

Online EDS 2.0

Cheat Sheet for External Users

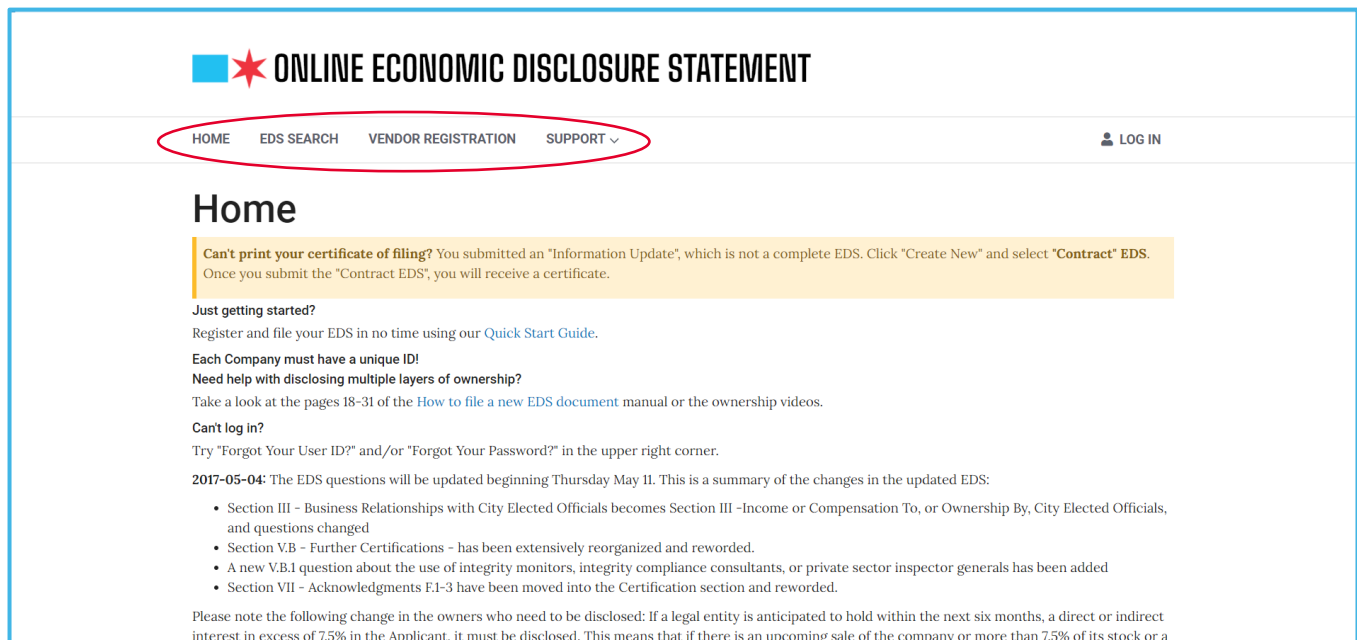
Welcome to EDS 2.0!

The Online Economic Disclosure Statement (EDS) system has been upgraded and modernized. In addition to technical infrastructure modernization, the upgraded system includes:

- 1) Improved look and feel
- 2) Upgraded user interface (UI) for greater intuitiveness and ease of use
- 3) Streamlined processes

Otherwise, the Online EDS system is the same system that you have been using for so many years, just better and easier to use!

Improved User Interface



- Menus will now appear at the top of the screen, rather than on the side
- EDS 2.0 uses the Chicago Design System, a new design approach for City of Chicago applications and services. The Chicago Design System includes:
 - Unique, easy-to-read fonts
 - Intuitive buttons/icons, messaging formats, and form elements
 - Chicago-themed color scheme that is pleasing to the eye

Online EDS 2.0 Cheat Sheet for External Users

EDS Search (Public Users)

ONLINE ECONOMIC DISCLOSURE STATEMENT

HOME EDS SEARCH VENDOR REGISTRATION SUPPORT ▾ LOG IN

EDS Search

** or %' denotes wildcard

EDS Number Specification Number Contract Number Vendor Name

> Advanced search options

Reset Search

Home Disclaimer Web Standards Site Credits Site Map Contact Us Press Room Website Feedback

