

1. Overview

In this tutorial, we will provide instructions on how to set up an account:

- Complete user registration request
- Email notification of user registration regarding approval status (i.e., Approved or Not Approved)
- Concept of EDS Team Captain and EDS Team Member within each company

You will need to set up an account to fill out an online Economic Disclosure Statement (EDS).

Below is a high-level summary of events:

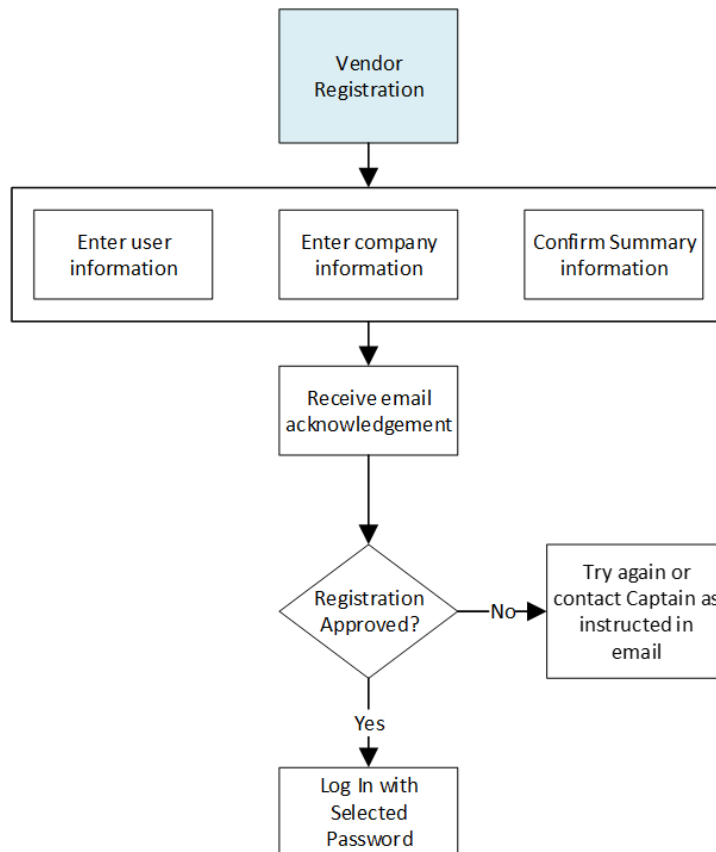


Figure 1: Registration Overview

NOTES:

- If you represent more than one company, you must register for a separate account for each company
- If you are the first user to register for a vendor, then you are automatically assigned the role of "EDS Team Captain", which entitles you to administrative rights that an "EDS Team Member" does not possess

