

InformedK12 Instructions Guide

Searching for Documents (Account-Holders)

All forms submitted on InformedK12 are securely saved on a cloud server indefinitely. You may view any pending or completed forms (that you have access to) within the **Search** page. Viewing access is determined by forms routed to you for review/approval as well as any submissions in which the department selected on the form matches your department access. For example, if the department on any given form is selected as "Financial Aid," any account-holder with access to view Financial Aid submissions will see that form when searching.

1. 

2. 


3. 

4. Type your search criteria in the search field. You may search by the name of the person the document is waiting on, the name of the initiator, or any of the field categories listed under the search box.



	LAST ACTIVITY	STATUS	WAITING ON	INITIATED BY	DESCRIPTION
<input type="checkbox"/>	07/28/2023 9:47am PDT	Correction Requested	↶ Step 1: Test Submission	Test Submission	R0000092, 2024, Open PO, Disneyland, Basic Needs, Jane Doe, Total Cost: 500.00, 103001, 30001, 4301, 499900

1-1 of 1 

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Downloading Copies

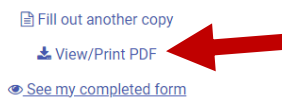
Non-account holders may download PDF copies of their forms any time they view the submission. Account-holders may download PDF copies of submissions both within the view of the form as well as by searching for submissions.

Downloading a copy within the form

1. Click here in the top banner of the form [View/Print PDF](#)
- OR**
2. Click here after submitting the form



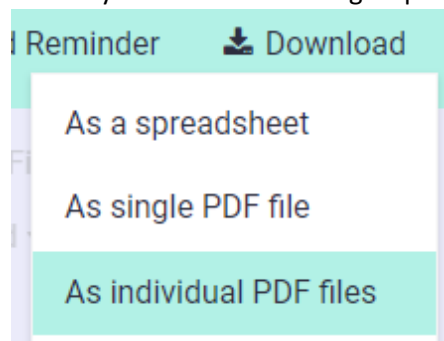
Thank you for submitting your form!



Downloading a copy from the search page (account-holders)

Downloading copies from the search page allows you to download multiple copies at once as well as set a naming sequence for each downloaded document.

1. Access the Search page by clicking **Manage**, then click the form you wish to look under, followed by clicking the button that lists your department(s).
2. [Optional] Enter any search criteria to filter your search results.
3. Click the check box for each document you wish to download. You can click the top check box in the header to select all documents in the filtered results.
4. Click the **Download** button. You may download the results in a CSV file (for Excel), as a single PDF, or as separate PDFs. Downloading as separate PDF files will allow you to select fields that will create a naming sequence for each file downloaded. Once selected, InformedK12 will remember the naming sequence for future downloads. You may set different naming sequences for each type of form.



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5. If you choose to download the forms as separate PDFs, you will be prompted to select the filename format as well as including attachments. To set a filename structure, click the dropdown list and select the fields you want to include. Your PDFs will be named with the values from those fields *in the order you selected them*.

Name PDF files

Select form fields to include in the filename of your PDFs. [Learn more](#)

Select field ⓘ

Select a field from your form ▼

PDF filename format

Ref. # ✕

Fiscal Year ✕

Vendor Name ✕

Attachments

- Do not include attachments
- Include attachments in a separate folder
- Include attachments in PDF

Attachments will be added after each corresponding submission. Only image attachments (e.g. .pdf, .jpg, .png) will be included. To download other attachments (e.g. .txt, .doc), use the "Include attachments in a separate folder" option.

CANCEL

DOWNLOAD

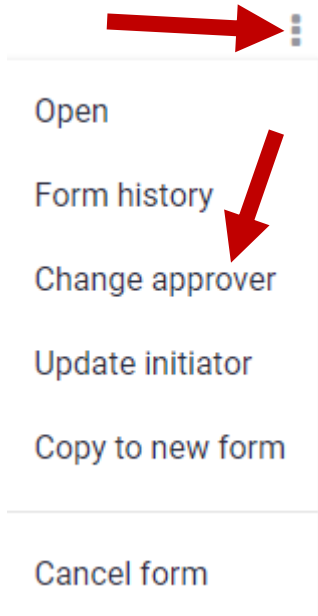


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Changing Approvers (Account-Holders)

If a form was sent to the wrong approver, account-holders may re-route the form to the correct person. Please note that the form may only be re-routed to other approvers within the same dropdown at that step. If the form is missing someone at a different step, it will need to be returned to a previous step to forward accordingly.

