



Insurance (Non-Railroad) QRG

1. From the Dashboard, select "Vendor" from the Reference Data.
2. On the Vendor Overview screen, use the search to filter the list by Vendor ID or Vendor Name if desired. Click on the blue hyperlink for the Vendor ID.
3. The Vendor Summary page will populate with the selected vendor. On the left side, select the 'Insurance' component tab. This page displays all the insurance for the selected Vendor.
4. To add a new insurance record, click on the "New" button.
 - a. A new row will generate at the bottom of the list.
 - b. Enter the appropriate information.
 - c. Click on the "Save" button near the top right of the page in the blue component header.
5. To modify or review an existing record, click on the expand carrot at the left side of the appropriate row.
 - a. If modifying a record, make the necessary changes.
 - b. Click on the "Save" button near the top right of the page in the blue component header.