2. Registration

a. Click on the "Vendor Registration" menu item from the top navigation menu

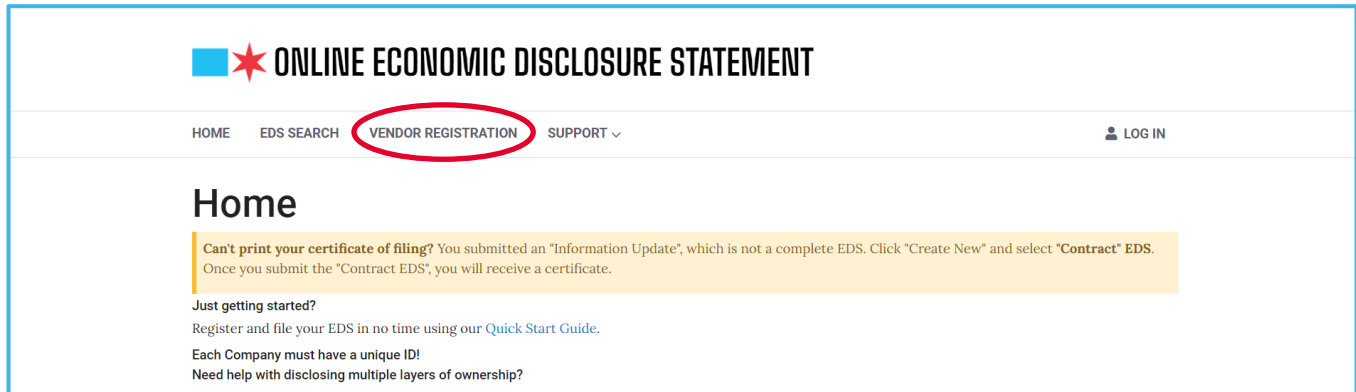


Figure 2: Home Screen

b. Enter user details on the "User Details" screen of the Vendor Registration

Figure 3: Vendor Registration - User Screen

1. Is this an existing City of Chicago ID?

- "No" is initially selected
- Click on the "Yes" radio button if you would like to change this answer
- Most people should answer "No" to this question. Click on "Yes", only if you have an existing online City account
- If you have an existing online City account, then you can use that user ID and password for the online EDS system by clicking "Yes" to this question

2. Enter your details in the appropriate fields:

- Salutation
- First Name
- Middle Name
- Last Name
- Suffix

3. Title. Your official title within your company

4. Business Phone number. Must be in the following format:

- 000-000-0000 for domestic numbers
- +11111111111 (At least 11 digits) for international numbers

5. User Id

- If you have an existing City account, then enter your user ID
- If not, provide a user ID that meets the requirements on the page. User ID requirements can be displayed by clicking on the "?" bubble next to the field title

6. Password

- If you have an existing City account, then enter the password for that account
- If you do NOT have an existing City account, then enter password and confirm password in respective fields
 - No action is required if field is grayed out
 - Password must meet the requirements on the page, which can be displayed by clicking on the "?" bubble next to the field title

7. Email Address. Email address where you wish to receive EDS electronic correspondences

8. Confirm Email Address. Re-enter email address exactly as above

9. Your secret question. Select a secret question that is easy to remember, as you will need to provide the answer to this question as part of your digital signature

10. Answer to secret question. Provide an answer to secret question selected above. You will need to provide this answer as part of your digital signature for the online EDS

11. Click on "Next" to proceed to next screen or "Cancel" to end registration process

c. Provide the requested information of the company you are representing

The screenshot shows the 'Vendor Registration' screen with a progress bar indicating three steps: 1. User, 2. Company (current), and 3. Summary. The 'Company Information' section includes instructions and three questions with radio button options. The first question is 'Do you have an EDS invitation number?' with 'Yes' and 'No' options. The second is 'Do you know your company's tax id number (FEIN or SSN)?' with 'Yes' and 'No' options. The third is 'Do you know your company's vendor id? (Answer yes only when working with Online EDS support staff – this is not your FMPS/iSupplier vendor number)' with 'Yes' and 'No' options. Each 'Yes' option is followed by a text input field: 'Invitation Number', 'FEIN/SSN' (with a note: '(Must be formatted as 00-0000000 for FEIN or 000-00-0000 for SSN)'), and 'Vendor Id'. A 'Company Legal Name' field is at the bottom. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom left.

Figure 4: Vendor Registration - Company Screen

1. Do you have an EDS invitation number?

- “No” is selected initially. Skip to the next step if you do not have this information
- Click on “Yes” if you have an invitation number; then enter your invitation number in the Invitation Number field
- The Invitation Number field is open for data entry only if you selected “Yes” to the question above

2. Do you know your company's tax id number (FEIN or SSN)?

- “No” is selected initially. Skip to the next step if you do not have this information
- Click on “Yes” if you know your company's FEIN or SSN number; enter FEIN or SSN in FEIN / SSN field
- The FEIN / SSN field is open for data entry only if you selected “Yes” to question above

3. Do you know your company's vendor id? (Answer yes only when working with Online EDS support staff – this is not your FMPS/iSupplier vendor number)

- “No” is selected initially. Skip to the next step if you do not have this information
- Click on “Yes” if you know your company's vendor id; enter vendor id in Vendor Id textbox field
- The Vendor Id field is open for data entry only if you selected “Yes” to question above

4. Company Legal Name

- Enter a key word or partial word that is unique to your company name. The system will try to find your company information in our records
- Below are TIPS to find the most complete list of likely matches:

- One or partial word provides the best search results
- Enter a fragment or a key word that is unique to your company name
- Do not enter company suffixes such as "inc", "co", etc.
- Example: If the name of the company is "Fred Jones & Sons Co." for best results, enter "Fred Jones" only. DO NOT use special characters such as "&", and "co"