1. Access the Search page by clicking **Manage**, then click the form you wish to look under, followed by clicking the button that lists your department(s).
2. [Optional] Enter any search criteria to filter your search results.
3. Click on the three dots to the right of the submission you wish to re-route, then click on **Change approver**.



4. Select the correct approver in the popup and click the **Change** button. The document will be removed from the original approvers queue and moved to the new approvers queue.

Change approver for Step 8

Replace Adult Education | Emerald Templeton [Program Manager] with another approver

Adult Education | Emerald Templeton [Program Manager] Current approver
etempleton@laspositascollege.edu

Academic Services | Nan Ho [Vice President]
nho@laspositascollege.edu

Administrative Services | Anette Raichbart [Vice President]
araichbart@laspositascollege.edu

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Finding the Status of Your Submission

Initiators without accounts may see a quick view of the status of their submission by accessing the form via the link emailed to them. Account-holders may see a detailed view of the status for each submission, as well as the ability to send reminders to the current approver if a form has been waiting.

Non-Account Holders

At any point during the routing process, initiators may access their form link (emailed to them after saving or submitting) and view the status in the top header of the form.

Requisition Request Form

Currently on Step 6 of 16

Submitted on 07/28/2023

For: Jane Doe - R0000092 - Open PO - Di...

Account-Holders

1. Access the Search page by clicking **Manage**, then click the form you wish to look under, followed by clicking the button that lists your department(s).
2. [Optional] Enter any search criteria to filter your search results.
3. Within the table you can see the latest activity status of the form, the date and time, and who the form is currently waiting on for review/approval.

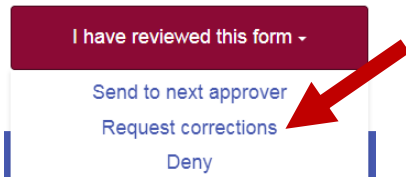
<input type="checkbox"/>	LAST ACTIVITY	STATUS	WAITING ON ▲	INITIATED BY	DESCRIPTION
<input type="checkbox"/>	07/28/2023 11:29am PDT	Reopened	↩ Step 6: Administrative Services Kiley Zieker [Executive Assistant]	Test Submission	R0000092, 2024, Open PO, Disneyland, Basic Needs, Jane Doe, Total Cost: 500.00, 103001, 30001, 4301, 499900

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Returning for Corrections (Account-Holders)

If a form is missing attachments, needs corrections, or was routed incorrectly, account-holders may return the form to anyone else previously routed for review/approval. Please note that once a document is sent back to a previous person/step, it will follow through the same steps again (from that point on). For example, if a form has been forwarded to Step 5 and is then returned to Step 3, it must then route to Step 4 and 5 again to review and approve any changes. It will not skip any required steps. This ensures that any changes or revisions are reviewed and approved by the necessary signers.

1. Click the button **I have reviewed this form**, followed by the option **Request corrections**.



2. Select the appropriate person to return the form to. This will remove the form from the current approvers queue and move it to the selected person. Any person the form has been routed to will appear in the dropdown.

Send the form back for corrections

RECIPIENT *

Select a recipient...

Select a recipient...

- (1) Initiator: Ellie Hirstein
- (6) PATH | Ellie Hirstein [Senior Administrative Assistant]
- (8) PATH | Kevin Kramer [Dean]
- (11) Non-Grants (Fund starts with 1/4/5/6/9) | Thomas Rothman
- (12) Administrative Services | Sui Song [College Administrative Services Officer]

3. Once the **Recipient** has been selected, select the reason for returning the form, as well as providing a custom message to indicate what must be corrected. Your message will appear in large red text at the top of the form and in the auto-generated email.

Send the form back for corrections

RECIPIENT *

(1) Initiator: Test Submission

REASON FOR SEND BACK *

Incorrect budget code

MESSAGE FOR RECIPIENT *

Please verify budget and enter the correct FOAP

⚠ This message will show up in an email they receive

Important!

This form will go back through the approval route when you request corrections. Follow up approvers will need to re-sign/approve this form.

