

FORUM UPGRADE

NEW FEATURES FOR SUPPLIERS

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

In September Forum will be upgraded from version 8.174 to version 8.182. This document features new functionality for suppliers provided by this upgrade.

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WHY UPGRADE?



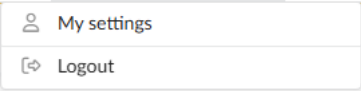
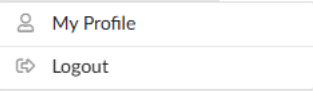
This upgrade will provide several benefits, including:

- Adding user enhancements which are described in this document.
- Keeping our software aligned with the latest security standards and updates.
- Maximizing compatibility with other software platforms such as Office 365.

You do not need to change any of your current contracting, order intake, or invoicing processes because of this upgrade. Current processes, functionality and menus will be retained.

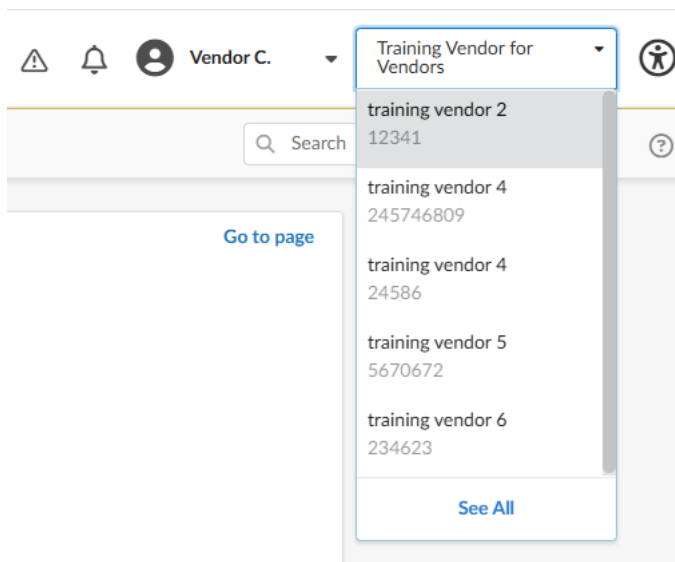
USER INTERFACE

NAME CHANGES

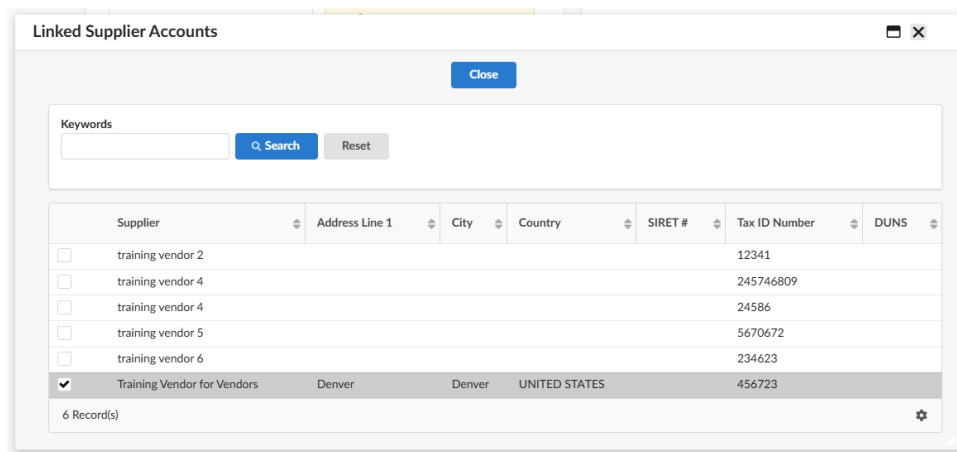
Section	Change	After Upgrade	Before Upgrade	Impact
Invoice Records	Linked Invoice (credit) is now Linked Invoice			No Impact. While this field is visible it is not used in the standard invoicing process
User Settings	My Profile is now called My settings			No Impact. All settings that were previously under the My Profile section are now under the My settings section

CHANGING VENDOR LOCATIONS

For vendors that are assigned to multiple locations, the dropdown to the right of their name has changed. When clicking the dropdown, the results will be similar to other dropdowns in the system with a scroll bar.