5. Click "Next" to proceed to next screen, "Previous" to return to previous screen, or "Cancel" to end registration process

d. Based on the Company Name information you entered on the previous screen, one of the following scenarios is possible

1. Scenario 1 – Match is found where the last 4 digits of FEIN/SSN matches that of your company
2. Scenario 2 – Match(es) is found, but your company is not listed
3. Scenario 3 – NO match is found

Scenario 1 - Match is found where the last 4 digits of FEIN/SSN matches that of your company

The screenshot displays the 'Vendor Registration' page of the 'ONLINE ECONOMIC DISCLOSURE STATEMENT' system. The page has a navigation bar with links for HOME, EDS SEARCH, VENDOR REGISTRATION, and SUPPORT, along with a LOG IN button. Below the navigation bar, the 'Vendor Registration' title is followed by a progress indicator showing three steps: 1 User, 2 Company (current step), and 3 Summary. The main content area is titled 'Matching Vendors' and includes the instruction 'Please select one of the following options.' A red box highlights a single vendor entry: 'Best Group Engineering'. The address listed is '3254 W Maple Drive, Suite 3501, Chicago, IL, 60645, United States'. The vendor details include 'Vendor #: 226345' and 'FEIN/SSN: xx-xxx7434'.

Figure 5: Vendor Registration - Match Found

- **Click on the radio button next to your company name.** Select the company record if the last 4 digits of your FEIN/SSN or vendor id matches that of your company, even if any of the information is incorrect (e.g., Company Name, address, etc.). After you have completed registration, you may request your company's EDS Captain to correct your company's information as appropriate. Your EDS Captain may correct this information by clicking "Company Admin", "Site Administration".
- **Click "Next" to proceed to next screen, or "Previous" to return to previous screen, or "Cancel" to end registration process**

Scenario 2 - If matches are found, but your company is NOT listed, in that case click on radio button next to "Add my information as a new vendor"

- **If you have done business with the City of Chicago, but no match is found for your company, click on "Previous" button to return to previous, check the spelling entered in the Company Legal Name and try again.**
- **FEIN/SSN.** Enter your company's FEIN or SSN (domestic companies only)
- **Company Legal Name.** Enter the legal name of your company; It is important to review this information for spelling accuracy
- **Enter your company's address information.** Business Address Line 1, Business Address Line 2, Business Address Line 3, City, Country, State/Province, and Zip Code/Postal Code
- **Click "Next" to proceed to next screen, or "Previous" to return to previous screen, or "Cancel" to end registration process**

Scenario 3 - If match is NOT found to any company records in our system, then you must enter the following information:

Vendor Registration ? 1 User 2 Company 3 Summary

Matching Vendors

* - Required Field

☒ Add my information as a new vendor.

FEIN/SSN *

(Must be formatted as 00-0000000 for FEIN or 000-00-0000 for SSN)

Company Legal Name *

Business Address Line 1 *

Business Address Line 2

Business Address Line 3

City *

Country *

United States ▼

State/Province *

▼

Zip Code/Postal Code *

Figure 6: Vendor Registration - New Company Record

- **FEIN/SSN.** Enter your company's FEIN or SSN (domestic companies only). If your company is not a US domestic company or is a joint venture that does not have a

FEIN number, leave it blank and explain the lack of an FEIN in the “Comments” box that will appear.

- **Company Legal Name.** Enter the legal name of your company; It is important to **review** this information for spelling accuracy
- **Enter your company’s address information.** Business Address Line 1, Business Address Line 2, Business Address Line 3, City, Country, State/Province, and Zip Code/Postal Code
- **Click “Next” to proceed to next screen, or “Previous” to return to previous screen, or “Cancel” to end registration process**

e. The following screen will be displayed only if there are other users in your company that are already registered with the Online EDS system:

ONLINE ECONOMIC DISCLOSURE STATEMENT

HOME EDS SEARCH VENDOR REGISTRATION **SUPPORT** LOG IN

Vendor Registration ?