- The Basic EDS Search fields have been reduced to the “critical” fields:
 - EDS Number
 - Specification Number
 - Contract Number
 - Vendor Name
- Click on the dropdown labeled **Advanced Search Options** to reveal the Advanced EDS Search fields

ONLINE ECONOMIC DISCLOSURE STATEMENT

HOME EDS SEARCH VENDOR REGISTRATION SUPPORT ▾ LOG IN

EDS Search

** or %' denotes wildcard

EDS Number Specification Number Contract Number Vendor Name

▼ Advanced search options

Status: AWARDED

Revision Number

User Department Project Number

Controlling Party Name

Vendor Number

Doing Business As

Officer/Director Name

Retained Party Name

Contract Description

Release Number

Shareholder Name

Titleholder/Executor/Plan Admin

Reset Search

Online EDS 2.0 Cheat Sheet for External Users

Vendor Registration

Vendor Registration ? 1 User 2 Company 3 Summary

User Details ?

Each person who is involved in the preparation, review, or submission of an EDS must have their own log-in. For example, if a staff person will prepare an EDS for a supervisor's signature, both should have their own log-ins.

Each Company must have a unique ID!

* - Required Field

Is this an existing City of Chicago user ID?
☐ Yes ☒ No

Salutation First Name * Middle Name

Last Name * Suffix

Title * Business Phone *

User ID * ?

Password * ? Confirm Password * ?

Email Address * Confirm Email Address *

- User ID and Password requirements have been updated and are now available in the "?" bubbles on the Vendor Registration – User page next to the following fields:
 - User ID
 - Password
 - Confirm Password

User Id requirements

- Must be 7-64 characters long
- Must contain at least 1 letter
- Must not contain any of the following special characters:
() < > , ; ' * / ' = *
- Must not contain a blank space
- Must not start with #
- Must not end with .
- Can contain any of the following special characters:
! @ # \$ % ^ _ & ~ -

Close

- User ID requirements will display as an overlay window

Online EDS 2.0 Cheat Sheet for External Users

The screenshot shows a registration form for the Online EDS 2.0 system. A modal window titled "Password requirements" is overlaid on the form. The form includes fields for "Is this an existing City of Chicago user ID?", "Salutation", "First Name", "Last Name", "Title", "User Id", "Password", "Confirm Password", "Email Address", "Confirm Email Address", "Your Secret Question", and "Answer To Secret Question". The password requirements modal lists the following rules:

- Must be at least 8 characters long
- Must contain at least 1 lowercase letter
- Must contain at least 1 uppercase letter
- Must not be the user ID or too similar to the user ID
- Must contain a number OR any of the following special characters:
! @ # \$ % ^ _ & - ~
- Must not contain any of the following special characters:
() < > , ; : ' / ' = *

The modal has a "Close" button in the bottom right corner.

- Password requirements will also display as an overlay window

The screenshot shows the same registration form as above, but with the "Password" and "Confirm Password" fields highlighted by a red oval. The form is filled with test data: "Is this an existing City of Chicago user ID?" is set to "No"; "Salutation" is "Mr."; "First Name" is "John"; "Middle Name" is empty; "Last Name" is "Test"; "Suffix" is empty; "Title" is "Finance Manager"; "Business Phone" is "555-555-5555"; "User Id" is "JohnTest1"; "Password" and "Confirm Password" are both masked with asterisks; "Email Address" and "Confirm Email Address" are both "smansuri@eki-consulting.com"; "Your Secret Question" is "In what city were you born?"; and "Answer To Secret Question" is "Chicago". The form has "Cancel" and "Next" buttons at the bottom.