Cancel Request corrections

Currently on Step 1 of 16 (Test Submission – lpc-businessoffice@laspositascollege.edu)

Sent back from Step 6 to 1 on 07/28/2023 (Incorrect budget code)

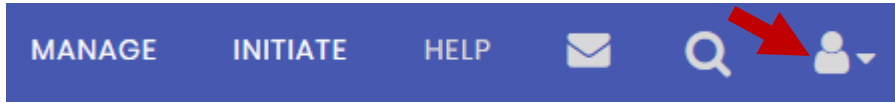
Please verify budget and enter the correct FOAP.

– Thomas Rothman

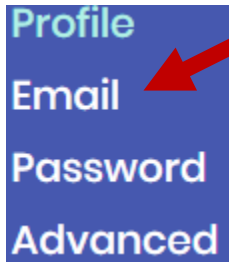
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Email Notifications (Account-Holders)

Account-holders may enable or disable email notifications via their account settings page.



- 1.
2. Click on **Account settings**
3. On the left sidebar, select **Email**



4. On the **Email** page, you may choose which type of email notifications to turn on or off. Any forms in your queue will still continue to be available in your inbox. 

Email notifications

Approval needed

Sent when a form needs your approval.

On Off

Initiate forms

Sent to confirm that you've initiated a form.

On Off

Save progress

Sent each time you save your form.

On Off

Form complete

Sent when your form has completed the approval process.

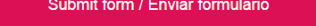
On Off

Save

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Submitting a Form

You do not need an account to submit a form. When submitting a form, all fields must be filled out as necessary. **Red fields** are required, while **yellow fields** are optional. Some forms may also require attachments.

1. Once your form is complete, click on the **Submit form** button 
2. Some forms will prompt you to select an employee to review your submission, while others will prompt you to select a number of approvers. Some forms may also prompt a question in which the answer will determine if additional routing is necessary. For each form you submit, please be sure to select the appropriate recipients for that form to be routed to.

Forwarding for Review

Select the appropriate person in your division to send your form forward for review.

Please select next recipient for **Assistant (review)**

[Back to question](#)

NAME/EMAIL

[Customize message](#)

Administrative Services | Kiley Zieker [Executive Assistant] (kzieker@laspositascollege.edu) ▼

Send to recipient

[Add people to notify](#)

Responding to Optional Routing Questions

In the example below, answering “**Yes**” to the question will trigger an additional routing step for a coordinator to approve. Answering “**No**” will skip that step and prompt you to forward your submission to an Admin or Executive Assistant for review. Certain steps within the workflow of each form may have different questions.

Does your request need coordinator approval?

Yes

No

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Selecting Multiple Approvers

In the example below, Steps 2-5 are optional approvers and should be selected only when necessary or appropriate. Step 6 is required and must be selected. Enable or disable the optional routing steps, as necessary, and select the appropriate person in each dropdown list.

Next steps/approvers

Enter the necessary approvers and uncheck any steps that aren't needed. [Learn more](#)

<input type="checkbox"/>	STEP	NAME	EMAIL
<input checked="" type="checkbox"/>	Step 2 - IT review? (all technology & software)	IT Steve Gunderson [Manager]	(sgunderson@laspositascollege.edu)
<input type="checkbox"/>	Step 3 - M&O review? (installation, large equipment, etc.)	M&O John Seybert [Director]	(jseybert@clpccd.org)
<input type="checkbox"/>	Step 4 - Categorical Program Assistant (review)	Select Approver...	
<input checked="" type="checkbox"/>	Step 5 - Coordinator/Director (approval)	Veterans Evelyn Andrews [Program Supervisor]	(eandrews@laspositasc
<input checked="" type="checkbox"/>	Step 6 - Assistant (review) (this step is required)	Administrative Services Kiley Zieker [Executive Assistant]	(kzieker@las

Approvers of Step 7, 8, 9, 10, 11, 12, 13, 14, 15, and 16 can not be specified by you and are not shown.

Confirmation

Reviewed and approved

Requisition Request Form initiated by Test Submission (lpc-businessoffice@laspositascollege.edu)

Next approvers

This form will be sent to the following people in this order:

- Step 2 - IT review? (all technology & software) - IT | Steve Gunderson [Manager] (sgunderson@laspositascollege.edu)
- Step 5 - Coordinator/Director (approval) - Veterans | Evelyn Andrews [Program Supervisor] (eandrews@laspositascollege.edu)
- Step 6 - Assistant (review) - Administrative Services | Kiley Zieker [Executive Assistant] (kzieker@laspositascollege.edu)

Approve this form



Thank you for submitting your form!

[Fill out another copy](#)

[View/Print PDF](#)

[See my completed form](#)