1 User 2 Company 3 Summary

Matches Found

Our records show that your company, Best Group Engineering, has one or more active users registered with the Online EDS application. Please select one of the following users who will approve your registration and add your user id to the Best Group Engineering vendor profile.

☒ Mr. William Jones - Manager smansuri@eki-consulting.com 773-555-5555

If you are unable to contact one of these users, contact the site administrator at onlineEDS@cityofchicago.org

Previous Next Cancel

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

Figure 7: List of EDS Team Captains Found for your Company

1. **Click on the radio button next to the user that is authorized to review and approve your registration**
2. **Click on “Next” to proceed to next screen, or “Previous” to return to previous screen, or “Cancel” to end registration process**

f. Review the summary screen for accuracy

ONLINE ECONOMIC DISCLOSURE STATEMENT

HOME EDS SEARCH VENDOR REGISTRATION SUPPORT ▾ LOG IN

Vendor Registration ?

1 User 2 Company 3 Summary


Summary

Here is the summary of the registration process

User Info:	Mr. James F Best - Staff Engineer
Email:	smansuri@eki-consulting.com
User ID:	JBEST2020
Company Legal Name:	Best Group Engineering 3254 W Maple Drive Suite 3501 Chicago, IL, 60645 United States
FEIN/SSN:	XX-XXX7434

In order to register with the Online EDS application, your registration must be approved by:
EDS Captain: Mr. William Jones, Manager
smansuri@eki-consulting.com
773-555-5555

Once your registration is approved, you will be sent an email containing your Log In information. If you are unable to reach "Mr. William Jones", contact the site administrator at onlineEDS@cityofchicago.org

☐ I'm not a robot 

1 Select "Confirm" to complete your registration.

[Previous](#) [Confirm](#) [Cancel](#)

Figure 8: Registration Summary

1. **Verify that your User Info, Email, and User Id are accurate. If yes, complete the CAPTCHA, then click "Confirm"**
 - Your company name and address may be corrected by your EDS Captain
2. **If revisions are required, click "Previous" to edit your responses on the previous screen. Click "Cancel" if you wish to end your registration process**

g.Registration Complete

ONLINE ECONOMIC DISCLOSURE STATEMENT

HOME EDS SEARCH VENDOR REGISTRATION SUPPORT ▾ LOG IN

Vendor Registration ?

Registration complete

Your registration as a vendor user is complete. Your verification link has been mailed to smansuri@eki-consulting.com. You should be receiving it within 10 minutes, although sometimes it may take longer. You must open the verification link email and click on the link before you can log in with your new account. After clicking the verification link, you may click the Log In button to be taken to the Log In screen. As the first user representative of **Best Group Engineering**, you are the default EDS Captain for **Best Group Engineering**. As EDS Captain, you will have several rights and responsibilities.

First, the Online EDS will send other account applications for **Best Group Engineering** to you for approval.

Second, if you or another **Best Group Engineering** representative wishes to file an EDS with a different office address for **Best Group Engineering**, you will be responsible for updating online site/location information for the different offices of **Best Group Engineering**.

Third, you will be able to designate other users as EDS Co-Captains with the same online rights and responsibilities once they have been registered as representatives of **Best Group Engineering**.

Fourth, you may deactivate the accounts of other Online EDS users who have left **Best Group Engineering** or no longer have responsibilities for filing EDSs. In addition, you will be able to file Online EDSs as a representative of **Best Group Engineering**.

Figure 9: Registration Summary as EDS Captain



Figure 10: Registration Summary as EDS User

3. Email notification of user registration

a. Email notification of registration submission if you are an EDS Team Captain for your company

- The role of EDS Team Captain is automatically assigned to the first person to register as a user for this vendor
- The email will provide the rights and responsibilities of an EDS Captain
- The email contains a link that activates your account. Click on the activation link to activate your account before logging in. You will not be able to login until you have clicked the activation link.

