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
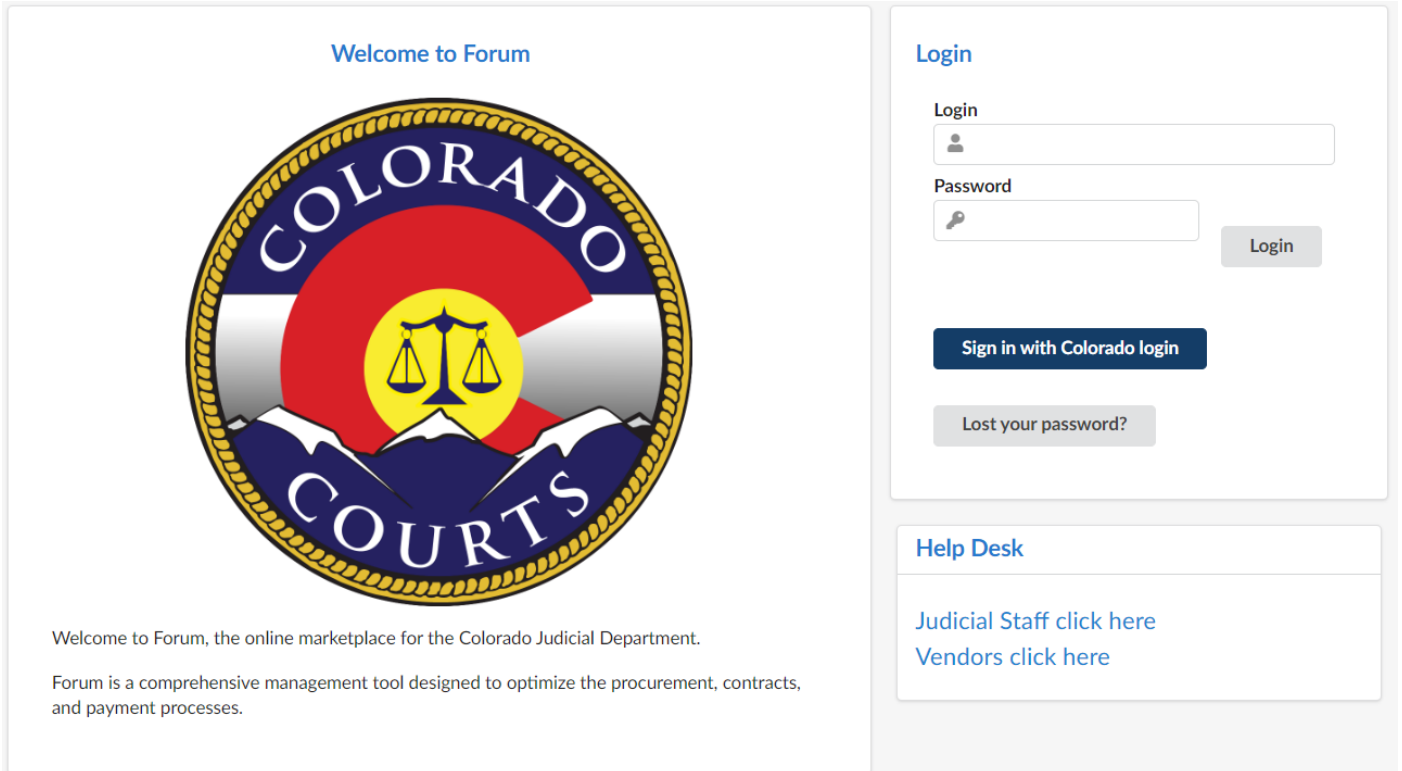
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LOGGING ON TO FORUM

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.

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 **Acknowledge** 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.

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

2. Click the **Confirm** 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.

This will take you to the Forum page of the Colorado Judicial Branch website. Scrolling down you will see sections for pre-recorded training videos and training documents

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

Pre-recorded Vendor Training Sessions

Registering and Onboarding for Vendors →   Reviewing and Approving Contracts →   Order Review and Acknowledgement →

Creating and Submitting an Invoice →

Forum Training Documents

Registering and Onboarding in Forum →   Navigating Forum →   Orders and Invoices in Forum →

Reviewing and Approving Contracts in Forum →   FAQ →   Change Default Browser →

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.

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

Save | Request Information Change

Contact is different from Suitable
HC status

	Position	Role		Contact status
t.com			✖ ▾	Active

Client Contacts

Contact ⇕	Email ⇕	First Name ⇕	Last Name ⇕
ADMIN - Probation ADMIN	PA@cjdadmin.com	ADMIN - Probation	Admin

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.

