

REGISTERING AND ONBOARDING WITH FORUM FOR VENDORS

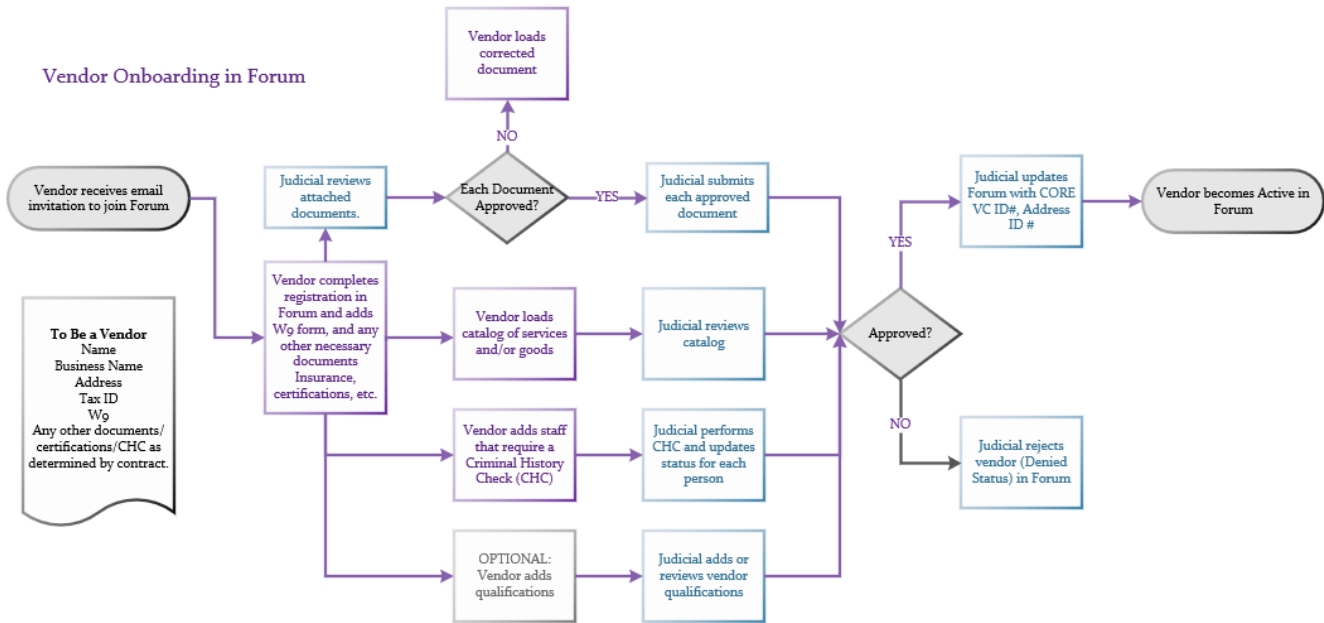
Welcome to Forum, Colorado Judicial’s online marketplace forming the center of Judicial and public business.

This document covers the steps required to complete the vendor onboarding process. Once this process is complete, Judicial will be able to purchase your services and goods and receive invoices through Forum.

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Vendor Onboarding in Forum




LOGGING ON TO FORUM

All Judicial Vendors will be invited to join Forum via email sent from noreply@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.

Welcome to Forum



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

Help Desk

[Judicial Staff click here](#)

[Vendors click here](#)

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

FIRST USE: ACCEPTING TERMS & CONDITIONS

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

You should review the Terms & Conditions, then select the checkbox **I accept terms and conditions** and click **Acknowledge** to access the system. If you are unable to accept the terms and conditions, please reach out to your support contact. You can find your support contact on the [Forum Portal](#).

law as nearly as possible to reflect the original intentions of the parties, and the remainder of the provisions will remain in full force and effect. Waiver by either party of a breach of any provision of these Terms of Use or the failure by either party to exercise any right hereunder shall not operate or be construed as a waiver of any subsequent breach of that right or as a waiver of any other right.

Governing Law and Jurisdiction
By accessing this Site, you agree that the statutes and laws of the State of Colorado, without regard to the conflicts of laws principles thereof, shall govern all matters relating to your access to, or use of, this Site and any materials. You also agree and hereby submit to the exclusive personal jurisdiction and venue of the Courts of the State of Colorado with respect to such matters.

I accept the terms and conditions

Acknowledge **Print**

FORGOT YOUR PASSWORD?

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

Lost your password?

