

# FORUM FAQ

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

This document provides quick answers on the most frequently asked questions about Forum.

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## LOGGING ON TO FORUM

All Judicial Vendors will be invited to join Forum via email sent from [noreply@ivalua.com](mailto: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 **Submit**.

## FIRST USE: ACCEPTING TERMS & CONDITIONS

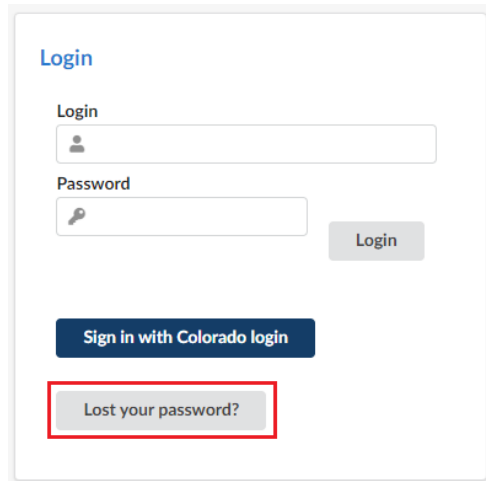
If you are logging on to Forum for the first time, you must review and accept the Terms & Conditions of Use.

You should review the Terms & Conditions, then select the checkbox **I accept terms and conditions** and click **Validate** to access the system. If you are unable to accept the terms and conditions, please contact the help desk.

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## FORGOT YOUR PASSWORD?

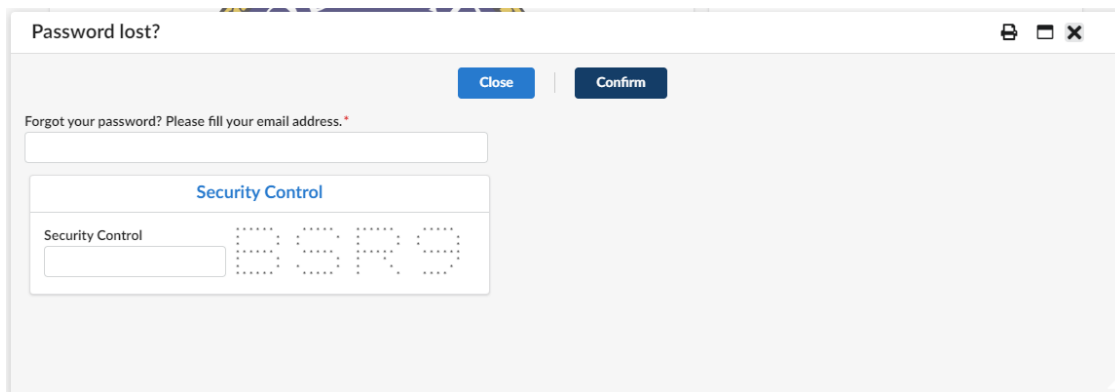
If you should lose your **login password**, you can request a new temporary password from the *Login* frame.



The screenshot shows a 'Login' form with the following elements:

- Header: Login
- Field: Login (with a person icon)
- Field: Password (with a key icon)
- Button: Login
- Button: Sign in with Colorado login
- Link: Lost your password? (highlighted with a red box)