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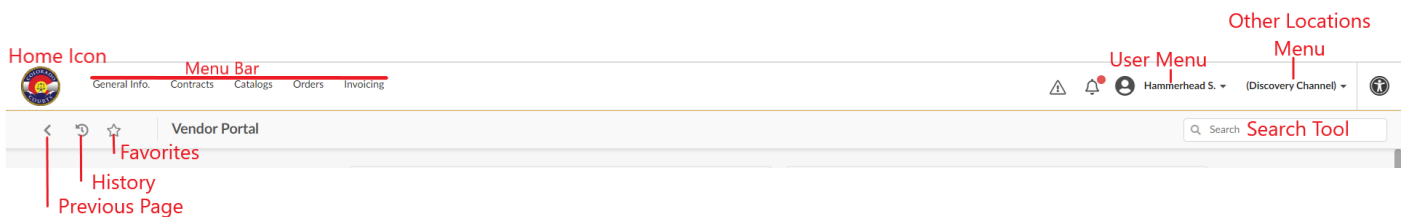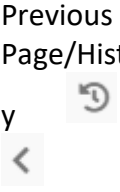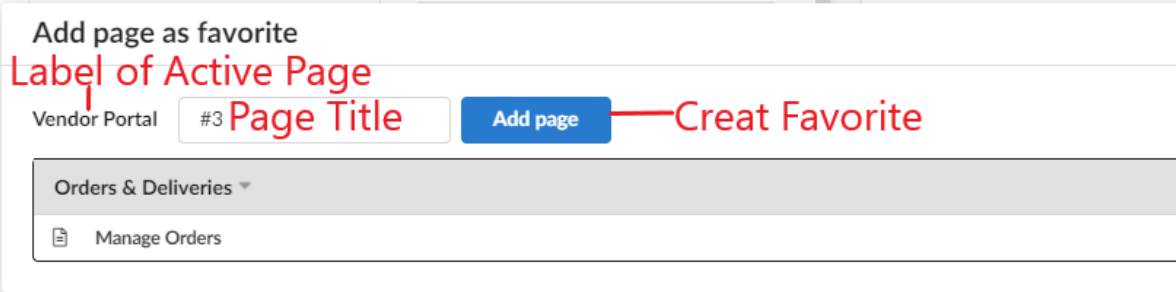
HOMEPAGE TOUR
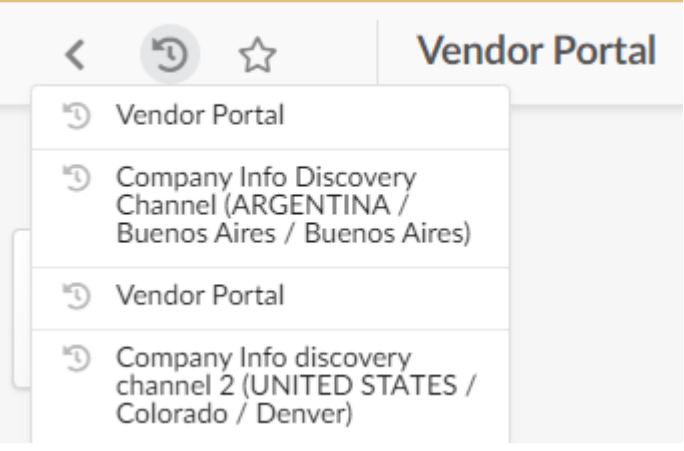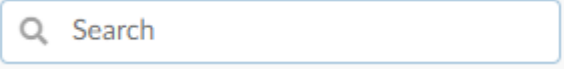
Once logged on to Forum, you will access your home page. This page allows you to manage your company information, view Judicial orders, create invoices, and add your catalog items or services to Forum.
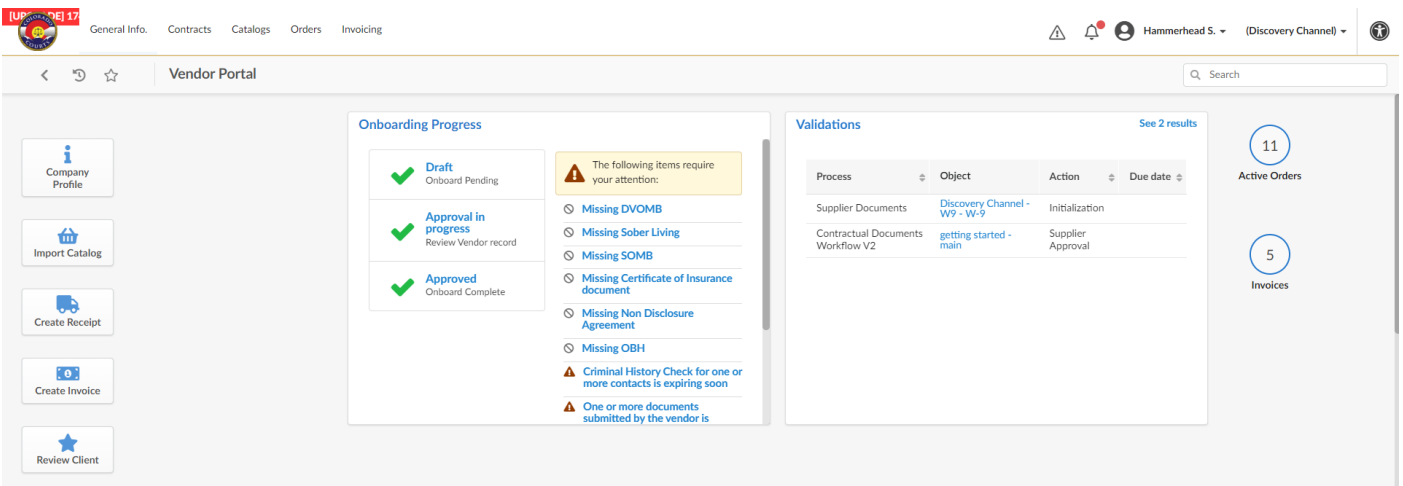