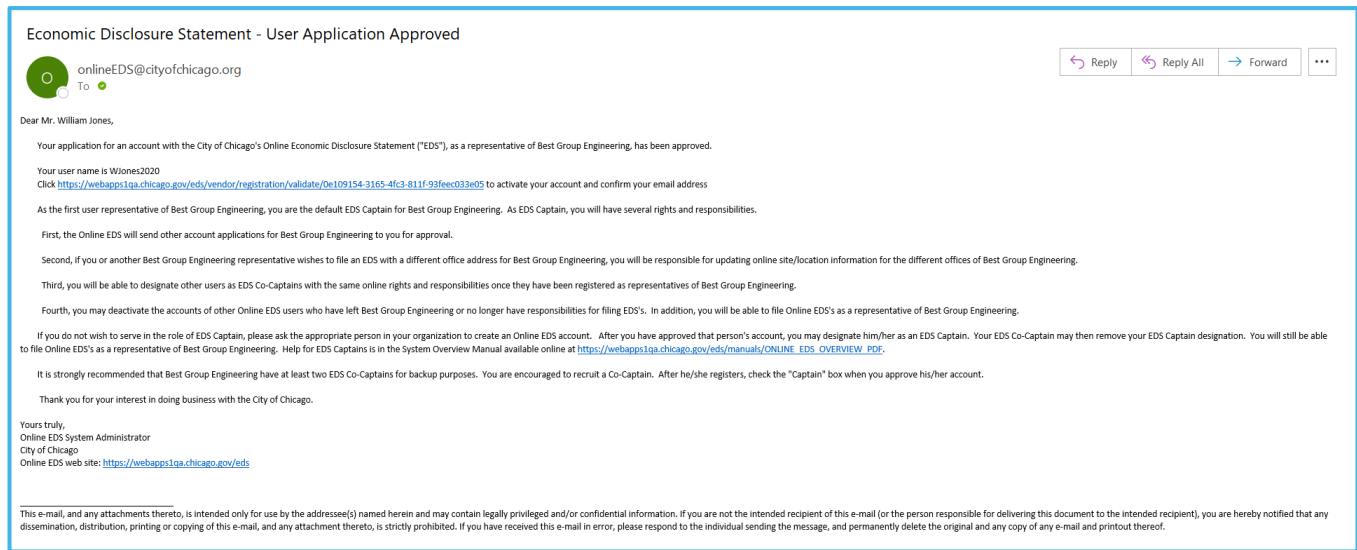


Figure 11: Email Notification - Assigned EDS Team Captain

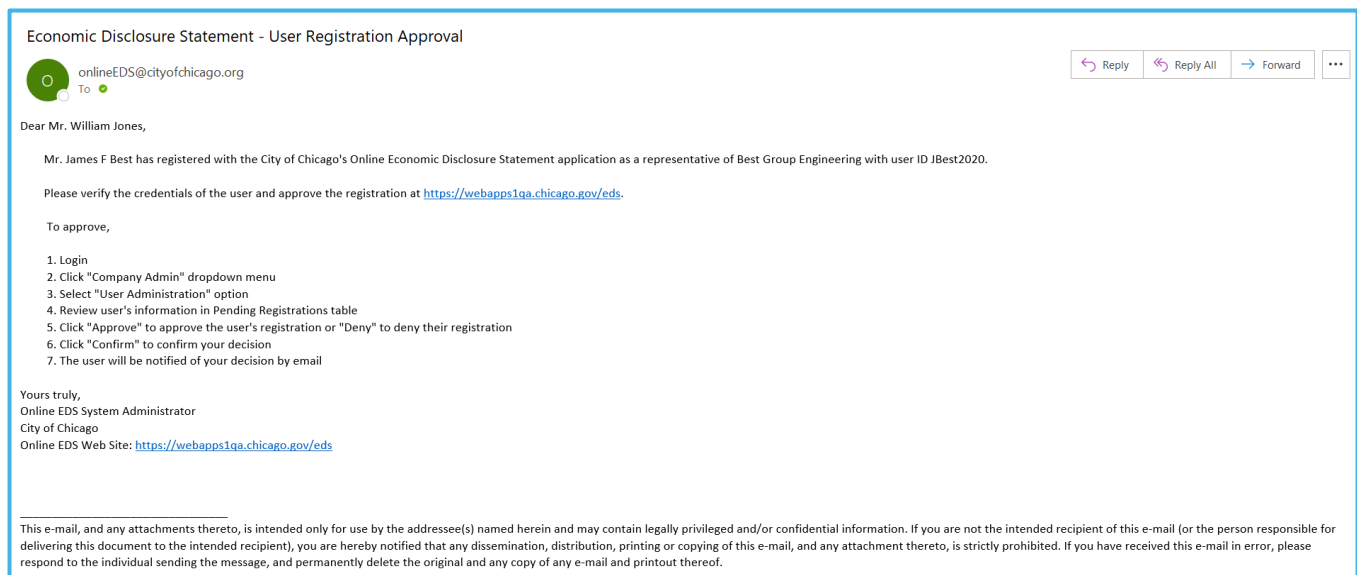


Figure 12: Email Notification - To EDS Team Captain when Secondary User Registers

b. Email notifications of registration submission if you are NOT an EDS Team Captain for your company

- The first email notification acknowledges receipt of your registration. No further action is required at this time until you receive the second email which contains the action on your registration request by your EDS Captain.

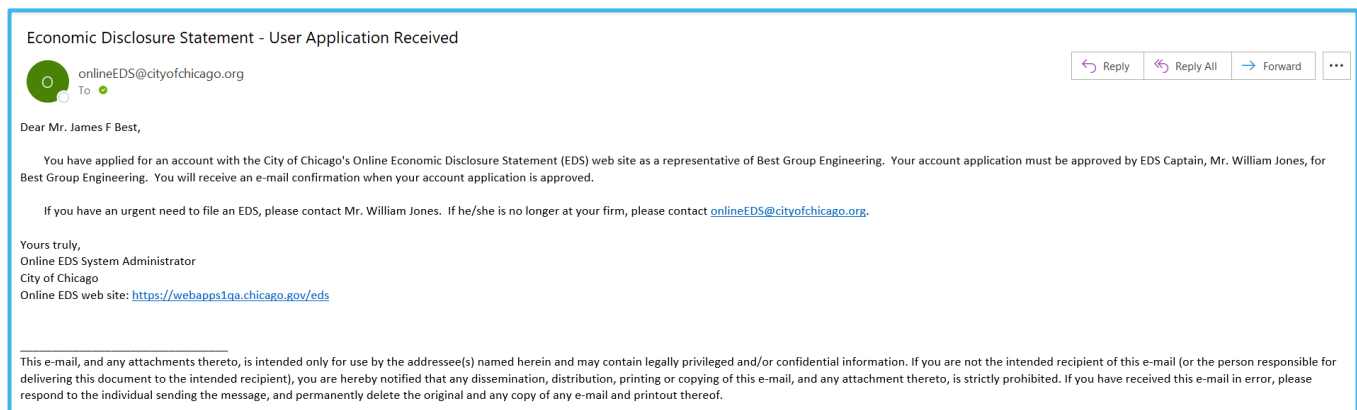


Figure 13: Email Notification - Registration Acknowledgement

- The second email notification states the approval status of your registration request. If your request is approved, then you will receive the following email which provides confirmation of the approval

