

NAVIGATING FORUM FOR VENDORS

Welcome to Forum, Colorado Judicial’s online marketplace forming the center of judicial and public business.

This document covers account setup, site navigation, task approval and workflows, managing contacts, and home page customization

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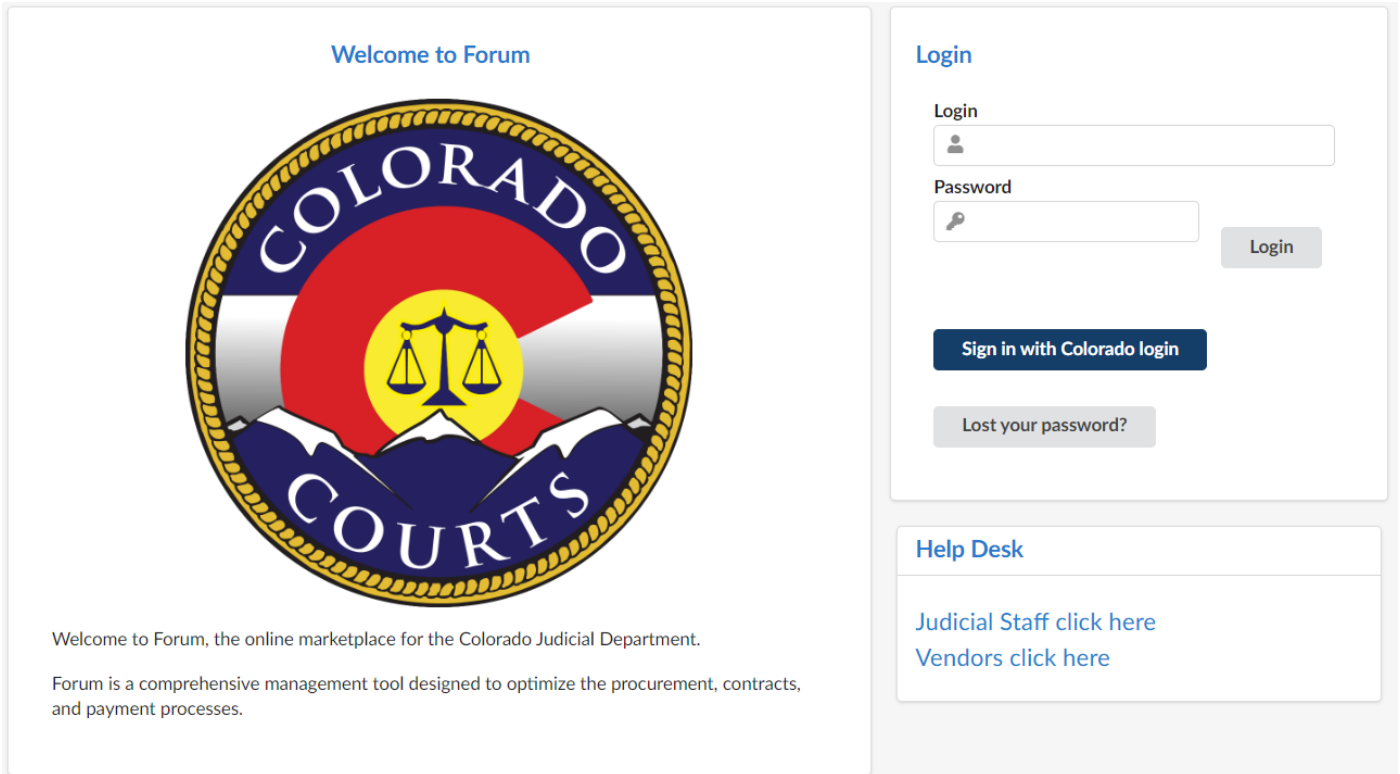
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LOGGING ON TO FORUM

All Judicial Vendors will be invited to join Forum via email sent by no-reply@ivalua.com. Click the link in the email, and use the login credential and one-time password from the email to log in.

NOTE: For the best user experience, use Google Chrome as your browser.

The following screen will appear.



Welcome to Forum

Colorado Courts

Welcome to Forum, the online marketplace for the Colorado Judicial Department.

Forum is a comprehensive management tool designed to optimize the procurement, contracts, and payment processes.

Login

Login

Password

Login

Sign in with Colorado login

Lost your password?