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



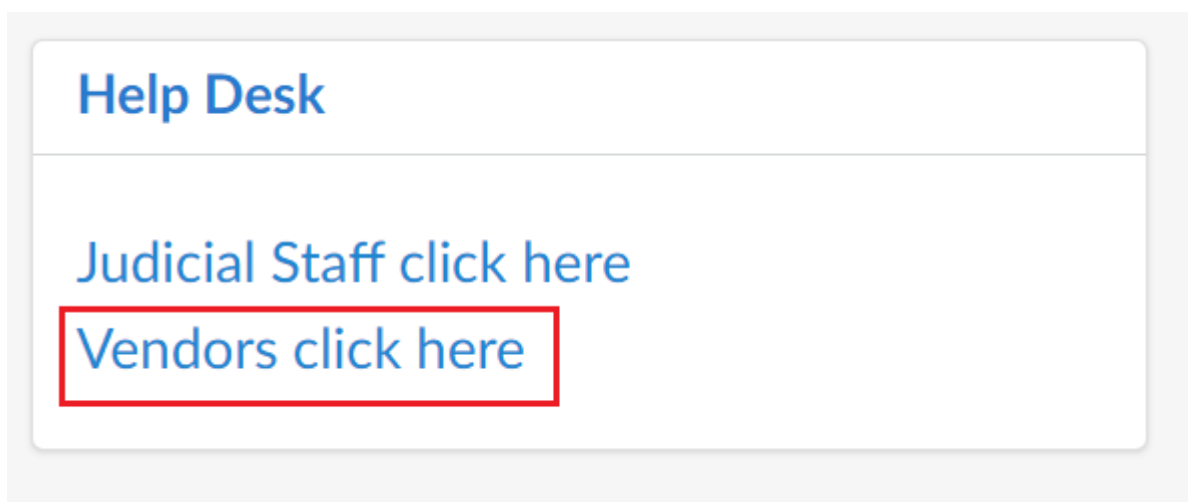
The screenshot shows a 'Password lost?' dialog box with the following elements:

- Buttons: Close, Confirm
- Text: Forgot your password? Please fill your email address.\*
- Field: Email address
- Section: Security Control
- Field: Security Control (with a captcha image showing 'BSR9')

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.



The screenshot shows a 'Help Desk' section with the following elements:

- Header: Help Desk
- Text: Judicial Staff click here
- Text: Vendors click here (highlighted with a red box)

This will bring you to the Forum page of the Colorado Judicial Branch website. Here you can find prerecorded training videos, training documents, and a link to a document which shows Judicial contracts by district.

## Forum

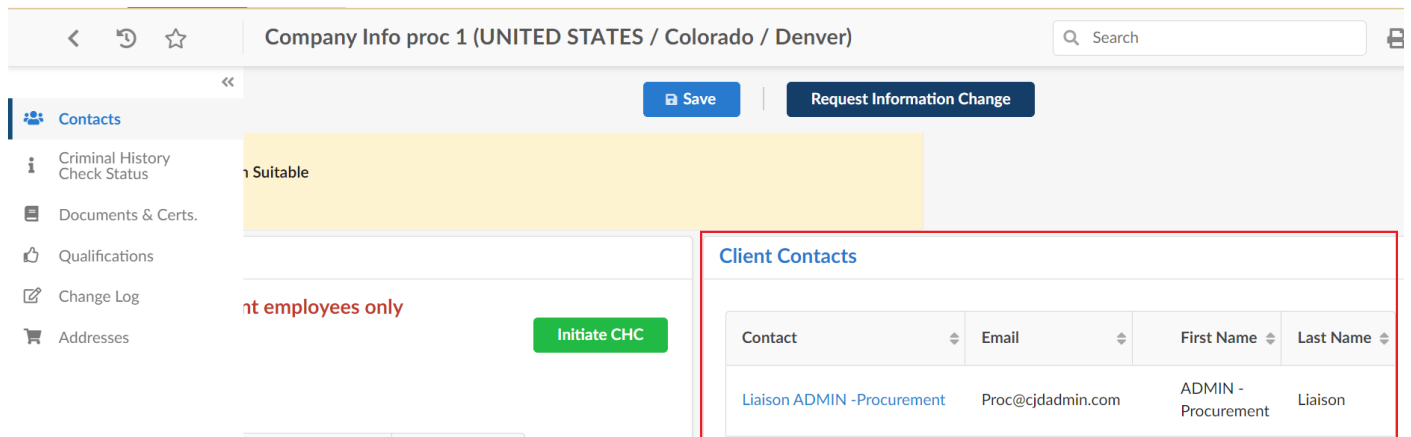
Forum is a dedicated tool for collaborative management of Judicial spend and allows users to access the life cycle of the procurement process. This includes the ability to request and manage contracts, place orders, receive order confirmations and invoices and approve payments. The system also allows 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](#)



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.