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

Password lost? 🖨️ 🗑️ ✕

Close | **Confirm**

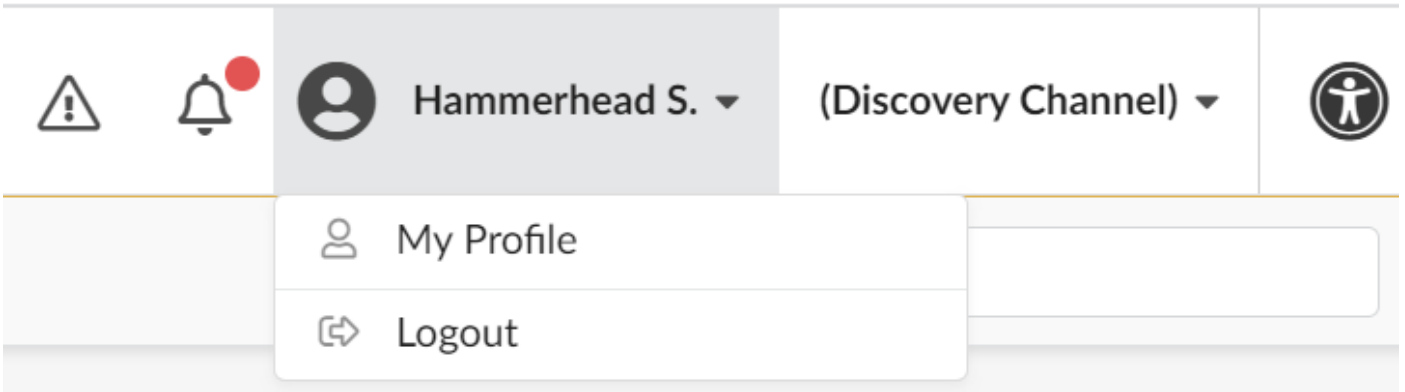
Forgot your password? Please fill your email address. *

Security Control
Security Control 4 F 4 H

Click the **Confirm** button.

SETTING UP YOUR USER PREFERENCES

To view your user profile and update your preferences, click the *down arrow* to the right of your name in the upper right corner of your screen.



MENU OPTION	DESCRIPTION
My Profile	View your Account Profile and Preferences
Logout	Click to exit Forum

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

Default country

Time Zone

Currency

Format lang

Date format

Number format

IDENTITY

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

Identity

First Name* Last Name*

Email* Internal Identifier

Position ⓘ

Supplier

Daily Working Time (hours)

Phone

Phone

Cell Phone

Fax

Photo

Last Connection

Last Connection
4/27/2023 at 10:32 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



MY PENDING VALIDATIONS


My Pending Validations is your “To do list”. Any items requiring action on your part will be displayed here. Click the edit (pencil) icon  to the left of the process name to complete the process.

< ↻ ☆ To do list

Status From To

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			<input type="radio"/> <input type="radio"/>
 Contractual Documents Workflow V2	getting started - main	Supplier Approval	4/14/2023			<input type="radio"/> <input type="radio"/>

2 Record(s) 

UPDATING YOUR COMPANY INFORMATION

You can change your company information by clicking **Request Information Change** on the top of the *Company Information* page.

Save

Request Information Change

Judicial will review the changes and approve, or work with you to ensure the changes are also updated in Colorado’s payment system (CORE) before approving.

This process is used to ensure that payment information is synchronized between systems, so that you do not have any issues or delay in receiving payment.

NOTE: You do not need to use Request Information change to add company contacts, initiate CHC, or add requested documents (i.e. W9, certificate of insurance).

ADDING STAFF AND USERS

From the left-side menu, click the **Contacts** link.

You will see a list of your company contacts. Review this list and assign roles to staff as appropriate. **All of your staff members that require a criminal history check (CHC) must be added in Forum.** Only staff that will need to view contracts, PO, or Invoice need to be given a login.

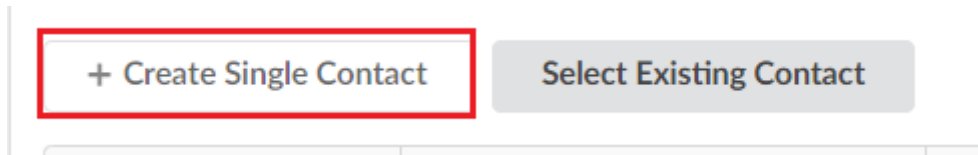
NOTE: You must be assigned the Vendor Admin role to add staff for system access and criminal history checks

The screenshot shows the 'Internal Contacts' interface. At the top, there are two buttons: 'Re-Initiate CHC' and 'Initiate CHC'. Below these are two buttons: '+ Create Single Contact' and 'Select Existing Contact'. The main area contains a table with the following columns: Contact, Login, Position, Role, and Contact status. The table lists three contacts: Shark Bull, Shark Hammerhead, and Test Ann. A dropdown menu is open for the 'Shark Bull' contact, showing role options: Vendor admin, Account Manager, Accounting, CEO, Default Contact, and Sales. The 'Vendor admin' role is currently selected.