Help Desk

[Judicial Staff click here](#)

[Vendors click here](#)

1. Enter your username and one-time password from the email and click **Submit**.

FIRST USE: ACCEPTING TERMS & CONDITIONS

If you are logging on to Forum for the first time, you must accept the Terms & Conditions of Use.

You should peruse the Terms & Conditions, then select the checkbox **I accept terms and conditions** and click **Validate** to access the system.

FORGOT YOUR PASSWORD?

If you should lose your **login password**, you can request a new temporary password from the *Identification* frame.

A login form titled "Login" with two input fields: "Login" (with a person icon) and "Password" (with a key icon). A "Login" button is to the right of the password field. Below these is a dark blue button labeled "Sign in with Colorado login" and a red-bordered button labeled "Lost your password?".

1. In the window that displays, enter your email address and the secure field (captcha).

A dialog box titled "Password lost?" with "Close" and "Confirm" buttons. It contains a text input field with the prompt "Forgot your password? Please fill your email address.*". Below is a "Security Control" section with a text input field and a captcha image showing the characters "3A2L".

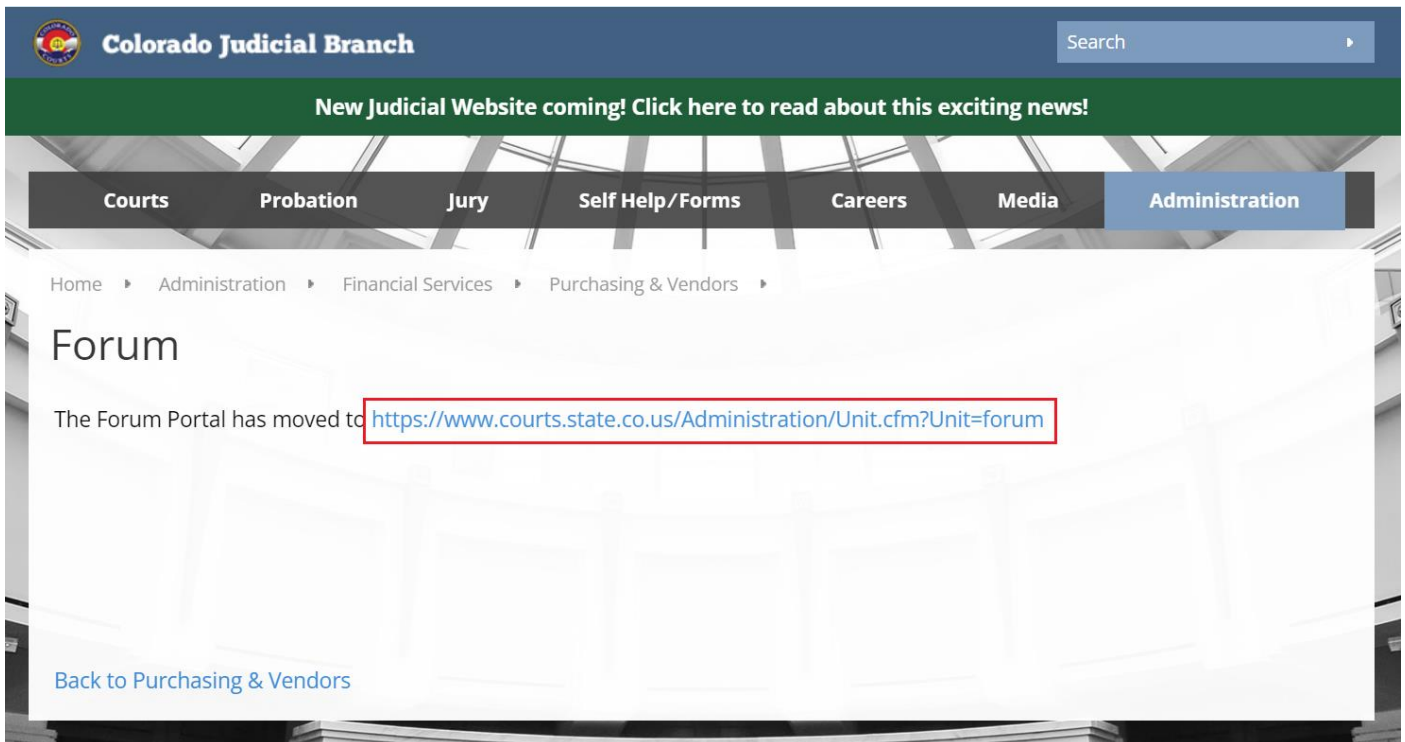
2. Click the **Deliver password** button.