## 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.

My Profile  
Logout

MENU OPTION	DESCRIPTION	MORE INFORMATION ON PAGE:
My Profile	View your Account Profile and Preferences	5
My pending validations	Shows items that you must act on as part of an approval process.	6
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**

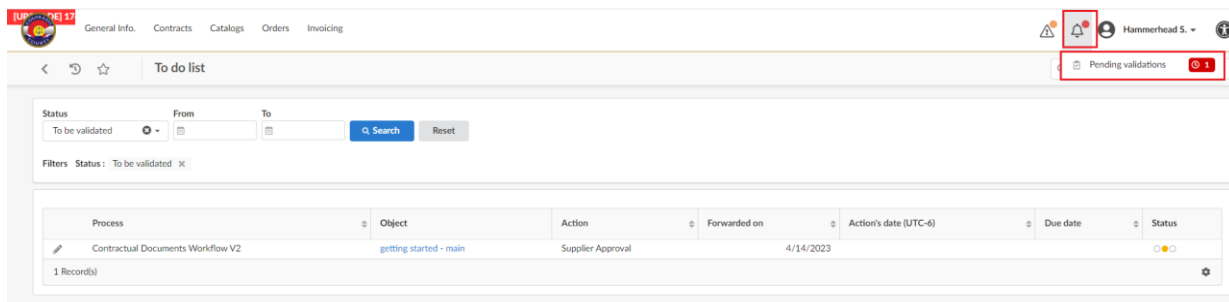
**Position ⓘ**

**Supplier**

**Daily Working Time (hours)**

## MY PENDING VALIDATIONS

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.




General Info Contracts Catalogs Orders Invoicing

Hammerhead 5. -

To do list

Pending validations 1

Status: To be validated

Process	Object	Action	Forwarded on	Action's date (UTC-6)	Due date	Status
 Contractual Documents Workflow V2	getting started - main	Supplier Approval	4/14/2023			To be validated

1 Record(s)

## 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.

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

**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		Account Manager Accounting CEO Default Contact Sales	Active
shark whale				Active

## ADDING NEW USERS

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

**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		Default Contact Vendor admin	Active
shark whale				Active

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**.

Supplier Contact Management 🖨️ 🗑️ ✕

Save Save & Close Close

### Identity

Middle Name   
 Position ⓘ   
 List of languages  
 English ⓘ

### Login Information

### Phone

Phone   
 Cell Phone   
 Fax

### Photo

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 <span>✕</span> ⓘ	Active
Shark Hammerhead	hammerhead@oldshark.com		Default Contact <span>✕</span> ⓘ Vendor admin <span>✕</span>	Active
shark new			<span>✕</span> ⓘ	Active
shark whale			<span>✕</span> ⓘ	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.



## COMPLETING CRIMINAL HISTORY CHECK (CHC)

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

Company Info Discovery Channel (ARGENTINA / Buenos Aires / Buenos Aires)

Save

- Missing Sober Living
- Missing Certificate of Insurance document
- Missing OBH
- Please submit the missing mandatory document(s) from associated contract(s) : Certificate of Insurance, OBH, Sober Living
- Criminal History Check for Vendor Contact is different from Suitable
- No Vendor Contact have a Valid CHC status
- Change request in progress


Request a CHC for current employees only

First Name	Middle Name	Last Name	Criminal History Check Status	Start Validity Date	End Validity Date
Bull		Shark	Required		
Hammerhead		Shark	Required		
whale		shark	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 Home Page  - Criminal History Check for Vendor Contact is different from Suitable

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

### RENEWING AN EXPIRED CHC

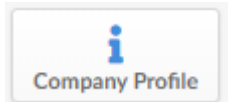
When one of your staff members has a CHC about to expire, or that has expired, you will see a notification on your home page.

**Onboarding Progress**

- ✓ **Draft**  
Onboard Pending
- ✓ **Approval in progress**  
Review Vendor record
- ✓ **Approved**  
Onboard Complete

⚠ The following items require your attention:

⚠ **One or more contacts have an expired CHC status**



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

The screenshot shows the 'Contacts' screen with a left-hand menu and a main content area. The main content area has a yellow alert banner with several error messages. Below the banner is the 'Internal Contacts' section, which includes a 'Request a CHC for current employees only' heading and two buttons: 'Re-Initiate CHC' (highlighted in red) and 'Initiate CHC'. There are also buttons for '+ Create Single Contact' and 'Select Existing Contact'. A table lists four contacts with columns for Contact, Login, Position, Role, and Contact status.