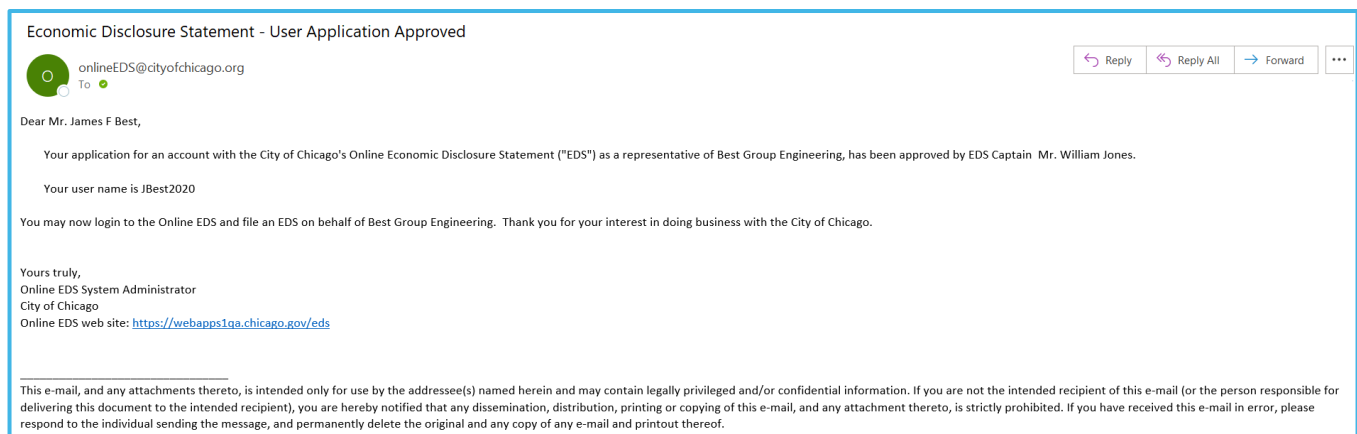


Figure 14: Email Notification - Registration Approved

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- c. If your request is not approved, then you will receive the following email which provides contact information of your EDS Team Captain for further information