HOW TO RECEIVE HELP

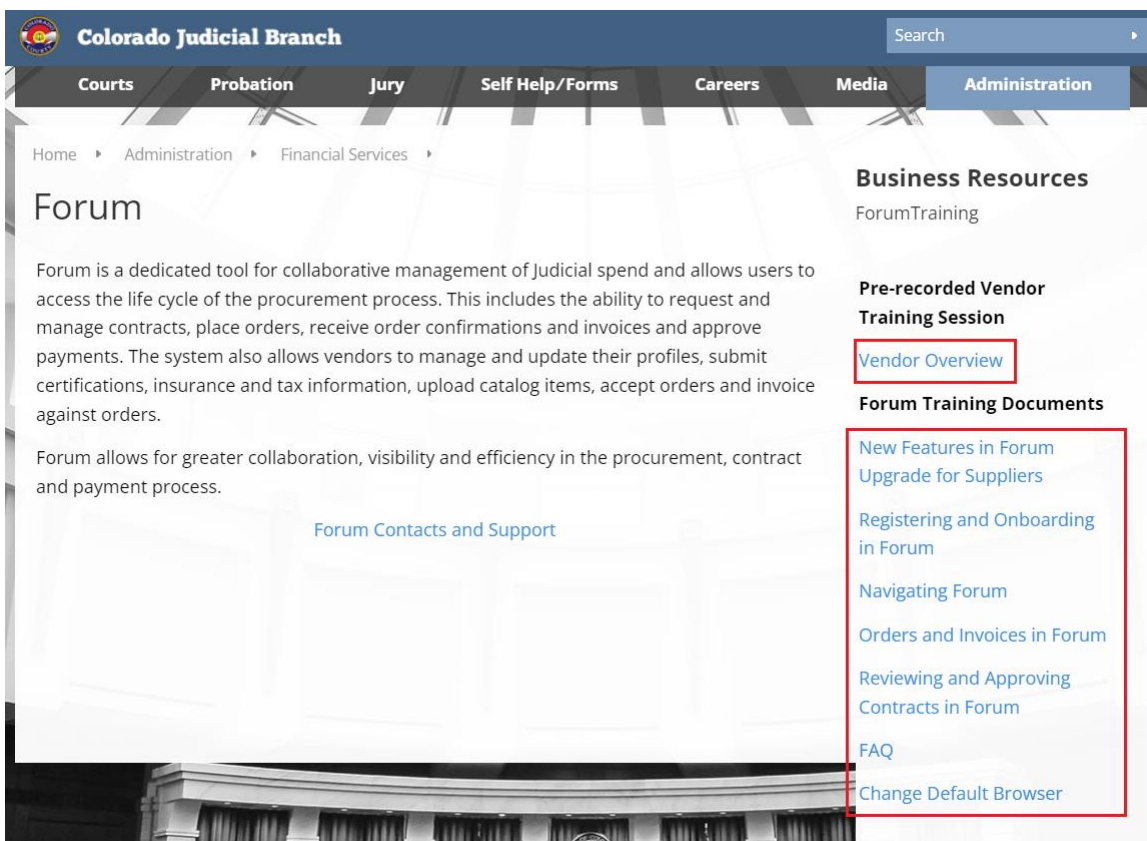
While using Forum you may run into instances where you need help to proceed. Training documents have been created to cover general problems and solutions you may experience. To find the training documents first click [Vendors Click Here](#) in the Help Desk section of the login screen.

A "Help Desk" section with two links: "Judicial Staff click here" and "Vendors click here". The "Vendors click here" link is highlighted with a red rectangular border.

This will bring you to a redirection page. Click <https://www.courts.state.co.us/Administration/Unit.cfm?Unit=forum> to proceed



After clicking on the redirection link you will be brought to Forum page of the Colorado Judicial Branch website. On the right side of the screen are links to training videos and documents. Clicking on one of these links will open the training in a new tab.



Another way to receive help is to reach out to your Judicial contact. To view who your Judicial contact is navigate to the Contacts screen of your company information. Your Judicial contact(s) will be listed under the Client Contacts section.