Contact	Login	Position	Role	Contact status
Shark Bull	bull.shark@ismean.com		Vendor admin	Active
Shark Hammerhead	hammerhead@oldshark.com		Account Manager	Active
Test Ann	anntest@email.com		Sales	Active

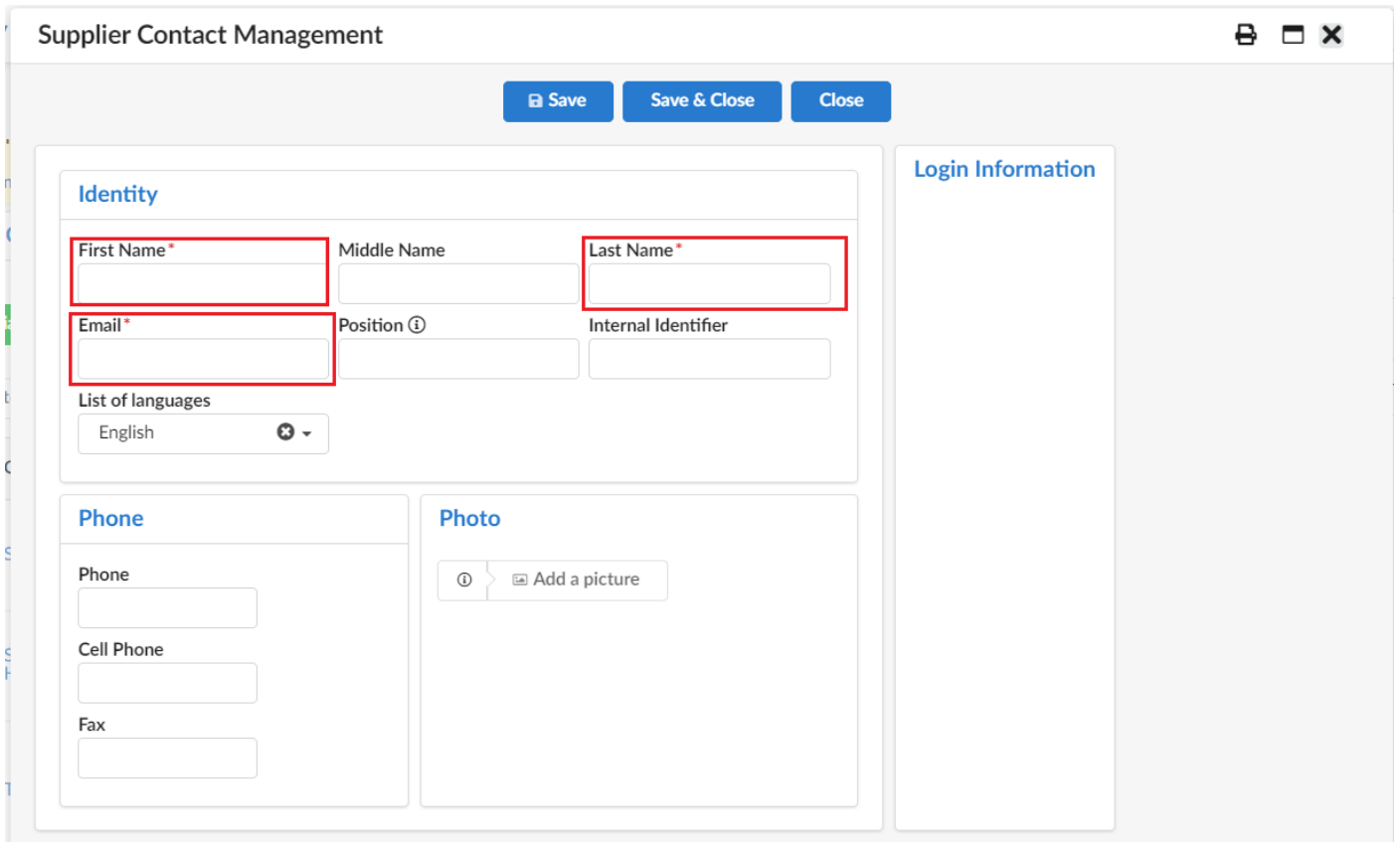
ADDING NEW USERS

To add a new user to the system, click **Create Single Contact**.



Fill in the appropriate information for this user. First Name, Last Name, and email are required.

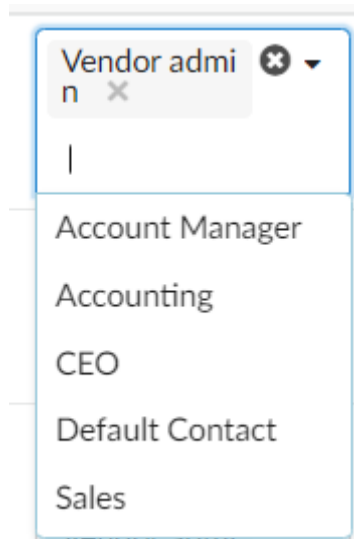
You can save your information as you go by clicking **Save**, when you are finished click **Save & Close**.



Once the user has been added, you can assign them to a role and invite them to login.

ROLES

To assign a user to a role, click the dropdown and select the role. A user may be added to multiple roles.



Vendor admin can view the company's Tax ID number, add staff, and manage Criminal History Checks (CHC) as well as can view, edit, and manage PO and Invoices.