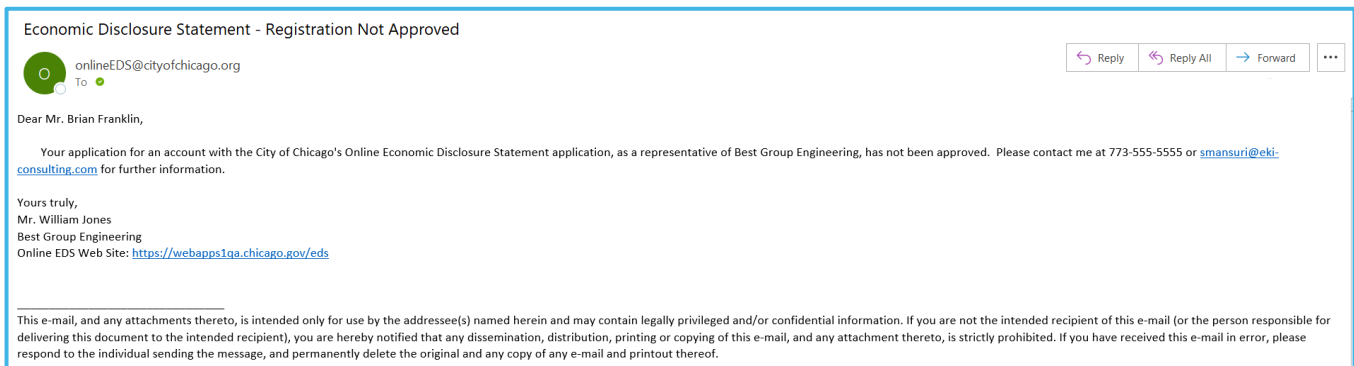


Figure 15: Email Notification - Registration Not Approved

- d. Log In to EDS System

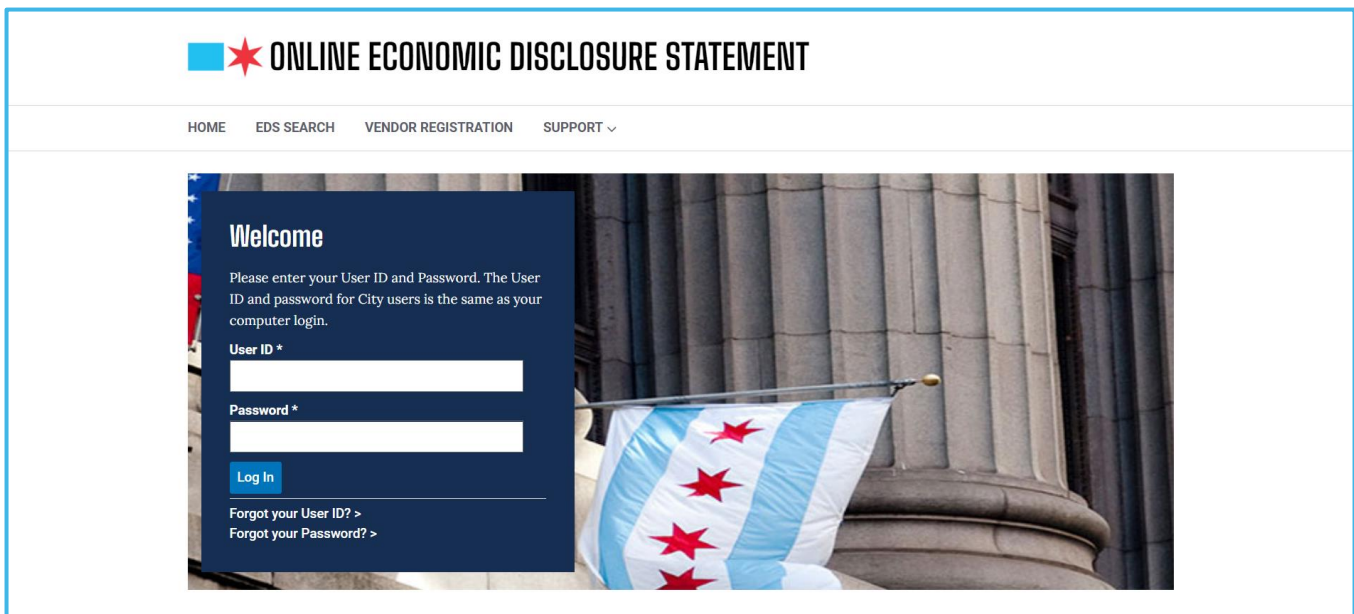


Figure 16: EDS Log In Screen

- Enter User Id and Password in respective fields. (Use the password which you selected when your account was created)
