COI Training Guide
Vendor Actions

Sample
2024

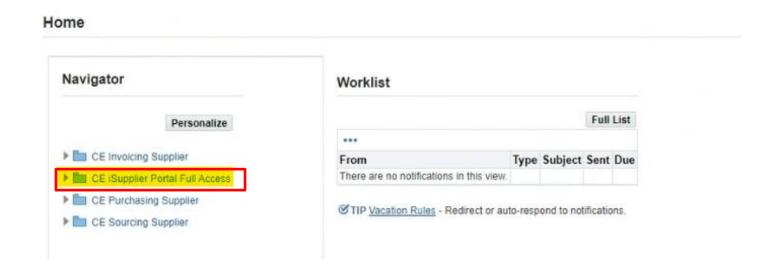# Vendor: Certificate of Insurance (COI) Upload

Overview of Steps – *Upload & Review Certificate of Insurance (COI)*

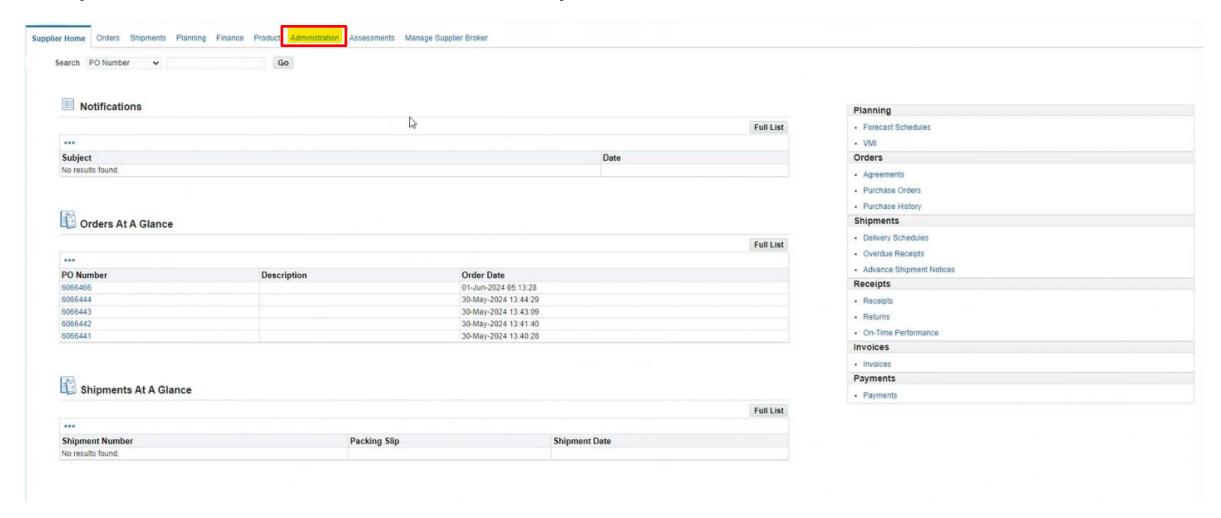| **Purpose**: Vendor will go directly to Oracle to upload their Certificate of Insurance (COI) |
|---|