Default Contact has the same abilities as Vendor Admin but will be the person that PO are sent to by default. Forum cannot send PO to multiple users. The Default Contact cannot view the Tax ID number or add staff, but a user can be assigned the Default Contact role and the Vendor Admin role.

If you would like to have PO sent to multiple users, Judicial recommends using your email provider (Outlook, Gmail, etc.) set up an Inbox rule to forward emails from Forum to the appropriate contacts. Search the help section of your email provider for step by step instructions on how to do this.

The remaining roles are informational only, and all have the same general access to view, edit, and manage PO and Invoices as well as view signed contracts.

LOGIN

To invite users to login to Forum, click the envelope to the right of their name. Forum will send an email with a username and a one-time password allowing the user to register.

Internal Contacts

Request a CHC for current employees only

Re-Initiate CHC
Initiate CHC

+ Create Single Contact
Select Existing Contact

Contact	Login	Position	Role	Contact status
Shark Bull	bull.shark@ismean.com		Vendor admin	Active
Shark Hammerhead	hammerhead@oldshark.com		Vendor admin	Active
Shark Lemon				Active
Test Ann	anntest@email.com		Default Contact Vendor admin	Active

INCLUDING EXISTING STAFF MEMBERS

If you have a staff member who is already present in the system (for example, a staff member that works for your company in a different location), click **Select Existing Contact** and select the user from the list of names provided. Do not add the same user as a single contact to multiple locations, as they will be recorded as distinct users in the system.

COMPLETING CRIMINAL HISTORY CHECK (CHC)

From the left-side menu, click the **Criminal History Check Status** link.

The screenshot shows a sidebar menu on the left with the following items: Contacts, Criminal History Check Status (highlighted), Documents & Certs., Qualifications, Change Log, and Addresses. The main content area displays a table with the following data:

First Name	Middle Name	Last Name	Criminal History Check Status	Start Validity Date	End Validity Date
Bull		Shark	Required	4/14/2023	4/15/2023
Hammerhead		Shark	Required	4/14/2023	4/15/2023
Ann		Test	Required		
3 Record(s)					⚙️

Vendors will not receive copies of the background check form from Judicial. Instead, an email will be sent directly to your employee. The employee will follow a link and can submit the information and authorization to perform a criminal history check.

Colorado Judicial will perform the CHC for each of your staff members, as the authorization forms are received. You can view the status and validity date of your staff’s CHC as they are completed. When one or more person’s CHC is not in Suitable or Suitable (upon appeal) status, the following warning will appear on

The screenshot shows an 'Onboarding Progress' panel with the following warning messages:

- Missing Non-Disclosure Agreement
- Missing OBH
- Criminal History Check for one or more contacts is expiring soon
- One or more documents submitted by the vendor is rejected.
- Criminal History Check for Vendor Contact is different from Suitable** (highlighted with a red box)
- Criminal History Check for Vendor contact is not assigned
- No Vendor Contact have a Valid CHC status
- Pending Approval on Document(s)

the Home Page

Work may not commence on many Judicial contracts until all required background checks are complete. The status for background checks are shown below:

CHC Status	CHC Status definitions
Required	The default status of CHC for everyone. Link to CHC will be sent via email from no-reply-colorado@ivalua.com.
Pending	The individual’s authorization form has been received and the CHC is in progress.
Suitable	The individual may access information and perform services for Colorado Judicial.
Suitable (upon appeal)	Status updated from <i>Non Suitable (appealable)</i> when further information is received and the appeal is successful.
Not Suitable (appealable)	Not suitable finding, however status may be changed to Suitable (upon appeal) if more information is provided by individual.
Not Suitable (non-appealable)	The individual may not access information and perform services for Colorado Judicial.
Expired	CHC validity has expired. CHC are generally valid for two years.
N/A	Not Applicable status to be determined by Judicial based on contract terms.

NOTE: You must have at least one eligible staff member with a “Suitable” or “Suitable (upon appeal) CHC status before your services or goods can be purchased by Colorado Judicial.