Contact	Login	Position	Role	Contact status
Shark Bull	bull.shark@ismean.com		Vendor admin	Active
Shark Hammerhead	hammerhead@oldshark.com		Default Contact Vendor admin	Active
shark new				Active
shark whale				Active

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

The screenshot shows the 'Re-Initiate CHC' dialog box. At the top right are icons for print, close, and refresh. Below are three buttons: 'Save', 'Save & Close', and 'Close'. The 'User' field is highlighted in red and contains 'Shark Bull'. Below the field is a green 'Notify' button.

After clicking **Notify** a green alert will appear, confirming the notification has been sent.

Re-Initiate CHC

Save Save & Close Close

✓ notify\_chc\_contacts

User

Shark Bull

Notify

## ADDING REQUIRED DOCUMENTS

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

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

Save Request Information Change

Add On-boarding Documents

Att.	Type	Document Name	Validity begin date	Validity end date	Owner	Status
	Non Disclosure Agreement *					
	Certificate of Insurance *					
	W-9	W-9	4/13/2023		Hammerhead Shark	

3 Record(s)

MWBE Certifications

Add MWBE Certifications

0 Record(s)

Certifications

Add Certifications

Att.	Type	Document Name	Validity begin date	Validity end date	Owner	Status
	OBH *					
	SOMB *					
	DVOMB *					
	Sober Living *					

4 Record(s)

Select the document type you want to upload.

Att.	Type	Document Name	Validity begin date	Validity end date	Owner	Status
	Non Disclosure Agreement *					
	Certificate of Insurance *					
	W9	W-9		4/13/2023	Hammerhead Shark	

Att.	Type	Document Name	Validity begin date	Validity end date	Owner	Status
	OBH *					
	SOMB *					
	DVOMB *					
	Sober Living *					

W9 documents are required for all vendors. Other documents may or may not be required based on the terms of your contract. If a Non-Disclosure Agreement or a Certificate of Insurance is required, they will be added in the On-boarding Documents section.

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.

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

Edit document : On-boarding Documents

Close Save Save & Close Archive

**Description**

Type: On-boarding Documents / W9 Status: Draft

Supplier: ryan's test vendor Validity: Validity begin date: 11/20/2023

Document Name: W9 Validity end date:

Owner: ZIEHR Ryan Supplier Status: Approved

Document: Adding and Onboarding Vendors in Forum (1).docx

Link to external document:

**Follow up**

Validation Date:

Notification Date:

Archive Date:

Request Date:

**Comments**

Add a comment here

Click **Save**.

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

Edit document : On-boarding Documents

Close Save Save & Close Cancel Submit Archive

**Description**

Type: On-boarding Documents / W9 Status: Draft

Supplier: ryan's test vendor Validity: Valid

Document Name: W9 Validity begin date: 11/20/2023

Owner: ZIEHR Ryan Validity end date:

Document: Adding and Onboarding Vendors in Forum (1).docx Supplier Status: Draft

Link to external document:

**Follow up**

Validation Date:

Notification Date:

Archive Date:

Request Date:

**Comments**

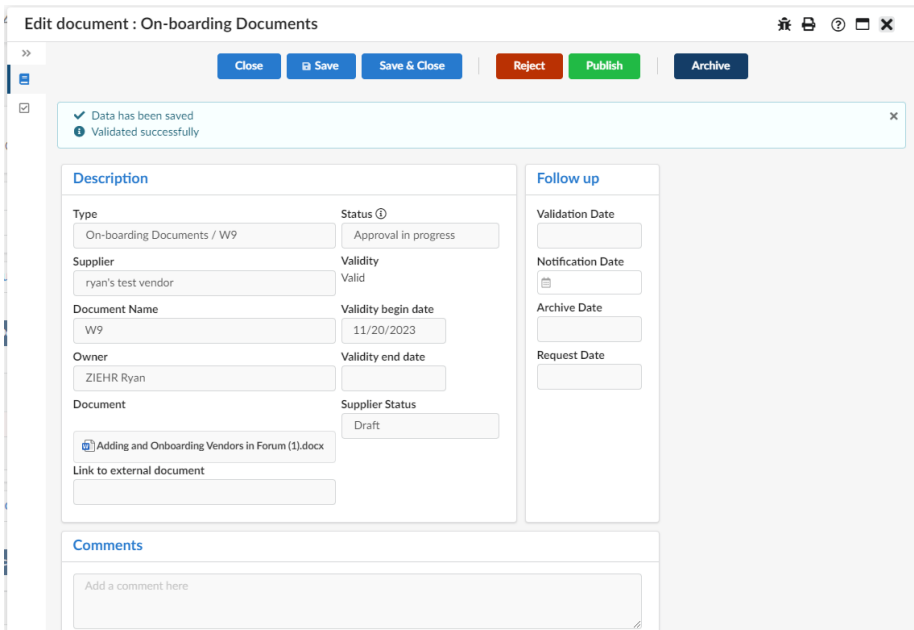
Add a comment here

Tracking

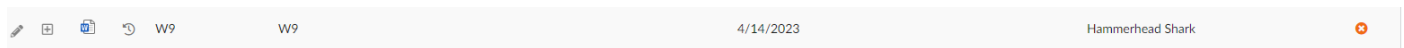
If you have completed all required information and are ready to submit this document to Judicial, click **Submit**. If you have not completed all required information and would like to come back to complete later, click **Save & Close**.

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 screen. Click **Save & Close** or the **X** in the upper right corner to close the dialog box.



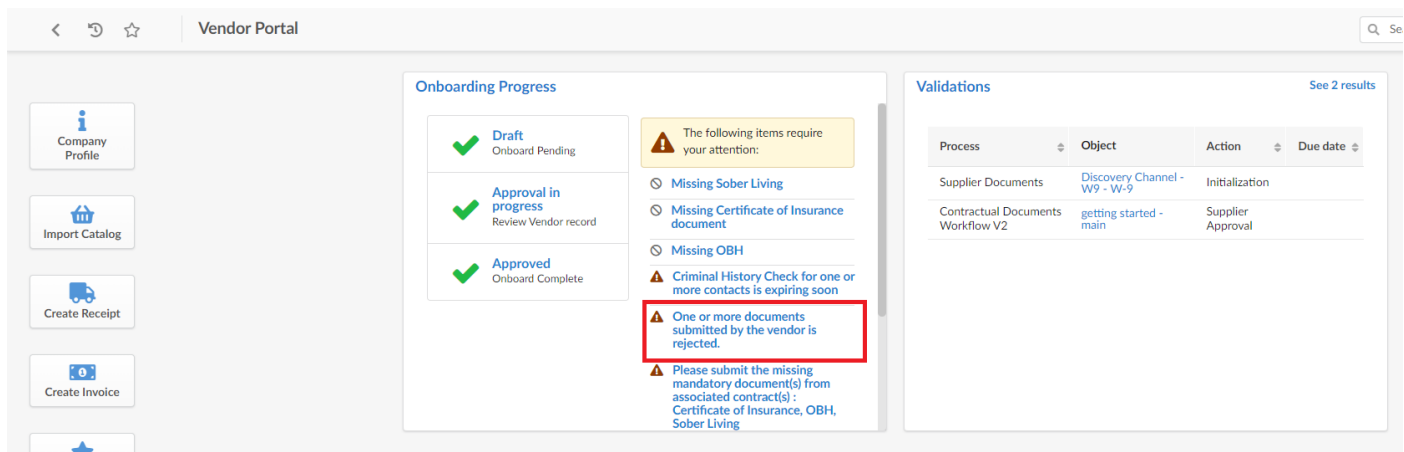
You will note that the document status will show as an orange x.



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.



If your document is rejected, the person who added the document will receive an email indicating why the document was rejected. The user will also see a notification in the Onboarding Progress section of the Vendor Portal.



To archive a document, or to review the data entered, click the edit (pencil) icon to the left of the document name. Then click the Archive button.

Edit document : On-boarding Documents

Document

Save Save & Close Close Cancel Submit Archive

Description

Type: On-boarding Documents / W9 Status: Non-compliant

Document Name: W-9 Begin Date: 4/13/2023

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





To download the document for viewing, click the document icon  to the left of the document name.