Company Info proc 1 (UNITED STATES / Colorado / Denver) Search

Save Request Information Change

Contacts

- Criminal History Check Status
- Documents & Certs.
- Qualifications
- Change Log
- Addresses

Client Contacts

Contact	Email	First Name	Last Name
Liaison ADMIN -Procurement	Proc@cjdadmin.com	ADMIN - Procurement	Liaison

An additional place to find a Judicial contact to reach out to is on the Forum page of the Colorado Judicial Branch website. Clicking the Forum Contacts and Support link will open a new tab with Judicial contacts by district along with their contact information.

Colorado Judicial Branch

Courts Probation Jury Self Help/Forms Careers

Home Administration Financial Services

Forum

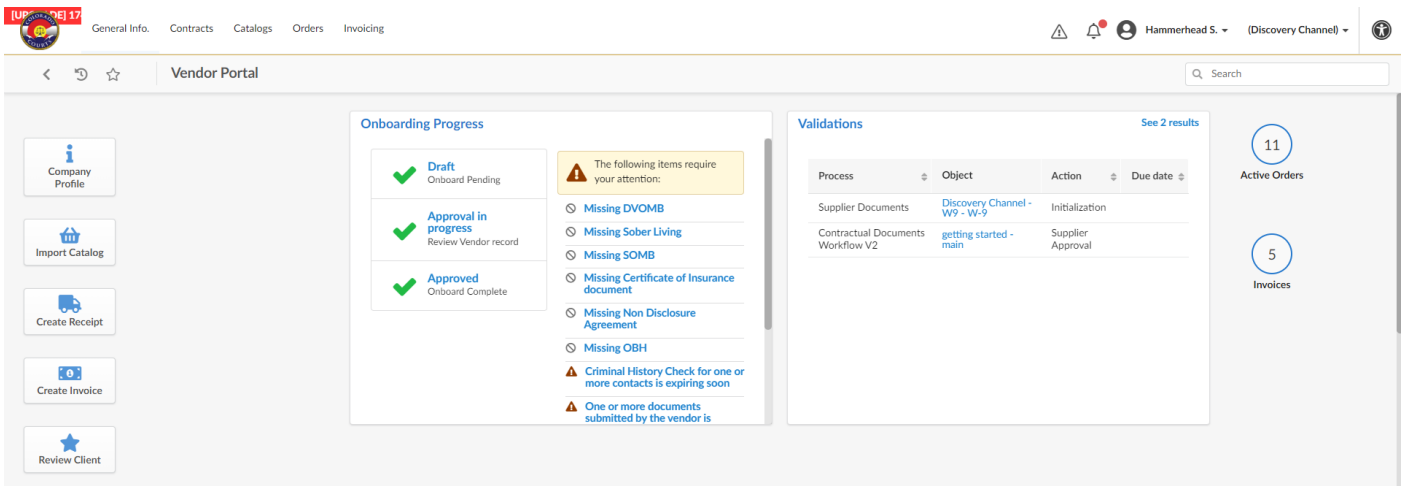
Forum is a dedicated tool for collaborative management of Judicial spend and allows users to access the life cycle of the procurement process. This includes the ability to request and manage contracts, place orders, receive order confirmations and invoices and approve payments. The system also allows vendors to manage and update their profiles, submit certifications, insurance and tax information, upload catalog items, accept orders and invoice against orders.

Forum allows for greater collaboration, visibility and efficiency in the procurement, contract and payment process.

[Forum Contacts and Support](#)

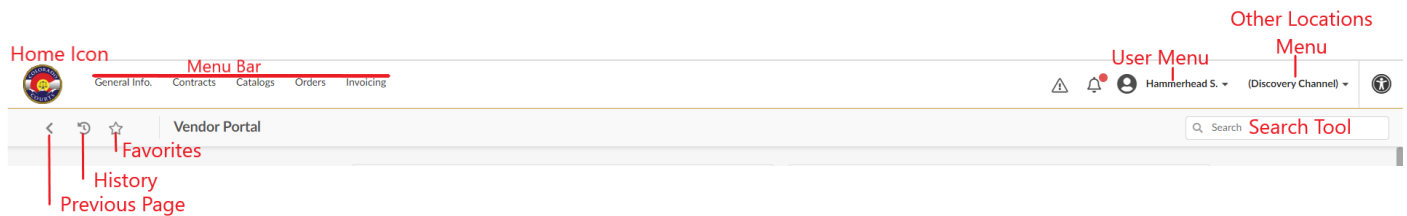
HOMEPAGE TOUR



Once logged on to Forum, you will access your home page. This page allows you to manage your company information, view Judicial orders, create invoices, and add your catalog items or services to Forum.

