

# Submitting to the FSC & A Guide to Asana:

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## Using Asana to Track and Respond to Your Requests

*When you submit a form to the CEAS Financial Service Center through our website, it automatically creates a task in our system. We use the domain Asana for:*

- *Managing workflow while archiving documentation*
- *Communicating with you about your request.*
- *Reviewing past requests if questions arise / historical reference*
- *Data analysis, reporting and trend monitoring*
- *Recurring issues / process improvements*

Below is what to expect and how to respond:

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## What Happens After You Submit a Form

1. You submit a form on our website. [CEAS Financial Service Center \(CEAS FSC\)](#)

2. After submission, confirmation is sent directly to your email that form was received successfully. If desired, this email can be archived for submission tracking purposes.
  3. An FSC coordinator may add you to the related task in Asana so we can:
    - Ask follow-up questions
    - Share updates
    - Notify you when the request is complete
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## Do You Need an Asana Account?

No, you do not need an Asana account to communicate with us.

You can reply directly from your email inbox.

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## How to Respond to FSC Messages

### Option A: Reply by Email

1. Open the email notification from Asana.
2. Click "Reply."
3. Type your response.
4. Click "Send."

### Option B: Respond in Asana

If you prefer to use Asana directly:

1. Click "View Task" in the email.
2. Log in (or create a free [Asana account](#)).
3. Type your message in the comment field for the related task.
4. Click "Comment."

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## Understanding Asana Email Notifications

You may receive notifications when:

- You are added/invited to a task
- Someone comments on the task
- The task is marked complete
- You are @ mentioned in a comment

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## How to Reduce or Manage Notifications

If you **do not** have an Asana account:

- You can mute a specific task by clicking “Unfollow” at the bottom of the email.
- Or let us know and we can remove you from the task once your portion is complete.

If you **do** have an Asana account:

1. Log into Asana.
2. Click your profile photo (top right).
3. Go to **My Settings**.
4. Click **Notifications**.
5. Suggested email notifications are as follows:

# Settings



Profile

**Notifications**

Email Forwarding

Account

Display

Apps

Hacks



## Email notifications



### Updates on your work

- When work is shared with you
- When work is assigned to you
- When due date changes on work assigned to you
- When work assigned to you is completed
- When your work is blocked or unblocked
- When someone likes or reacts to your work
- When someone requests access to your work

### Communication

- Someone mentions @ [redacted]
- When comments or attachments are sent
- When appreciation stickers are sent
- When status updates are posted
- When messages are sent

### Updates to work you collaborate on

- When you're added as a collaborator
- When work details (such as custom fields) change
- When work is completed
- When work is added to a portfolio
- When tasks are added to a project

**Summaries**

- Daily tasks assigned to you
- Weekly overdue tasks
- Weekly portfolio updates
- Recommended project and portfolio smart summaries from Asana AI

**Other**

- Reminders to finish drafted comments
- Reminders to follow up on comments to you
- Updates about users you've invited
- Tips to get more out of Asana

Another way to manage notifications is to set up a 'rule' that automatically moves all of the Asana emails into an Outlook folder, then you can check that folder periodically:

Set up a new folder in Outlook for Asana messages. To set up an Outlook folder, right click on:

1. Your Inbox
2. Click New Folder.
3. Click on an Asana email
4. Click on the Rules dropdown box.

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## Not Receiving Asana Email Notifications?

*If you were told you were added to a task but did not receive an email notification, please review the following options/steps as automated notifications are sometimes incorrectly filtered:*

**Step 1:** Check Your Spam or Junk Folder

- Search your inbox for: “Asana” or the task name.

## **Step 2: Check That You’re Using the Correct Email Address**

- We add you using the email address submitted on the form.
- If you submitted the form with a different email (shared mailbox or alternate address), notifications will go there

## **Step 3: Confirm With FSC That You Were Added**

- An email address may have been mistyped
- You may have been added as a collaborator but later removed
- The task may not yet have a comment (consistent notifications normally trigger when there is activity)

## **Step 4: If You Have an Asana Account**

If you already have an Asana account and still are not receiving emails, you may have notifications turned off in your settings:

1. Log into Asana.
2. Click your profile photo (top right).
3. Go to **My Settings**.
4. Click **Notifications**.
5. Ensure email notifications are enabled as previously suggested in the screenshots above:
  - Task activity
  - Mentions
  - Status updates (optional)

## **Step 5: Ask IT to allow Asana Emails**

If emails continue not to come through, CU’s email security system may be blocking automated messages for you.

Submit a request with OIT on the [ServiceNow portal](#) to allow emails from:

- @asana.com
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## When Your Request Is Complete

- You should receive a notification when the task is marked complete!
- No further action is required unless you have follow-up questions.