbol is a trick to push these folders to the top of your email structure for easy access. If the @ symbol does not work in your email program, try another symbol.



People often like this option for the quick win it gives in getting your inbox processed to zero. The downside with this option in email is that you have no place to capture the next action or due date that's associated with that actionable email. So you'll inevitably be doing some “re-deciding” about emails you've already processed if the next action is not apparent in the subject line.

OPTION TWO: USE LISTS IN ASANA OR YOUR CALENDAR AS THE ACTION REMINDER

Create @Action Support and @Waiting For Support folders in your email program to hold supporting information for actions that are tracked on your calendar, Next Actions, or Waiting For lists. In this case, the folders only serve as storage buckets to hold the information you need to take the action on. You would be reminded of the action when you review your calendar, Next Actions, or Waiting For lists. It's one less place to look for actions or waiting for items, whereas the first option adds an additional location to look for a complete view of your reminders.



People often like this second option because all of your reminders will be tracked in as few places as possible.

Go ahead and create either the @Action and @Waiting For or @Action Support and @Waiting For Support folders in your email program now.

GETTING YOUR INBOX TO ZERO

Getting your inbox to zero means you have decided about what each email means and what you want to do about it. Using the questions from the GTD Workflow Map (pictured earlier in the Guide), you would simply ask:

WHAT IS IT?

IS IT ACTIONABLE?

NO Is it trash, to file as reference, or to incubate (add to your Someday/Maybe list, calendar, Tickler/Bring Forward file³)?

YES What's the next action?

Do now, delegate to someone else, or defer to do myself later?

Do it now If it takes less than 2 minutes, handle it in the moment.

Delegate it If you need to track this getting completed, track the waiting for reminder in your @Waiting For folder in email or Waiting For list in Asana.

Defer it If you need to do it later, track the action reminder in @Action folder in email, Calendar, or on a Next Actions list in Asana.

If multiple actions, what's your desired outcome?

Track that outcome on your Projects list in Asana.

We recommend getting your inboxes to zero daily, or at least once a week in your Weekly Reviews.

³ For more information on using a Tickler/Bring Forward file, see the *Getting Things Done* book.

CALENDAR

WHAT BELONGS ON YOUR CALENDAR

Outside of Asana, your calendar is a critical component in your system for reflecting the action choices that need to be done ON a specific day versus those that you see on your Next Actions lists in Asana, which can be done on ANY day, or BY a specific day. Your daily calendar page should represent the “hard landscape” for your day and will provide a trusted foundation at a glance for moment-to-moment orientation about “what’s next?”

THERE ARE ONLY THREE THINGS THAT BELONG ON YOUR CALENDAR:

1. Time-specific actions Things that need to happen on a specific day and time.

Examples:

- Meetings, appointments, time blocked to work on projects

2. Day-specific actions Things that need to happen during the day, but not at a specific time.

Examples:

- A call you have to make before you leave for the day
- Something that you have to finish and submit by the end of the day
- An agenda you must cover with someone before they leave the office

3. Day-specific information This is information you want to know or be reminded of that day—not necessarily something to do.

Examples:

- Things that might disrupt your day (server shut-downs, office moves, etc.).
- External events to be aware of (marathons, elections, heads of state visits, etc.).
- Activities related to other significant people of interest to you (kids, spouses, bosses, assistants, vacations, etc.).

Here is a calendar showing all three types of entries:

	FYI: David in Tokyo 3
	Morten's Birthday
	Send updated spreadsheet to Jose 2
	Submit expense report
GMT-07	
	Update meeting with Luca 1 10am – 1pm
11am	
12pm	
1pm	
2pm	Marketing Team meeting 2 – 3pm
3pm	

REVIEWING YOUR CALENDAR

On a daily basis, we recommend reviewing your calendar for time-specific and day-specific actions, any chance you get. On a weekly basis, in your Weekly Review, we recommend reviewing your calendar backward for any “Oh, that reminds me...” items, and forward for any “I need to start prepping for...” items to capture.