- EDS 2.0 allows the registrant to select their own password at the time of registration; there will not be any more temporary system-assigned passwords

Online EDS 2.0 Cheat Sheet for External Users

The screenshot shows the 'Vendor Registration' page with the 'Company' step selected. The page title is 'ONLINE ECONOMIC DISCLOSURE STATEMENT'. The navigation bar includes 'HOME', 'EDS SEARCH', 'VENDOR REGISTRATION', 'SUPPORT', and 'LOG IN'. The progress indicator shows three steps: 1 User, 2 Company (selected), and 3 Summary. The 'Company Information' section contains the following fields and questions:

- Do you have an EDS invitation number?**
☐ Yes ☒ No
- Do you know your company's tax id number (FEIN or SSN)?**
☐ Yes ☒ No
- Do you know your company's vendor id? (Answer yes only when working with Online EDS support staff – this is not your FMPS/Supplier vendor number).**
☐ Yes ☒ No
- Company Legal Name**

Input fields are provided for 'Invitation Number', 'FEIN/SSN' (with a note: '(Must be formatted as 00-0000000 for FEIN or 000-00-0000 for SSN)'), and 'Vendor Id'. At the bottom are 'Previous', 'Next', and 'Cancel' buttons.

- On the Vendor Registration – Company page, the questions have been re-organized and updated to reflect their importance

The screenshot shows the 'Vendor Registration' page with the 'Summary' step selected. The progress indicator shows three steps: 1 User, 2 Company, and 3 Summary (selected). The 'Summary' section displays the registration details:

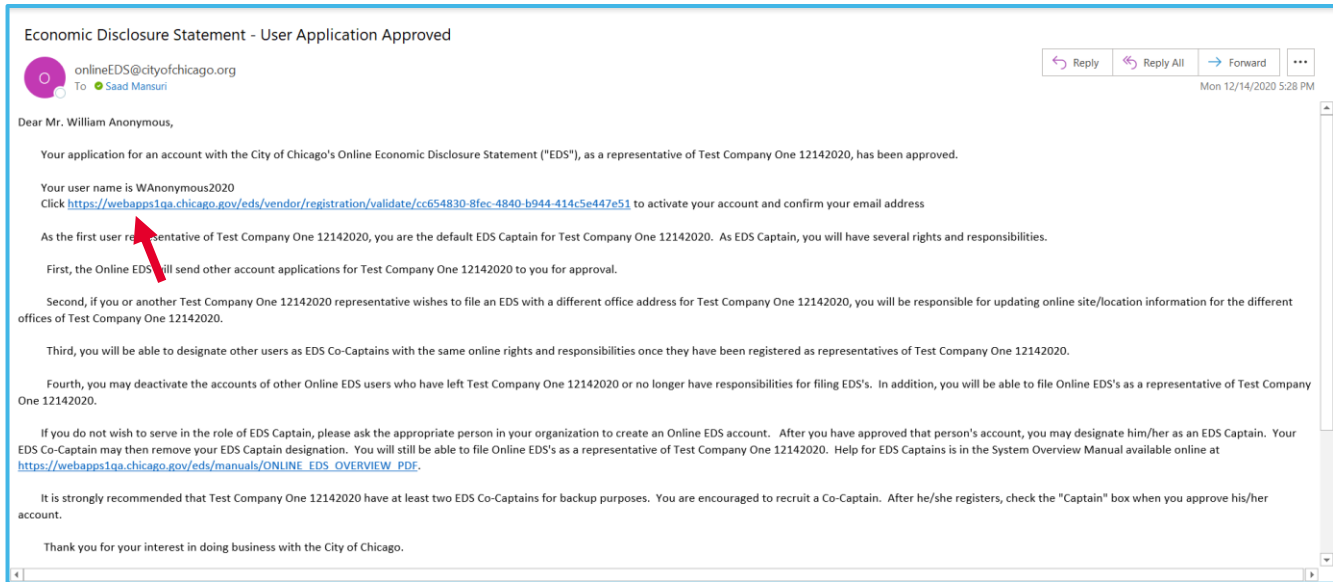
User Info:	Mr. John Test - Finance Manager
Email:	smansuri@eki-consulting.com
User ID:	JohnTest1
Company Legal Name:	Test Company 121420 12567 W Cumberland Ave Room 4656 Chicago, IL 60646 United States
FEIN/SSN:	XX-XXX4517

Below the summary, a message states: "You have chosen to add 'Test Company 121420' as a new vendor in the system. You will be designated as the EDS Captain and you may be contacted by other users as they try to do business with the City representing 'Test Company 121420'."

