



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

Home

Navigator

Personalize

- CE Invoicing Supplier
- CE iSupplier Portal Full Access**
- CE Purchasing Supplier
- CE Sourcing Supplier

Worklist

Full List

...

| From | Type | Subject | Sent | Due |
|--|------|---------|------|-----|
| There are no notifications in this view. | | | | |

TIP [Vacation Rules](#) - Redirect or auto-respond to notifications.

Step 2: Select “Administration” option in ribbon.

Supplier Home | Orders | Shipments | Planning | Finance | Products | **Administration** | Assessments | Manage Supplier Broker

Search PO Number

Notifications

Full List

| Subject | Date |
|-------------------|------|
| No results found. | |

Orders At A Glance

Full List

| PO Number | Description | Order Date |
|-----------|-------------|----------------------|
| 6066466 | | 01-Jun-2024 05:13:28 |
| 6066444 | | 30-May-2024 13:44:29 |
| 6066443 | | 30-May-2024 13:43:09 |
| 6066442 | | 30-May-2024 13:41:40 |
| 6066441 | | 30-May-2024 13:40:28 |

Shipments At A Glance

Full List

| Shipment Number | Packing Slip | Shipment Date |
|-------------------|--------------|---------------|
| No results found. | | |

Planning

- Forecast Schedules
- VMI

Orders

- Agreements
- Purchase Orders
- Purchase History

Shipments

- Delivery Schedules
- Overdue Receipts
- Advance Shipment Notices

Receipts

- Receipts
- Returns
- On-Time Performance

Invoices

- Invoices

Payments

- Payments

Step 3: Select “Add Attachment” button under search bar

Supplier Home Orders Shipments Planning Finance Product Administration Assessments Manage Supplier Broker

Profile Management

- General
- Company Profile
- Organization
- Address Book
- Contact Directory
- Business Classifications
- Product & Services
- Banking Details
- Payment & Invoicing
- Surveys

General

Organization Name DONOFRIO GENERAL CONTRACTORS CORP
 Supplier Number 7017
 Alias
 Parent Supplier Name
 Parent Supplier Number

DUNS Number 874374598
 Tax Registration Number
 Taxpayer ID 11-3093462
 Country of Tax Registration

Attachments

Search

Note that the search is case insensitive
 Title

Add Attachment ***

| Title | Type | Description | Category | Last Updated By | Last Updated | Usage | Update | Delete | Publish to Catalog |
|------------------------|------------|----------------------------|---------------|-----------------------------|--------------|----------|--------|--------|--------------------|
| COMPASS UPDATE | File | | From Supplier | ROBINSONSA | 26-Jun-2015 | One-Time | | | |
| LEGAL HOLD 114.000 | File | | From Supplier | RODRIGUEZGARCIAW_TASK120283 | 23-Oct-2015 | One-Time | | | |
| REMOVE FROM LEGAL HOLD | File | | From Supplier | RODRIGUEZGARCIAW_TASK120283 | 26-Oct-2015 | One-Time | | | |
| ACH REQUEST | File | SENT BACK TO DENICE GRE... | From Supplier | RODRIGUEZGARCIAW_TASK120283 | 25-Apr-2018 | One-Time | | | |
| W9 OCTOBER 2018 VER | File | ADD CONTACT VINCENT LE... | From Supplier | GREENBERGD | 14-May-2019 | One-Time | | | |
| TEMPLATE | File | | From Supplier | GREENBERGD | 14-May-2019 | One-Time | | | |
| TEMPLATE | File | EMAIL ADDRESS CHANGE F... | From Supplier | GREENBERGD | 22-May-2019 | One-Time | | | |
| SDP | Short Text | VENDOR ANNUAL SELF-CER... | From Supplier | ALEXANDERMIC | 14-Jan-2020 | One-Time | | | |
| LEGAL HOLD | File | \$170,252 | From Supplier | RODRIGUEZWE | 28-May-2020 | One-Time | | | |
| LEGAL HOLD RE-INSTATED | File | | From Supplier | RODRIGUEZWE | 11-Jun-2020 | One-Time | | | |

Step 5: Select “Choose file” to add COI attachment

Define Attachment

Type File URL Short Text Long Text

Choose File No file chosen

[Empty text area]

Step 6: Select “Apply” and confirmation of attachment will appear