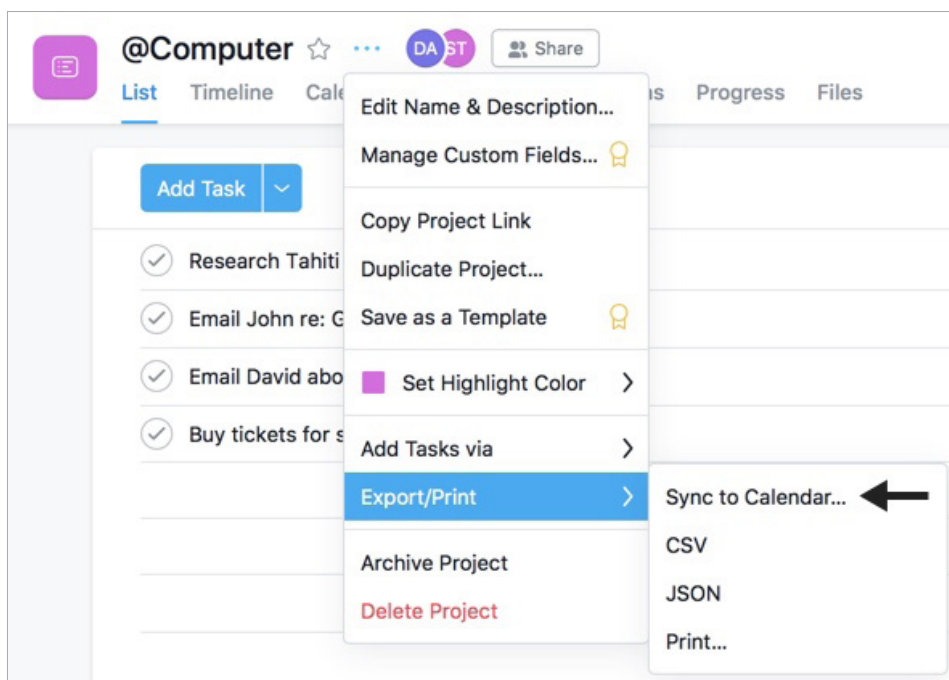
INTEGRATING ASANA INTO YOUR CALENDAR

Asana makes it possible to feed your Asana items with due dates into your calendar. This is available for Google Calendar, Outlook, Apple Calendar, or any calendar you can subscribe to by URL. This can be useful to have an extra safety net to be sure you don't miss date items.

To add this integration, you'll need to configure this for each list you want to appear in your calendar.

For example, if you want to feed one of your next actions lists into your Google Calendar, here's what to do:

1. Go to the list.
2. Click on the ellipses next to the list name > Export/Print > Sync to Calendar.



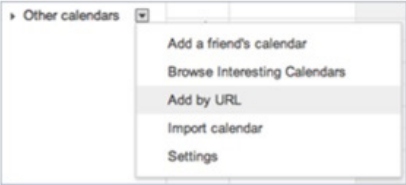
3. Copy the URL and add it as a new calendar in Google.

Sync tasks with due dates to calendar

GOOGLE CALENDAR ICAL, OUTLOOK OR OTHER CALENDAR

`1=2ac3bace7f3bda77fe4683b6e1b7d77d40cdc30dcac`

Go to Google Calendar and in the bottom left, find *Other calendars*. Select **Add by URL** from the menu and copy and paste the address provided above.



- Includes only incomplete tasks with due dates.
- The initial sync to your calendar should be instant, but updates to due dates in Asana may take a while to reach your calendar—sometimes up to a day.
- Note: anyone with this link has access to your tasks, so be careful how you share it.

[Learn more from our Asana Guide article.](#)

Repeat these steps for each list you to want to integrate into your calendar.

REFERENCE

USING ASANA TO STORE REFERENCE INFORMATION

Asana can manage an unlimited number of potentially useful (and fun!) non-actionable simple reference lists and checklists. This functionality is open-ended and in one sense, so simple the possibilities are infinite.

Have you ever...

- had a wild idea you didn't know what to do with?
- wanted to remember the great restaurant you ate at in London?
- needed to remember all the things to check before you leave on a trip?
- read something inspirational you wanted to keep and re-read every once in a while?
- wondered where to put a suggestion about something to do the next time you visit a country?
- needed to remember everything you need to handle when you put on a special kind of event?
- wanted to keep track of all the articles, blog posts, or essays you might want to write?
- wanted to have a list of clients and prospects to review occasionally?
- wanted a place to keep track of the possible gifts to give special people in your life?
- needed a place to capture great team building and staff recognition ideas?
- needed a quick emergency contact list?