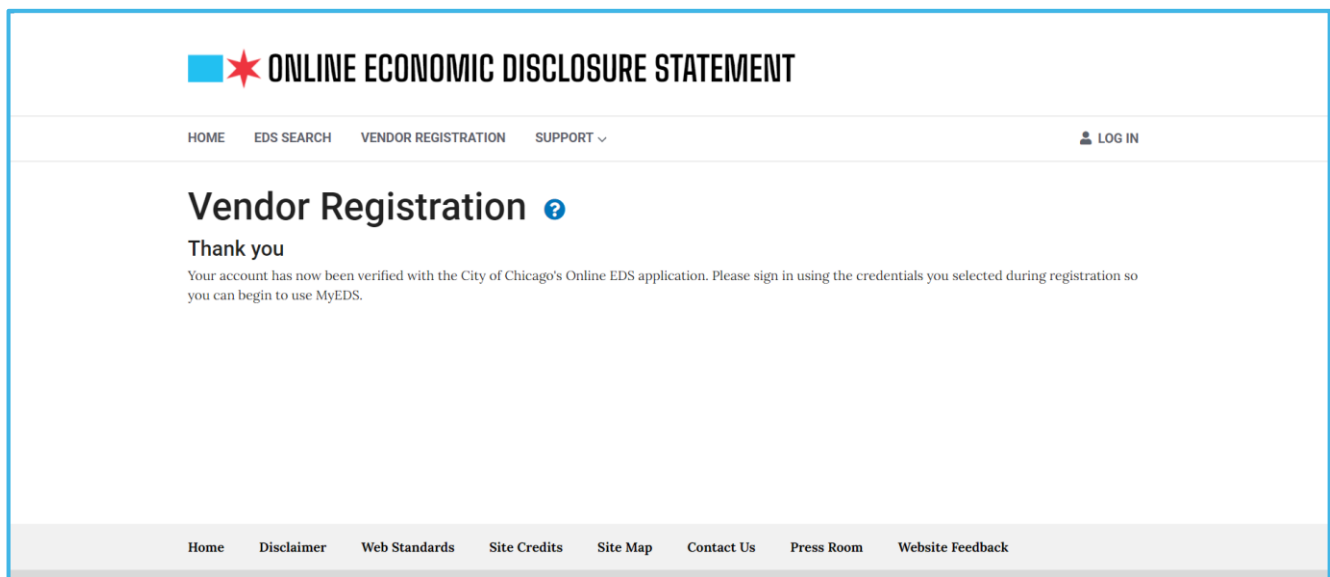
A red arrow points to a reCAPTCHA box containing a green checkmark and the text "I'm not a robot". Below the reCAPTCHA is a blue bar with the instruction: "Select 'Confirm' to complete your registration." At the bottom are 'Previous', 'Confirm', and 'Cancel' buttons.

- EDS 2.0 will also make use of reCAPTCHA as a security measure to prevent fraud; registrants will be required to verify images from the Vendor Registration – Summary page

Online EDS 2.0 Cheat Sheet for External Users



- After the Vendor Registration process is complete, the user will receive an email confirming their registration, with a link to activate their account



- After the activation link has been clicked, the screen above will display, and they will be able to log in
- If they are not the first user (and default EDS Captain) for their company, then they will receive an email informing them that their registration must be approved by their EDS Captain. Once it is approved, they will receive an email informing them that they may log in to the system. They will not have to activate their account

Online EDS 2.0 Cheat Sheet for External Users

Login/Authentication

ONLINE ECONOMIC DISCLOSURE STATEMENT

HOME EDS SEARCH VENDOR REGISTRATION SUPPORT

Welcome

Please enter your User ID and Password. The User ID and password for City users is the same as your computer login.

User ID *
328004

Password *

Log In

Forgot your User ID? >
Forgot your Password? >

Home Disclaimer Web Standards Site Credits Site Map Contact Us Press Room Website Feedback

- The Login page follows a "card" design approach

ONLINE ECONOMIC DISCLOSURE STATEMENT

Lionel Richards
Richards & Associates

HOME EDS SEARCH MY EDS COMPANY ADMIN SUPPORT MY PROFILE LOGOUT

Home

Can't print your certificate of filing? You submitted an "Information Update", which is not a complete EDS. Click "Create New" and select "Contract" EDS. Once you submit the "Contract EDS", you will receive a certificate.