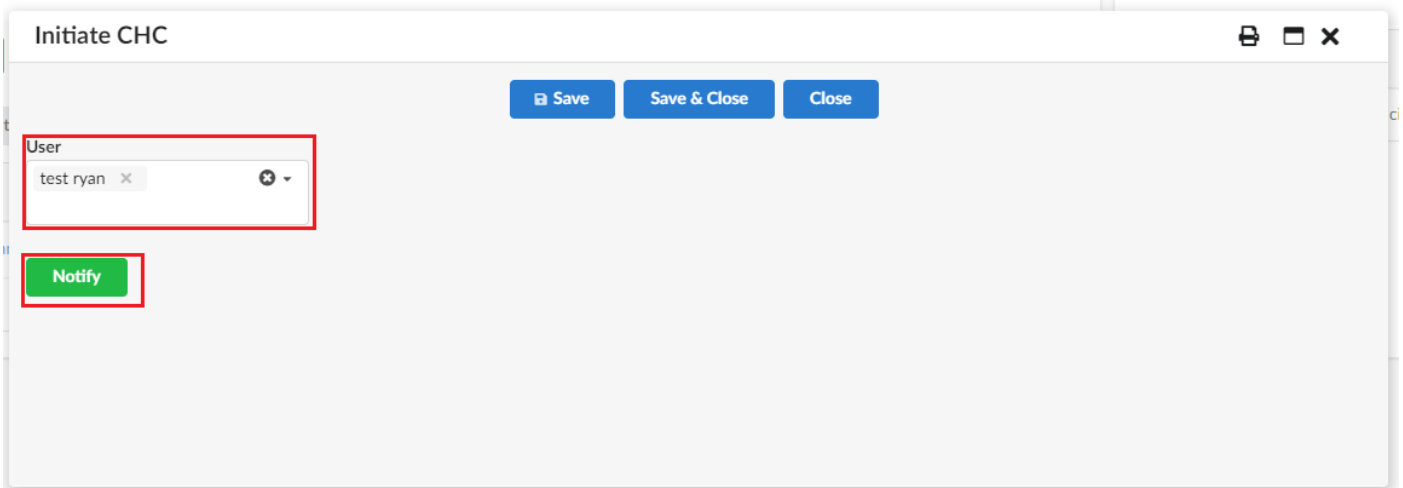
INITIATING A CHC

When a new user is added to Forum the CHC process needs to be initiated. To initiate the CHC process click **Company Profile** under the **General Info.** tab at the top of the screen then navigate to the **Contacts** tab.

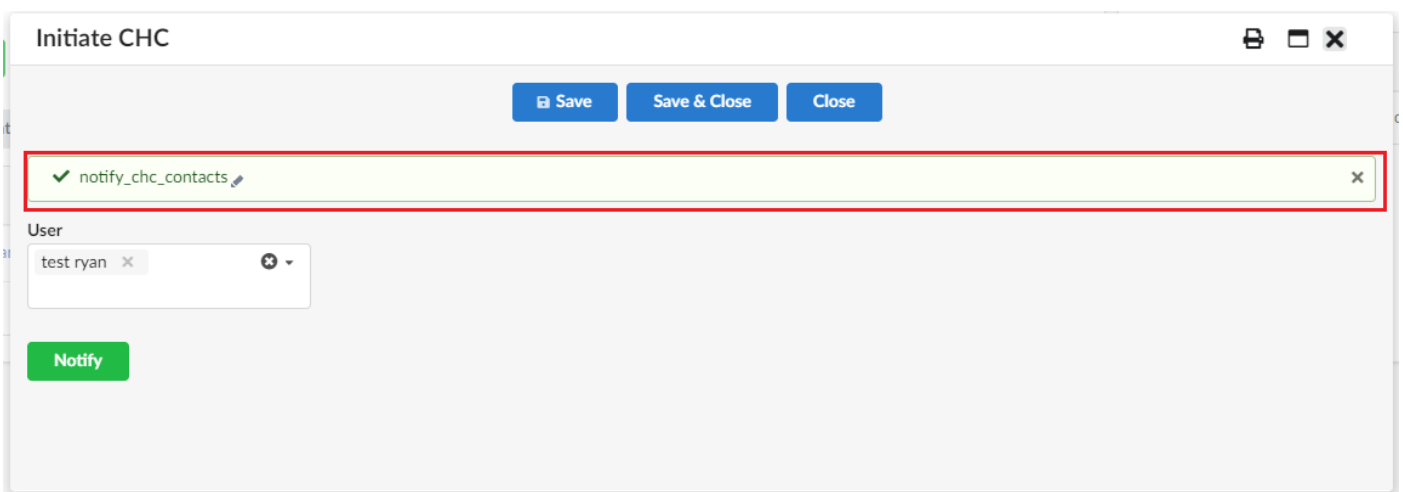
On the Contacts tab click the green **Initiate CHC** button.

The screenshot shows the Colorado Judicial website interface. At the top, there are navigation tabs: 'General Info.', 'Contracts', 'Catalogs', 'Orders', and 'Invoicing'. The 'General Info.' tab is selected. Below this, there is a 'Company Profile' section for 'Ryan's test vendor (UNITED STATES / Colorado / Denver)'. On the left side, there is a sidebar with various options: 'Contacts', 'Criminal History Check Status', 'Documents & Certs.', 'Qualifications', 'Change Log', and 'Addresses'. The 'Contacts' tab is selected in the sidebar. In the main content area, there is a warning message: '- Criminal History Check for Vendor Contact is different from Suitable'. Below this, there is a section titled 'Internal Contacts' with a red heading: 'Request a CHC for current employees only'. There are two buttons: 'Re-Initiate CHC' and 'Initiate CHC'. The 'Initiate CHC' button is highlighted with a red box. There is also a 'Select Existing Contact' button.

