

## IARC Asana Implementation - Frequently Asked Questions

*Do I have to fill out the IARC Support Services Request form?*

**Yes**, we are utilizing this form as a means of streamlining business processes in IARC and ensuring efficient and effective customer service. Here is a short [video walkthrough](#) of how to use the new form, which will be used for all of the following request types:

- ☒ Fiscal & grant management
- ☒ Procurement & purchasing
- ☒ Operations & safety
- ☒ Room reservations, travel & event support

*There used to be a Purchase Request form, how do I request purchases now?*

To request help with a purchase request, **please select Procurement & Purchasing** → then scroll through the task types (Catering Request, Employee Reimbursement, Fellowship Request, General Purchase Request, Honorarium Request, Pro Card / Travel Card Application, Contract Setup, Subaward Request, or Other). Selecting this task type will ensure that we gather all the necessary information we need to complete the request in a timely manner.

The task type you will use most often is likely to be General Purchase Request, which is how you request assistance with a purchase (lab supplies, technology, etc) that doesn't fit into any of the other categories outlined.

*What happens when I fill out this form?*

When you fill out this form, it creates a task in our internal workflow that you are automatically added to as a “collaborator.” If another individual should be added as a collaborator, please let us know in the comment section of the task.

*How can I see my requests?*

The best way to view your requests (tasks in Asana) is **through your Asana “Inbox”** located on the top left-hand side of your screen. You will see a running list of updates about the tasks you are connected to there. Alternatively, **as a PI you can navigate to your PI Portfolio. The “Dashboard” view** is the easiest place to locate the requests you have submitted through the form.

To learn how to navigate your Asana Inbox and other personal task management areas of the platform, [attend this online training](#).

*How do I check on the status of my request?*

**We utilize the IARC Task Status field** to communicate where we are in the process of completing the task. Please see [this document](#) for a more detailed breakdown of the task status definitions and uses.

*How are approvals being handled in Asana?*

If approvals are needed, particularly with Procurement & Purchasing related requests, **we will assign the approval to the appropriate person in Asana in the form of a “Subtask;”** the title will look something like this: *PI Approval for [PR 26## - Amazon - Victoria Smith]*. You will complete the subtask by clicking approve at the top of the card. Please review [this video](#) or [this step by step guide](#) for more detail.

*What is the function of the PI Portfolio in Asana?*

In addition to task request information, the **PI Portfolio also contains important data about each of your grants in one central location**, including the start and end dates, the funding agency, the indirect rate and more—all of which is easily accessible in the “List” view.

*Is there a direct link between Asana and Banner?*

**No**, there is no application programming interface (API) between Asana and Banner. Information is added manually by the Support Services team to provide a functional space for PI grant and task management.

*What if I need help understanding how to navigate Asana?*

- Asana Trainings: Sign up for the Asana-led [Getting started with Asana](#) and [Personal productivity in Asana](#) training which are taught live and can be scheduled at your convenience
- 1:1 Trainings: Sign up for [individual trainings](#) with Victoria to learn more about the new Asana workflow and how to utilize the platform
- Walkthrough Videos: Coming soon, more walkthrough videos of the PI Portfolios & Dashboards

Points of Contact:

Asana Support

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