- Click on "Log In" to proceed to next screen or click "Forgot User ID/Password" if you forgot your credentials

e. After successfully authenticating, the Home page is displayed

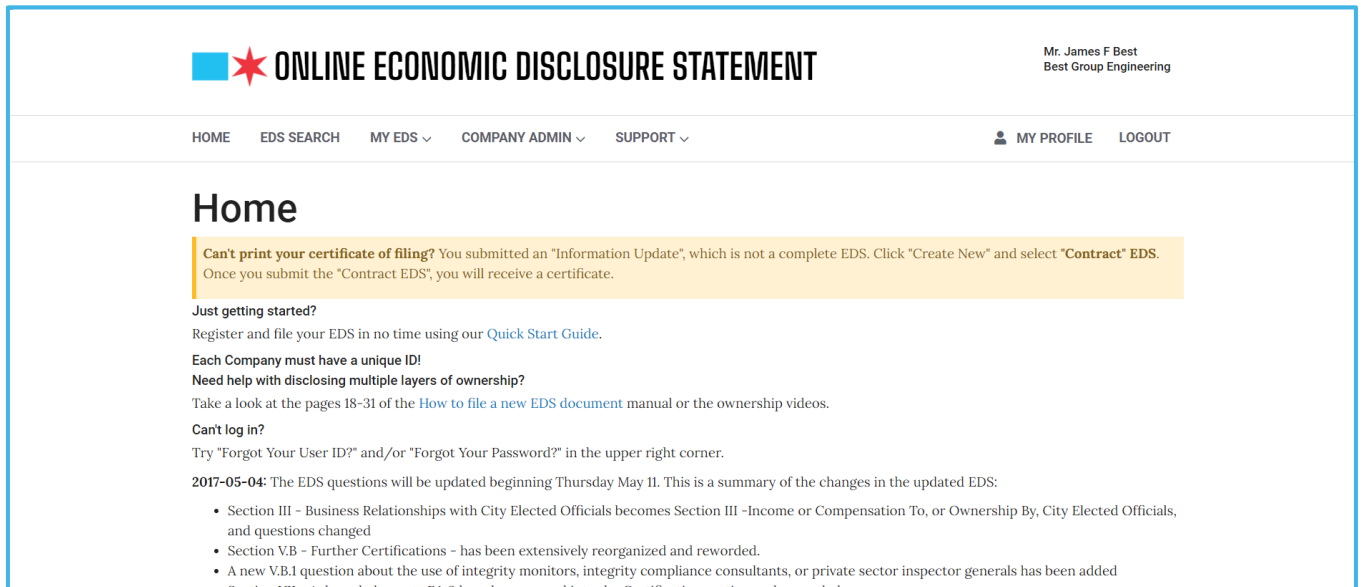


Figure 17: Authenticated User - Home Screen