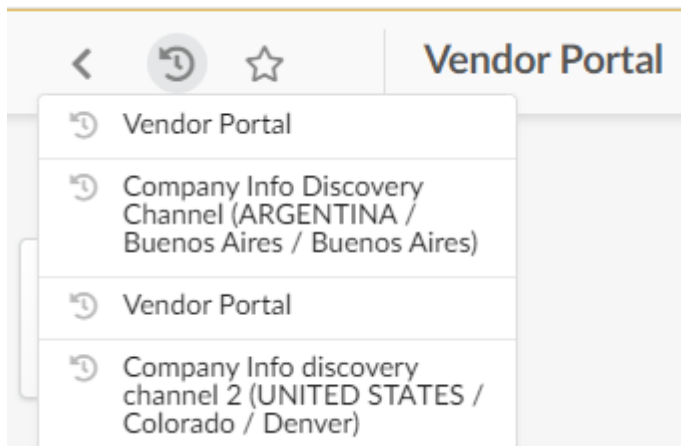


NAVIGATION AND ACCESS

Navigation controls are grouped in the navigation header:



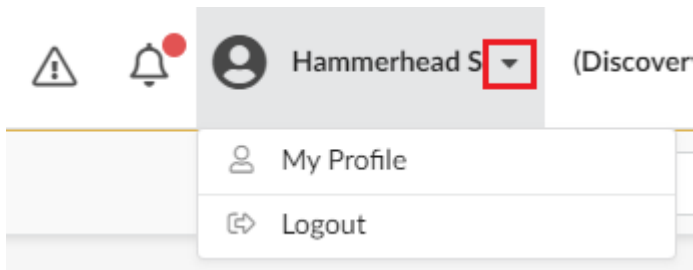
NAVIGATION CONTROL	DESCRIPTION
Home Icon (logo)	Returns to home page from any page in the application.
Menu Bar	These menu options provide you with access to the different Forum modules and functionalities that fall within the scope of your user profile. The display of menus and menu options may also vary according to the modules that have been activated in your application.
Previous Page/History	Use the back arrow button  to go back to the previous screen. Click history  for a list of the screens you have recently visited. You can click on any of the items in the list to go directly to that screen.



Search Tool	<p>Quick search searches the keywords entered across the entire site to give you quick, direct access to invoices, contract, client name, etc.</p> <div data-bbox="293 248 855 315" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <input type="text" value="Search"/> </div> <p>Hover your mouse over the text input box to display user assistance on the appropriate keywords and syntax for this tool.</p>
Favorites	<p>Favorites management</p> <div data-bbox="284 472 1498 770" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Add page as favorite</p> <p>Vendor Portal #3 Page Title Add page Creat Favorite</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p>Orders & Deliveries ▾</p> <p> Manage Orders</p> </div> </div> <p>When adding a search page as a favorite, all the selected search filters will be saved with the favorite. Once created, the favorite can be recalled using the same Star icon.</p> <p>On a page that has already been saved as a favorite, the Star icon will be yellow ★.</p> <p>Use the edit or delete icons to edit or delete a favorite.</p>

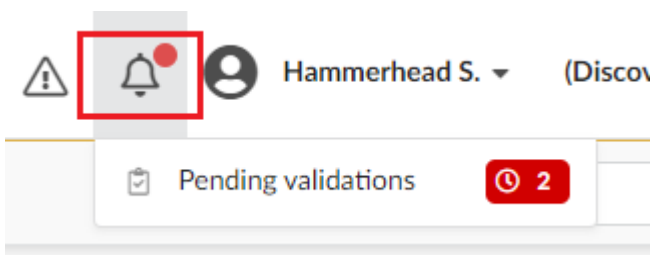
USER OPTIONS MENU

On the upper right side of the Forum window will display your username. Clicking on your username presents the following options:



MENU OPTION	DESCRIPTION	MORE INFORMATION ON PAGE:
My Profile	View your Account Profile and Preferences	8
Logout	Click to exit Forum	

Pending Validations can be found by clicking on the Bell icon next to your name.