This will bring up a window with a drop down where you can select the user(s) who need to have their CHC initiated. Once you have selected the required user(s) click **Notify**.



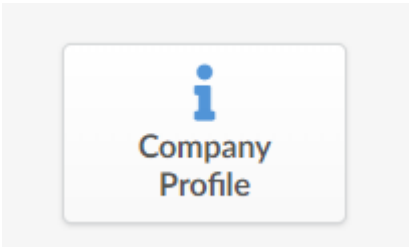
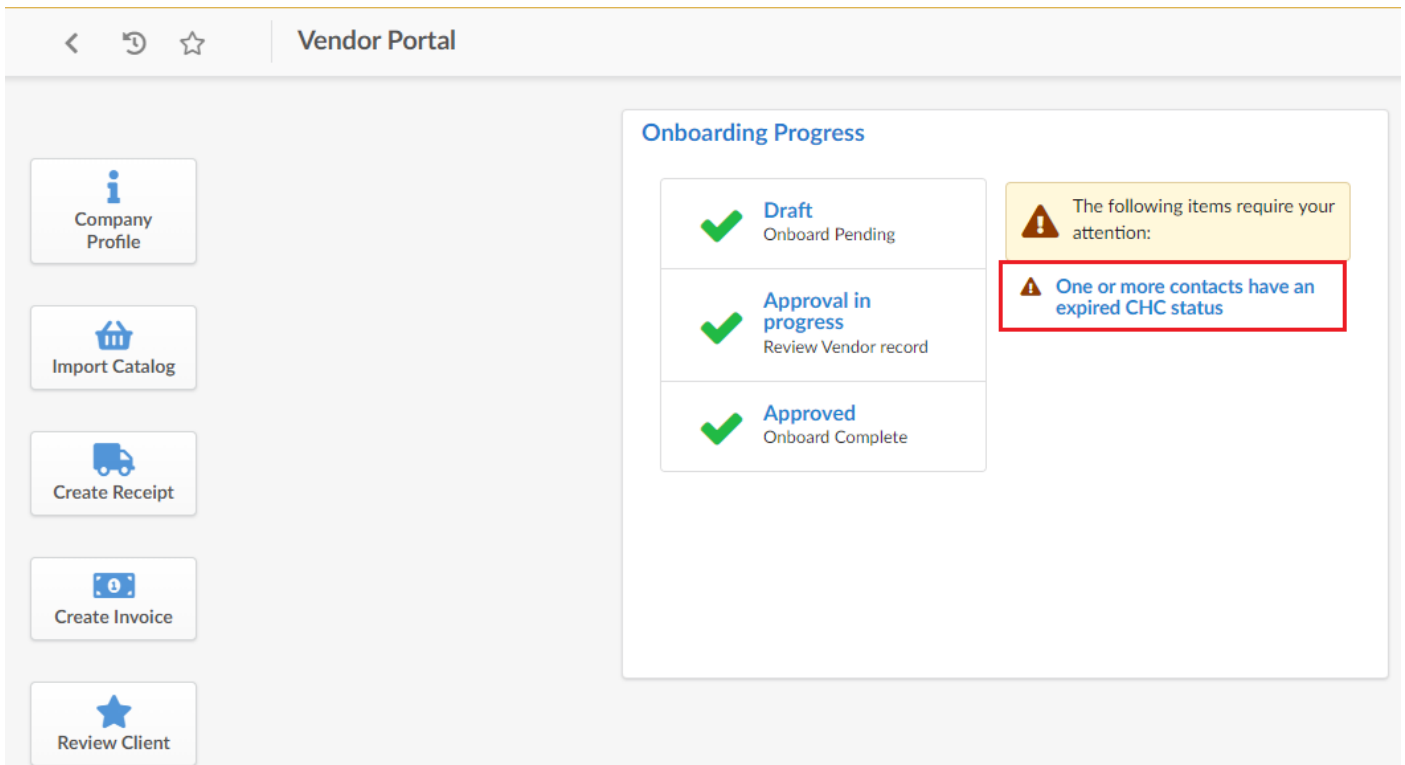
You will know that the notification has been sent if this message appears in the window.



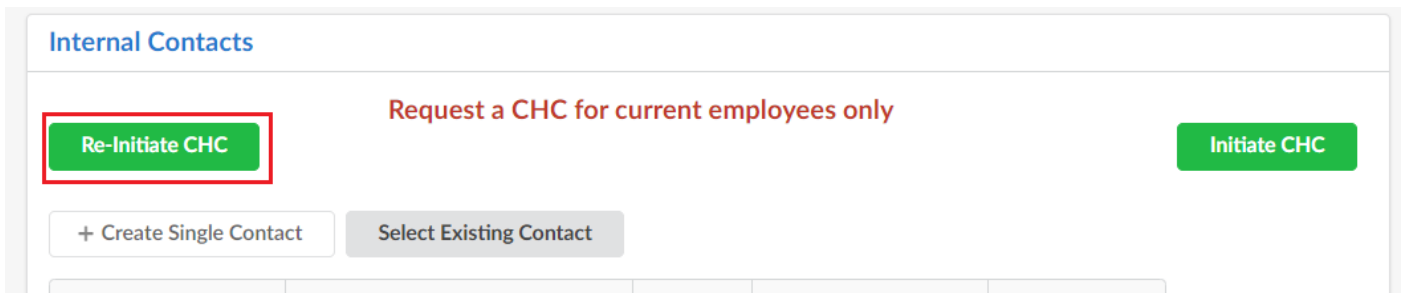
You can now click **Save & Close**, **Close**, or the X in the corner of the screen.