Just getting started?
Register and file your EDS in no time using our [Quick Start Guide](#).

Each Company must have a unique ID!
Need help with disclosing multiple layers of ownership?
Take a look at the pages 18-31 of the [How to file a new EDS document](#) manual or the ownership videos.

Can't log in?
Try "Forgot Your User ID?" and/or "Forgot Your Password?" in the upper right corner.

2017-05-04: The EDS questions will be updated beginning Thursday May 11. This is a summary of the changes in the updated EDS:

- Section III - Business Relationships with City Elected Officials becomes Section III -Income or Compensation To, or Ownership By, City Elected Officials, and questions changed
- Section V.B - Further Certifications - has been extensively reorganized and reworded.
- A new V.B.1 question about the use of integrity monitors, integrity compliance consultants, or private sector inspector generals has been added
- Section VII - Acknowledgments F.1-3 have been moved into the Certification section and reworded.

- The Home page now appears after logging in
- Announcements and a link to the "Quick Start Guide" will be available on this page

Online EDS 2.0 Cheat Sheet for External Users

EDS Search (Vendor)

[HOME](#) [EDS SEARCH](#) [MY EDS](#) [COMPANY ADMIN](#) [SUPPORT](#) [MY PROFILE](#) [LOGOUT](#)

EDS Search

'*' or '%' denotes wildcard

EDS Number
1572*

Specification Number

Contract Number

Vendor Name

[Advanced search options](#)

[Reset](#) [Search](#)

Search Results

Showing 1 to 7 of 7 entries

Vendor Name	EDS Number	Prime	Specification Number	Contract Number	Contract / Information Update	Submitted	Status	Actions
Chicago United Industries, Ltd.	157236	✓	341753	61709	Contract	12/02/2020 08:33 AM	AWARDED	Read only view View package
Open Kitchens, Inc.	157251	✓	699329	85550	Contract	11/24/2020 01:54 PM	AWARDED	Read only view View package
Centers for New Horizons, Inc.	157217	✓	1007645	100279	Contract	11/23/2020 12:46 PM	AWARDED	Read only view View package

- Prime indicator added to results table
- Contract/Information Update indicator added to results table

Online EDS 2.0

Cheat Sheet for External Users

EDS Form, Ownership Tree, and Submission

The screenshot displays the Online EDS 2.0 interface. At the top, there is a navigation bar with links: HOME, EDS SEARCH, MY EDS, COMPANY ADMIN, SUPPORT, MY PROFILE, and LOGOUT. On the left side, there is a vertical menu with tabs: General Information, Ownership Interests (highlighted in blue), Income/Compensation, Retained Parties, Certifications, Fed Certifications, Acknowledgements, Appendix A, Appendix B, Appendix C, and Additional Info. The main content area is titled '2. Ownership Information' and includes a question mark icon. It contains instructions for providing ownership information, including a list of steps: 1. Click on the Add Owner button to add an owner, the Remove Owner button to remove an owner, and the Edit Owner button to edit an owner. 2. Keep adding owners of owners in excess of 7.5% ownership until only individuals are disclosed or there are no more legal entities having ownership in excess of 7.5% of the Disclosing Party. To add an owner of an entity, click the Add Owner button next to its name. 3. When you have finished adding owners, each owner which is a legal entity having an ownership in excess of 7.5% of the Applicant must be invited to submit their own Online EDS. This can be done by clicking the 'I' button. Legal entity owners with 7.5% ownership or less in the Applicant will not have an 'I' button. Below the instructions, there is a section titled 'To send your invitations, you must successfully submit your EDS to the City. Invitations will be held until the EDS is submitted.' and a note: 'If your organization submitted an EDS within the last 12 months, your ownership information is pre-filled by the system. Edit this information if it has changed, or click "R" next to each owner to recertify that the ownership information remains the same.' At the bottom of the main content area, there is a row of buttons: Add owner, Remove owner, Edit owner, Invite owner, and Recertify owner. Below these buttons is a table showing ownership information. The table has columns for 'Owner', 'Ownership Percentage', and 'Actions'. The first row shows 'Ed...ns' with a percentage of '(35.0%)' and actions for Add, Remove, Edit, and Invite. The second row shows 'H...ns' with a percentage of '(55.0%)' and actions for Add, Remove, Edit, and Invite.