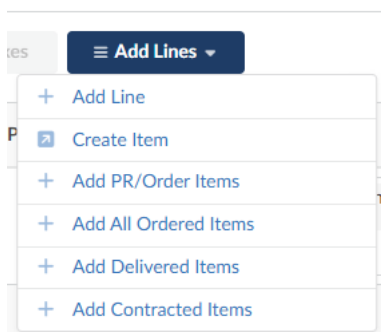
Clicking See All will show all vendor locations assigned to your account and allow you to select which location to change to.



INVOICES

ADD LINES ON INVOICES

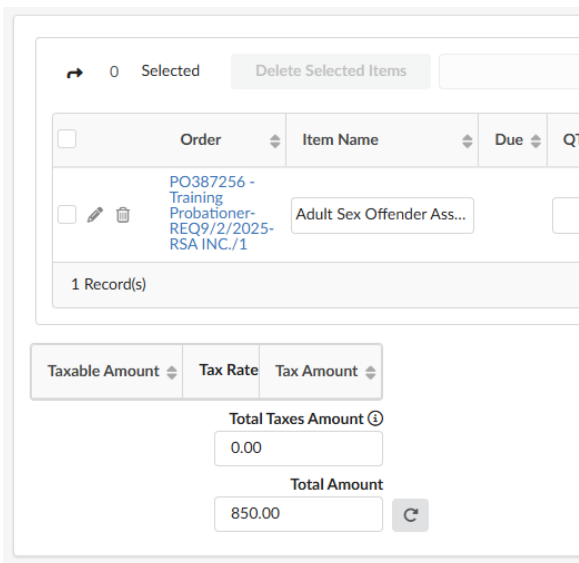
When adding items to an invoice the Add Lines dropdown now has more options.



Add PR/Order Items and Add All Ordered Items retain their same function and are the only options that should be used. All other options are only to be used by Judicial users.

MOVED INVOICE TOTAL

On Invoices the totals in the Items section has moved from the right side of the screen to the left side. This will help reduce the amount of scrolling needed to view all relevant information on an invoice.



Order	Item Name	Due	Q1
PO387256 - Training Probationer-REQ9/2/2025-RSA INC./1	Adult Sex Offender Ass...		

1 Record(s)

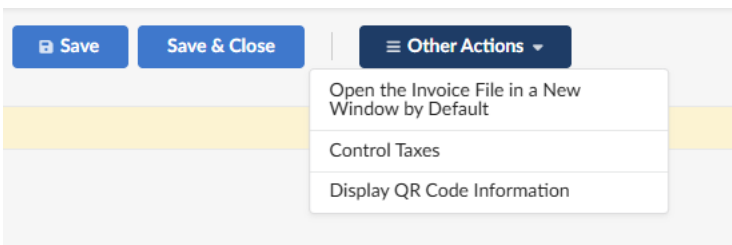
Taxable Amount Tax Rate Tax Amount

Total Taxes Amount 0.00

Total Amount 850.00

VIEWING INVOICE LEGAL DOCUMENT

By default when opening an invoice which has a legal invoice document uploaded, the document will show on the right side of the screen. With this update under the Other Actions button the “Open the Invoice File in a New Window by Default” option is available.

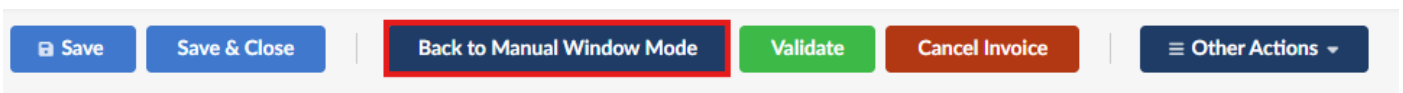


Save Save & Close Other Actions

- Open the Invoice File in a New Window by Default
- Control Taxes
- Display QR Code Information

Clicking this will open the document in a new tab. After selecting this option, when opening an invoice where a legal invoice document was uploaded two tabs will open, one for the standard invoice view and one for the uploaded document.

To revert this change you can click “Back to Manual Window Mode”.



Save Save & Close Back to Manual Window Mode Validate Cancel Invoice Other Actions

MY SETTINGS

Previously when clicking on My Profile all settings were on the General Preferences page. After the upgrade these settings will be split between three pages when you click on My settings.

PROFILE

This page contains options to update your name, the email address Forum will send notifications to, and your password.

GENERAL PREFERENCES

This page contains accessibility settings as well as language and time zone settings.

NOTIFICATIONS

This page contains information about frequency you will receive notifications. At this time vendors do not have the ability to change the frequency they receive notifications. After the upgrade you will still receive all notifications as you did before the upgrade