Menu Option	Description	More Information on Page:
My Pending Validations	Shows items that you must act on as part of an approval process; allows you to delegate items to others.	9

ERGONOMICS OF COMMON PAGES

Forum has two types of pages that are used and that work the same way throughout the application. These are search (or browse) pages and data record pages.

SEARCH PAGES

Search pages are typically comprised of the following parts:

Search/Filter area


Keywords **Action buttons**

Org Unit

Search/Filter Results

ID	Requester	Status	Currency	Probationer First Name	Probationer Last Name	Org Unit	Service Expiration Date	Ordered	Invoiced	Progress	PO	Name
PO164079	Officer ADMIN - Probation	Ordered	USD	Great	White-Shark	1st Probation	5/13/2023	115.00	115.00	Acknowledged		Great White-Shark-REQ3/29/2023-Discovery Channel
PO164071	Officer ADMIN - Probation	Ordered	USD	Great	White-Shark	1st Probation	5/16/2023	2,000.00		Acknowledged		Great White-Shark-REQ3/26/2023-Discovery Channel
PO164070	Mayberry Shelli	Ordered	USD	Great	White-Shark	1st Probation	4/15/2023	5,000.00	5,000.00	Acknowledged		Great White-Shark-REQ3/26/2023
PO164060-2	Mayberry Shelli	Ordered	USD	Tiger	Shark	1st Probation	4/15/2023	25,000.00		Initialized; Vendor Acknowledgment		Tiger Shark-REQ3/24/2023-Discovery Channel
PO164063	Officer ADMIN - Probation	Ordered	USD	Tiger	Shark	1st Probation	4/15/2023	10,000.00	10,000.00	Initialized; Vendor Acknowledgment		Tiger Shark-REQ3/24/2023-Discovery Channel
PO164062	Officer ADMIN - Probation	Ordered	USD	Great	White-Shark	1st Probation	6/30/2023	10,000.00		Initialized; Vendor Acknowledgment		Great White-Shark-REQ3/24/2023-Discovery Channel

SEARCH FILTERS AREA

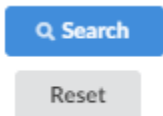
Available on all search pages, this area contains the search filters or criteria that help you easily retrieve an item or a group of items from a list. Open the filter list by clicking the filter icon  on the upper left.

SEARCH AND RESET BUTTONS

When you are done defining your search filters, use the following buttons to:

Launch the search, while applying the selected filters. The search results list is updated according to found items.

Cancel the filters you have selected (and go back to the default filters).



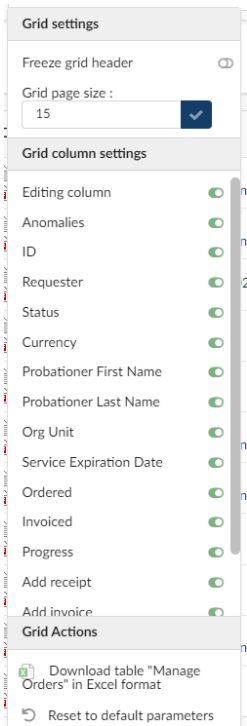
RESULTS LIST

The results list presents the data that match the selected search filters.

Lists may be sorted using column headers. Not all columns are sortable. You can determine if a column is sortable by hovering your mouse cursor over its header, and if your cursor turns into a hand and the header label is underlined you can sort by that column. Once the list is sorted by a column, this is indicated by the presence of a triangle to the right of the header label. The triangle orientation indicates the sort order: ▼ (ascending or alphabetical order is shown by an downward facing triangle) or ▲ (descending or counter-alphabetical order is shown by an upward facing triangle); click the label again to change the sort order.

SHOWING, HIDING, AND REORDERING COLUMNS; DOWNLOADING IN EXCEL FORMAT

When you are viewing a list of results you may customize the columns that you can see, or reorder any of the columns. Right-click any of the column headers of the results list to access a menu that enables you to perform the following actions:

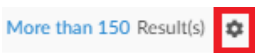


Showing/Hiding columns: Select/Unselect a column label's checkbox in the menu to show/hide the column in the results list.