RENEWING AN EXPIRED CHC

When one of your staff members has a CHC about to expire, or that has expired, you will see a notification on your home page.



To re-initiate a CHC, select **Company Profile** from the left-hand menu, then **Contacts**. From the Contact screen, click **Re-Initiate CHC**.



From the next screen, select your contact and click **Notify**.

ADDING REQUIRED DOCUMENTS

From the left-side menu, click the **Documents & Certs** link.

Company Info discovery channel 2 (UNITED STATES / Colorado / Denver) Search

Save

Keywords Status Archived Documents

On-boarding Documents

Add On-boarding Documents

Att.	Type	Document Name	Validity begin date	Validity end date	Owner	Status
	W9 *					

1 Record(s)

MWBE Certifications

Add MWBE Certifications

0 Record(s)

Certifications

Add Certifications

0 Record(s)

Click the + icon next to the w9 document

On-boarding Documents

Add On-boarding Documents

Att.	Type	Document Name	Validity begin date	Validity end date	Owner	Status
	W9 *					

1 Record(s)

W9 documents are required for all vendors. Other documents may or may not be required based on the terms of your contract.

You may click in the *Document* box and browse for a document, or you may drag-and-drop the document from your computer. If you use drag-and-drop, make sure a green frame appears around the *Document* box before you “drop” the document.

Edit document : On-boarding Documents

Document

Save Save & Close Close Archive

Description

Type* On-boarding Documents / W9 Status Draft

Document Name Document* Begin Date*

Click or Drag to add a file Validity end date

+ Copy

Link to external document

Document's owner SHARK Hammerhead Validity

Follow up

Notification Date

Archive Date

Request Date

Comments

Add a comment here

Add the *Document Name* and enter the *Validity begin date*. Enter any additional information or comments.

Edit document : On-boarding Documents

Document

Save Save & Close Close Archive

Description

Type* On-boarding Documents / W9 Status Draft

Document Name W9 Begin Date* 4/27/2023

Document* Click or Drag to add a file Validity end date

W9.docx

Link to external document

Document's owner SHARK Hammerhead Validity

Follow up

Notification Date

Archive Date

Request Date

Comments

Add a comment here

Click **Save**.

You will now see a screen with **Cancel** and **Submit** buttons.

The screenshot shows a web application window titled "Edit document : On-boarding Documents". At the top right, there are window control icons (print, maximize, close). Below the title bar, there are five buttons: "Save" (blue), "Save & Close" (blue), "Close" (blue), "Cancel" (red), and "Submit" (green). To the right of these buttons is an "Archive" button (dark blue). The main content area is divided into three sections:

- Description:** Contains fields for "Type" (On-boarding Documents / W9), "Status" (Draft), "Document Name" (W9), "Begin Date" (4/27/2023), "Document*" (with a file upload icon and text "Click or Drag to add a file"), "Validity end date" (with a calendar icon), "Link to external document" (empty text box), and "Document's owner" (SHARK Hammerhead). There is also a "Validity" label.
- Follow up:** Contains three empty date input fields labeled "Notification Date", "Archive Date", and "Request Date".
- Comments:** A large text area with the placeholder text "Add a comment here" and a small edit icon at the bottom right.

If you have completed all required information and are ready to submit this document to Judicial, click **Submit**. If you have not completed all required information and would like to come back to complete later, click **Save & Close**.

If there is an issue with the document and you would like to delete it and start again, click **Cancel**.





Once you have submitted your document, you will see a confirmation message at the top of the window. Click **Save & Close** or the **X** in the upper right corner to close the dialog box.


This screenshot shows the same "Edit document : On-boarding Documents" window, but with a confirmation message displayed at the top. The message is a light blue box with a checkmark icon and the text "Data has been saved" and "Validated successfully". The "Status" field in the "Description" section is now "Approval in progress" (orange text). The "Save & Close" button is highlighted in a darker blue. The "Archive" button is also visible. The rest of the form fields and layout are identical to the previous screenshot.

You will note that the document status will show as an orange x.

On-boarding Documents

Add On-boarding Documents





Att.	Type	Document Name	Validity begin date	Validity end date	Owner	Status
  	W9	W9		4/27/2023	Hammerhead Shark	


1 Record(s) 

Once Judicial reviews and approves the document, the status will change to a green checkbox, indicating the document was approved. All required documents must be approved before your services or products can be purchased.