NAVIGATION AND ACCESS

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	Quick search searches the keywords entered across the entire site to give you quick, direct access to invoices, contract, client name, etc.
	Hover your mouse over the text input box to display user assistance on the appropriate keywords and syntax for this tool.
Favorites	Favorites management
	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.
	On a page that has already been saved as a favorite, the Star icon will be yellow ⭐ .
	Use the edit ✏ or delete 🗑 icons to edit or delete a favorite.

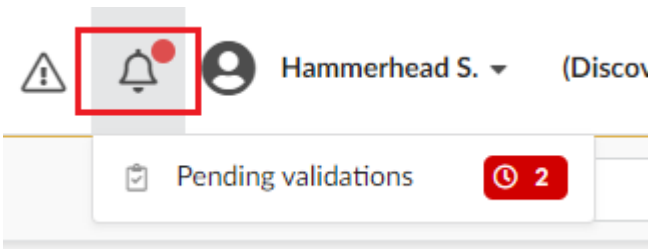## USER OPTIONS MENU

On the upper right side of the Forum window will display your username. Clicking on your username presents the following options:
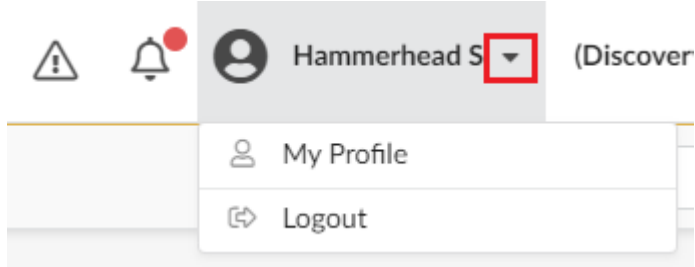
MENU OPTION	DESCRIPTION	MORE INFORMATION ON PAGE:
My Profile	View your Account Profile and Preferences	10
Logout	Click to exit Forum	

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.	12

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 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:
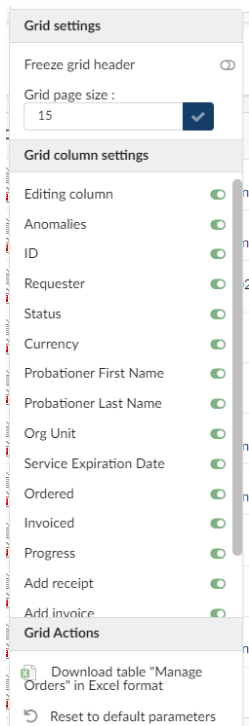

Showing/Hiding columns: Select/Unselect a column label's checkbox in the menu to show/hide the column in the results list.

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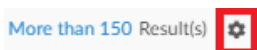
These functions can also be accessed by clicking the gear icon in the lower right corner of the grid.

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:
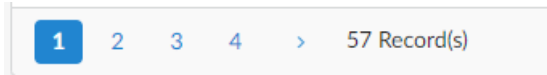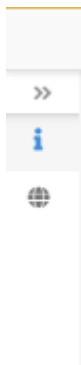

To maximize performance, the number of displayed results is limited to 150 by default. When found results exceed this limit, the number of results indicates: +150 Results. Click this link to access the full number of results.
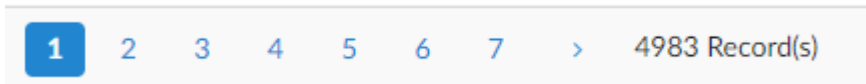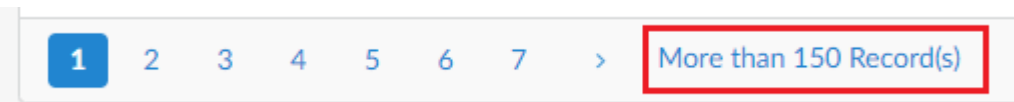


DATA RECORD PAGES

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.
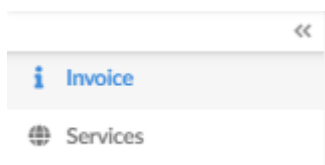
You may navigate from one tab to the other without losing unsaved data. However, you must save the data you wish to keep before leaving the page; to save all tabs at once, use the **Save** or **Save and close** buttons.
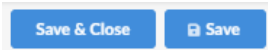
To save a page, you must first fill in the required fields, these are marked with a red asterisk *****. If you try to save a page when required fields have not been filled out, the field will turn red and alerts will appear at the top of the page.

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.

IDENTITY

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

PASSWORD

Use the Password section to update your password.

MY PENDING VALIDATIONS

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