Reordering columns: Use drag-and-drop on column labels in the menu to reorder columns in the results list.

You can revert anytime to original settings by selecting **Reset to default parameters**.

The right-click menu also allows you to **download the displayed list in Excel format**.



These functions can also be accessed by clicking the gear icon in the lower right corner of the grid.

NUMBER OF RESULTS

The number of found results is indicated in the bottom left corner of the list; when found results are numerous, they are split up into various pages; these may be accessed using the links located in the bottom left corner of the list:

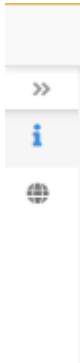


To maximize performance, the number of displayed results is limited to 150 by default. When found results exceed this limit, the number of results indicates: +150 Results. Click this link to access the full number of results.



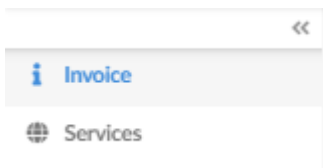
TABS

Tabs structure data into coherent, thematic sets.



Tabs are laid out vertically in a collapsible panel that is docked on the left-hand side of the window. By default, the panel is collapsed to its minimal size and only shows tab icons.

Clicking the right facing double arrow icon » expands the panel to show tab labels. Clicking the left facing double arrow icon « collapses the panel to show tab icon.



You may navigate from one tab to the other without losing unsaved data. However, you must save the data you wish to keep before leaving the page; to save all tabs at once, use the **Save** or **Save and close** buttons.



To save a page, you must first fill in the required fields, these are marked with a red asterisk *. If you try to save a page when required fields have not been filled out, the field will turn red and alerts will appear at the top of the page.

Save Save & Close Validate Cancel Invoice

⚠ Supplier Invoice Number must have a value
 ⚠ Order must have a value

> Legal Invoice

Invoice Header

Supplier Invoice Number* DO NOT USE CLIENT NAME-INVOICE...
Supplier Invoice Number must have a value

Invoice Date* 10/25/2023

Probationer

Probationer cases

Currency* USD

Supplier Information

Vendor ⓘ GATEWAY TO SUCCESS PC - 2429 South Prairie Ave

Contact

Order* Order must have a value

Linked Invoice (credit)

Contract

ACTION BUTTONS

In a data record, available action buttons depend on context: for instance, the **Save** button may become unavailable once an item has approved and has become read-only.

In some cases, possible actions may be too numerous to display them all as buttons. In such cases, part of available actions will be grouped together under the **Other Actions** button.

Available action buttons are displayed in the upper mid-section of the page.

Red and green buttons are generally linked to approval workflows.

OVERVIEW: SETTING UP YOUR USER PREFERENCES

MY PROFILE

Your profile section is divided into three areas: My preferences, Identity, and Password.

MY PREFERENCES

Use the My preferences section to set your default Time Zone, as well as set any format or language preferences.

My preferences

Default lang
English

Default country
[Empty]

Time Zone
[Empty]

Currency
USD

Format lang
English (United States)

Date format
4/27/2023 12:45:41 PM

Number format
-1,234,567.89

IDENTITY

Use the Identity section to add or update your contact information.

Identity

First Name * Hammerhead **Last Name *** Shark

Email * hammerhead@oldshark.com **Internal Identifier** [Empty]

Position [Empty]

Supplier CA test ryan, Discovery Channel, discovery channel 2

Daily Working Time (hours) [Empty]

Phone

Phone [Empty]

Cell Phone [Empty]

Fax [Empty]

Photo

[Add picture]

Last Connection

Last Connection
4/27/2023 at 11:11 AM with IP address: 165.127.97.9

PASSWORD

Use the Password section to update your password.

Password ⓘ

Current password

New password

Confirm new password

Update **Cancel**

MY PENDING VALIDATIONS

My Pending Validations is your “To do list”. Any items requiring action on your part will be displayed here.

< ⌂ ☆ To do list Q Search

Status: To be validated From: To: Search Reset

Filters: Status: To be validated ×

Process	Object	Action	Forwarded on	Action's date (UTC-6)	Due date	Status
Supplier Documents	Discovery Channel - W9 - W-9	Initialization		4/14/2023		○●○
Contractual Documents Workflow V2	getting started - main	Supplier Approval		4/14/2023		○●○

2 Record(s) ⚙