On-boarding Documents

Add On-boarding Documents

Att.	Type	Document Name	Validity begin date	Validity end date	Owner	Status
  	W9	W9		4/27/2023	Hammerhead Shark	

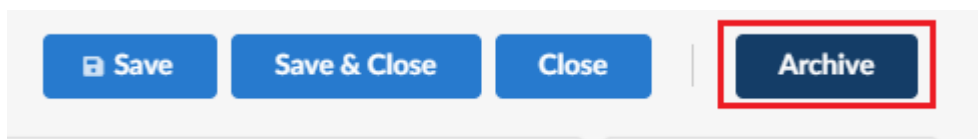
1 Record(s) 

If your document is rejected, the person who added the document will receive an email indicating why the document was rejected.

To archive a document, or to review the data entered, click the edit (pencil) icon  to the left of the document name. To download the document for viewing, click the document icon  to the left of the document name.

ARCHIVING DOCUMENTS

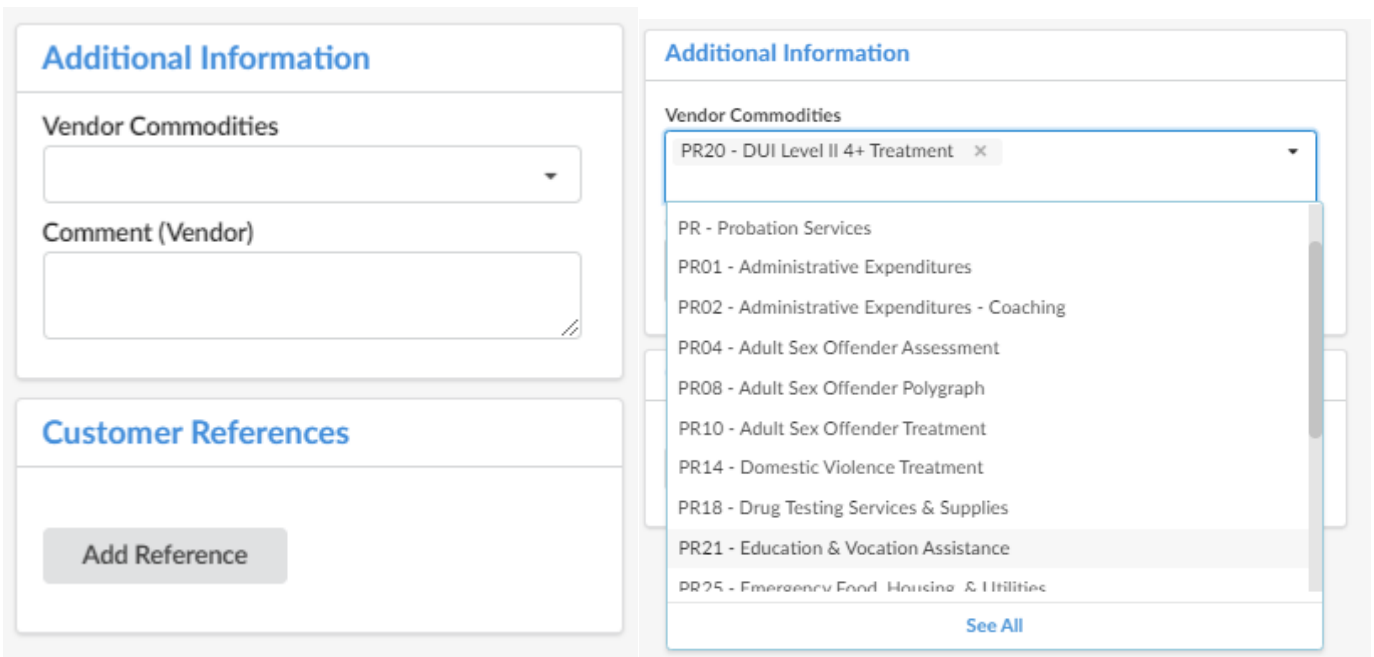
If you have a document that is no longer valid, you can archive it. When a document is archived, the validity end date is filled in with the current date and the document is removed from the list of available documents. Archiving is done by viewing the document information and clicking the **Archive** button. If the document is required, it will need to be re-submitted if the initial document is archived.



OPTIONAL: DECLARING YOUR QUALIFICATIONS

From the left-side menu, click the **Qualifications** link.

Qualifications list the districts and services and/or goods that you are approved to provide for Colorado Judicial. Colorado Judicial will add and update these for you based on your contract. If you wish to declare your suitability to provide additional goods and/or services, you may add them here.



MANAGING MULTIPLE LOCATIONS

In Forum, vendors are identified by their distinct physical location. Each location will have a distinct Forum Vendor ID. If you are a contact for multiple locations, you will see them in a drop down in the upper right corner of the screen. Select the location you wish to manage from the list.