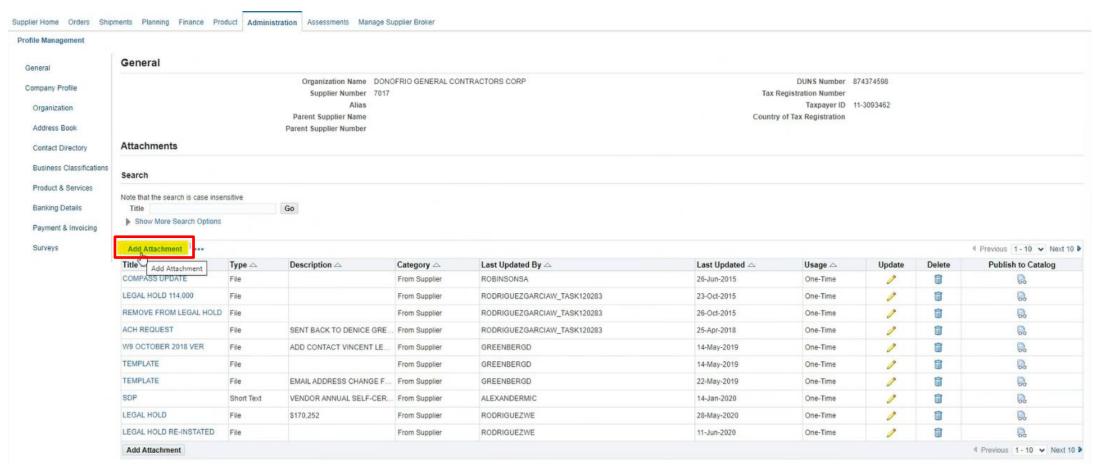| **Steps – Add Certificate of Insurance [Vendor]**	
1	Vendor Log into Oracle and select "CE iSupplier Portal Full Access" under Navigator.
2	Select "Administration" option in ribbon.
3	Select "Add Attachment" button under search bar.
4	Enter the Title using the correct naming convention: "COI | EXP MM-DD-YYYY | $# | ####".
5	Select "Choose file" to add COI attachment.
6	Select "Apply" and confirmation of attachment will appear
Steps - Review and Approve Certificate of Insurance (COI) [TPO]	
7	TPO Log into Oracle and select "CE SMG Team Member" under Navigator.
8	Select "Entry" under CE SMG Team Member.
9	Enter Supplier's name under "Simple Search" & Click "Go".
10	Select "Company Profile" and scroll to the bottom to see the attachments.
11	Enter "COI" on the search bar to filter out COI attachments and select desired vendor's COI.
12	Select delete icon if vendor's COI is to be removed.
13	Select "Yes" to delete vendor's COI.

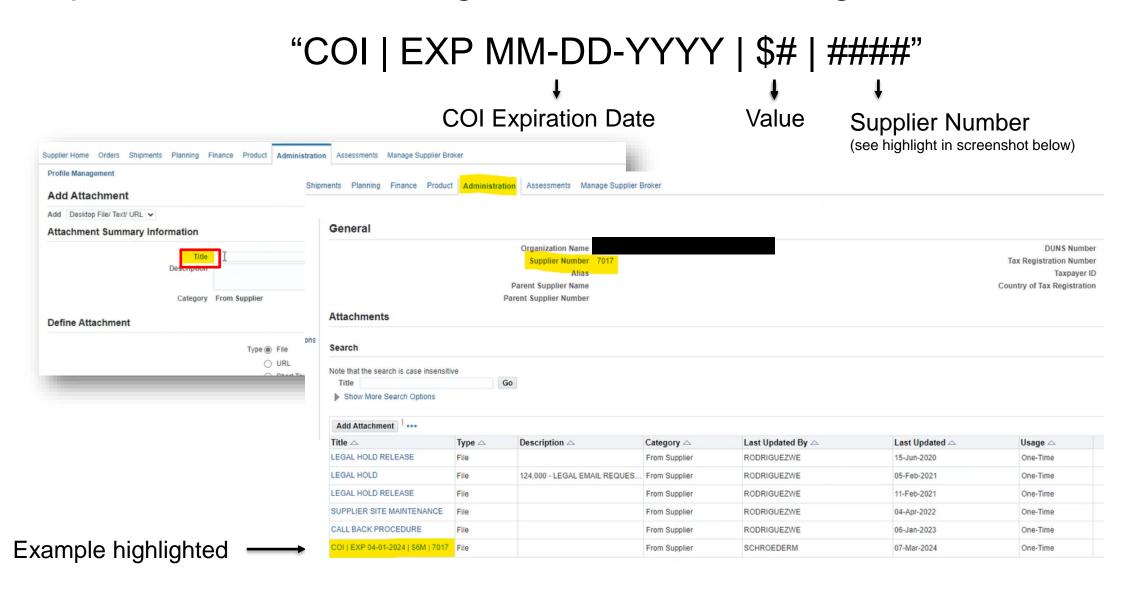# Step 1: Vendor Log into Oracle and select "CE iSupplier Portal Full

Step 2: Select "Administration" option in ribbon.

Step 3: Select "Add Attachment" button under search bar

Step 4: Enter the Title using the correct file naming convention:

"COI | EXP MM-DD-YYYY | $# | ####"

COI Expiration Date   Value   Supplier Number
(see highlight in screenshot below)

Example highlighted →

INTERNAL

Step 5: Select "Choose file" to add COI attachment

Define Attachment

Type ⦿ File   [Choose File] No file chosen

◯ URL

◯ Short Text

◯ Long Text

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Step 6: Select "Apply" and confirmation of attachment will appear