Other certifications such as DVOMB, OBH, Sober Living, and SOMB are uploaded using the same process described above but are added to the Certifications section and not the On-boarding Documents section.

On-boarding Documents

Add On-boarding Documents

Att.	Type	Document Name	Validity begin date	Validity end date	Owner	Status
  	W9	W-9		4/13/2023	Hammerhead Shark	

1 Record(s)

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MWBE Certifications

Add MWBE Certifications

0 Record(s)

---

Certifications

Add Certifications

0 Record(s)

## 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.





## 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.

**Additional Information**

**Vendor Commodities**

JV14 - JV14 CYDC - Domestic Violence Treatment

**Comment (Vendor)**

**Customer References**

Add Reference

**Additional Information**

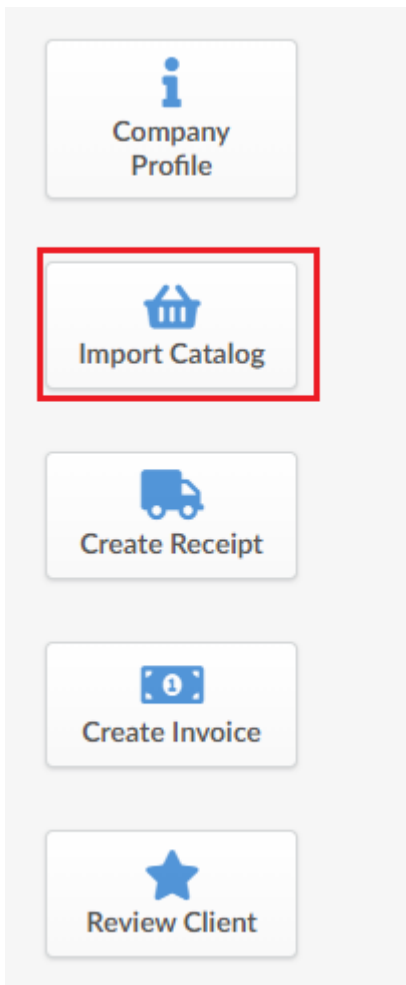
**Vendor Commodities**

- JV14 - JV14 CYDC - Domestic Violence Treatment
- G2 - G2 Goods
- IT01 - IT Goods
- IT02 - IT Services
- JV01 - JV01 CYDC - Administrative Expenditures
- JV18 - JV18 CYDC - Drug Testing Services & Supplies
- JV21 - JV21 CYDC - Education & Vocation Assistance
- JV25 - JV25 CYDC - Emergency Food, Housing, & Utilities
- JV32 - JV32 CYDC - General Medical & Dental Assistance
- JV36 - JV36 CYDC - Incentives / Reinforcements For Offenders
- JV40 - JV40 CYDC - Juvenile Sex Offender Assessment

[See All](#)

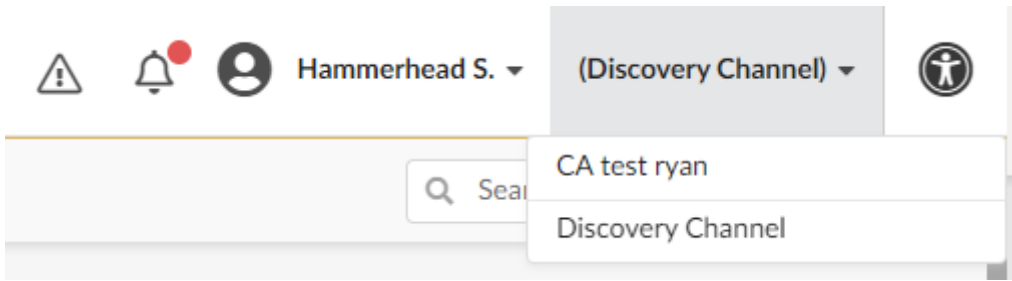
## LOADING YOUR CATALOG

From the Home Page, click the **Import Catalog** link.



## 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.



**NOTE: You must be assigned the Vendor Admin role to manage multiple locations.**