The screenshot displays a confirmation message box titled 'Cancel In Process EDS'. The message asks: 'Are you sure you would like to exit your In Process EDS? Any unsaved information you have entered will be lost.' There are two buttons: 'Close' and 'Confirm'.

- Vertical tabs for form sections
- Clickable steps for pages
- Ownership tree re-designed with collapsible sections
- Confirmation message when Cancel button is clicked from the EDS form

Online EDS 2.0 Cheat Sheet for External Users

My EDS

[HOME](#) [EDS SEARCH](#) [MY EDS](#) [COMPANY ADMIN](#) [SUPPORT](#) [MY PROFILE](#) [LOGOUT](#)

Recently Submitted

EDSes submitted by your company in the last 12 months are available here. EDSes older than 12 months may be found by using "EDS Search". Enter your company name in "Vendor Name" and click "Search." Use the wildcard '%' or '*' when entering a portion of your company name. You may also use "Advanced Search Options" and other search criteria.

EDS Number	Contract / Information Update	Specification Number	Status	Submitted	Submitted By	Actions
2	Contract	5	SUBMITTED	08/11/2020 10:23 AM	L	Read only view ...
2	Contract	1	SUBMITTED	08/11/2020 11:02 AM	L	Read only view ...

[HOME](#) [EDS SEARCH](#) [MY EDS](#) [COMPANY ADMIN](#) [SUPPORT](#) [MY PROFILE](#) [LOGOUT](#)

Returned From City

= Locked By You
 = Locked By Another User

Locked	EDS Number	Specification Number	Status	Returned	Actions
	13	3	RETURNED	08/11/2020 11:06 AM	Read only view ...
	12	4	RETURNED	09/02/2020 09:41 AM	Read only view ...

- Single action button exposed with the remainder in an ellipsis; if only two buttons are present, then both buttons will display
- Contract/Information Update indicator added to Drafts and Recently Submitted tables
- City Comments tab will now appear on the top of EDS forms that have been Returned From the City

Company Admin

[HOME](#) [EDS SEARCH](#) [MY EDS](#) [COMPANY ADMIN](#) [SUPPORT](#) [MY PROFILE](#) [LOGOUT](#)

[Site Administration](#)
[User Administration](#)

Recently Submitted

- Vendor Admin has been re-named Company Admin
- Site Administration information now appears in tables

Online EDS 2.0

Cheat Sheet for External Users

User Administration

Your company or organization may have multiple EDS users. Registrations for new user accounts must be approved by you or another EDS Captain before the user account is created.

Pending Registrations

Click "Approve" or "Deny". Upon approval, the user moves to the "Approved Users" list. You may check the box "EDS Captain" after the user moves to the "Approved Users" list to make the user an EDS Captain (company administrator). We recommend having more than one captain in case one leaves.

↑↓	User ID	↑↓	Name	↑↓	Registration Date	↑↓	Title	↑↓	Email	↑↓	Telephone	↑↓	Actions	↑↓
1													Approve	Deny

Approved Users

Active approved users ("Active" box checked) may submit EDSes on behalf of your company or organization and view previously submitted EDSes. Deactivate a user who no longer needs access by unchecking the "Active" box. Check the "EDS Captain" box to make the user an EDS Captain (company administrator). EDS Captains can change site information and approve/deny new users.

User ID	↑↓	Name	↑↓	Title	↑↓	Email	↑↓	Telephone	↑↓	EDS Captain	↑↓	Active	↑↓
C										<input checked="" type="checkbox"/>		<input type="checkbox"/>	
T										<input checked="" type="checkbox"/>		<input type="checkbox"/>	

[Update](#)

Rejected Users

Users whose registration was rejected in error may be approved by clicking "Approve".

User ID	↑↓	Name	↑↓	Title	↑↓	Email	↑↓	Telephone	↑↓	Actions	↑↓
										Approve	
										Approve	

- User Administration updates
 - EDS Captain flags have been added for all users
 - Users that have been rejected can now be approved
 - Email addresses are now present in all tables