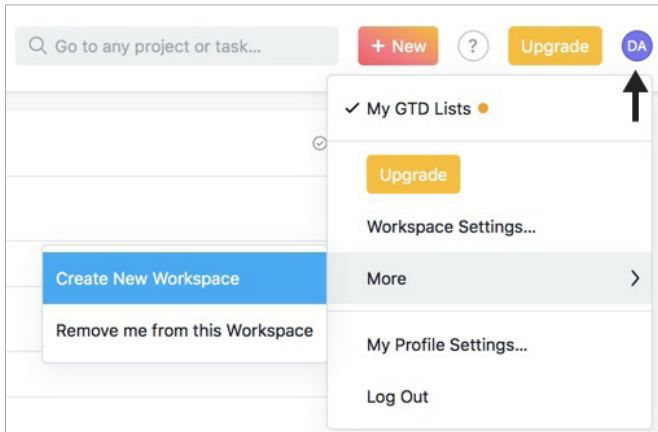
Here are some possible new reference lists to try:

- Checklists (e.g., Weekly Review, Packing, Home Maintenance)
- Areas of focus
- Higher Horizons of Focus⁴
- Fun
- Ideas
- Inspirations and affirmations
- Great quotes
- Lists
- Might like to buy
- Might like to read
- Music to download
- Next time in...
- Travel
- Vacation ideas

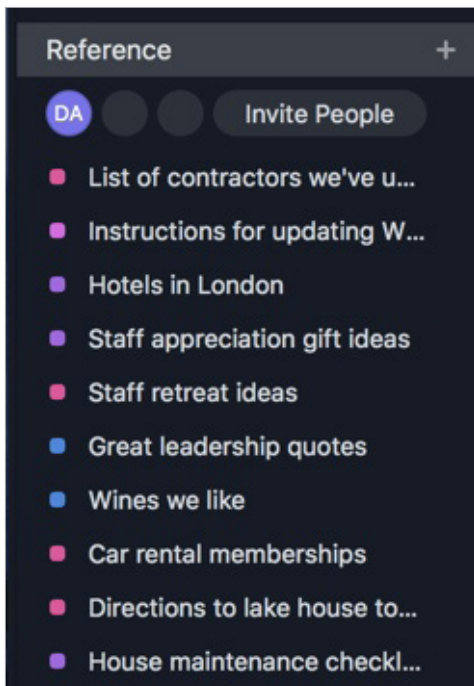
⁴ See David Allen's *Getting Things Done* or *Making It All Work* books for more information on Horizons of Focus.

You have a few options for how to set this up in Asana. As we consistently suggest, be careful to not overcomplicate your system to the point where it becomes unwieldy to find or maintain the information.

For both of these examples, start by creating a new workspace called Reference. The following examples will show options within that new workspace. To create a new workspace, click on your initials in the top-right sidebar > More > Create New Workspace.



Example One Create individual reference lists within the Reference workspace.



With this option, you could have dozens, if not hundreds of items of various topics. Unfortunately, you can't tag lists—only items on a list—so this option may get unwieldy if you have many lists.

Example Two Create multiple reference lists within topic-focused boards. Instead of List layout, choose Board, which will allow multiple lists within one view.

Add project details

Project name

[Add a description](#)

Layout

List Organize your work in an itemized list.

Board Organize your work like sticky notes on a board.

Create each list as a column within the board.

Travel ☆ ... DA Share

Board Timeline Calendar Forms Conversations Progress Files

Show Project Description All tasks ▾

Packing checklist

+

umbrella

charging cable

Hotels in Florence

+

Hotel Florence

Viva Vitz!

Car rental memberships

+

Zippy rental - Fhjj76786766

RentWheels - AF566555

Safari tour operators

+

African Moons

Amazing Safaris

You might also find it useful to set up a designated workspace or board for storing support and plans for a particular project. For example, if you have a large project you are collaborating with others on, it might be useful to be able to gather research and project support in a shared space with controlled access.

Website redesign ☆ ... DA Share

Board Timeline Calendar Forms Conversations Progress Files

Show Project Description

Meeting notes

+

Milestones

+

SEO research

+

The possibilities with storing reference are endless. Just remember to keep it clean and current, and fast and fun.

CONCLUSION

ADDITIONAL RESOURCES

We hope this instruction guide has been useful. It is intended as a supplement to our core education of workflow mastery developed over many years—not a substitute. The most successful implementation of this guide builds on the understanding of the GTD best practices presented in our many learning tools, including the *Getting Things Done* book, the courses and individual coaching offered by our global partners, and our online learning center GTD Connect®.

Please visit our website to take advantage of the many support tools and training available to assist you in getting your GTD system up and running.

FOR TECHNICAL SUPPORT WITH ASANA, PLEASE VISIT:

[Asana.com](https://asana.com)

FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com

gtdconnect.com