1. Overview

In this tutorial, we will discuss elements of the screen displayed after you sign into the system and provide instructions on how to perform the functions available on those screens.

- **EDS Home Screen**. It allows you to view instructions and announcements related to the Online EDS System and well as information about you and your company.

- **My Profile.** It allows you to view and/or change user information such as email address, phone number, secret question and answer, and password.

- **EDS Search**. It allows you to search for EDS documents that are stored in the system.

- **My EDS**. It allows you to manage your company's EDS documents, including:

    o Create New EDS document.

    o Access Recently Submitted EDS documents.

    o Access Return From City EDS documents.

    o Access Drafts EDS documents.

    o Access EDS In Process.

- **Company Admin**. It allows you to manage your company sites and users. Depending on your role, you may see different options under Company Admin.

    If you are an EDS Captain, then you will see the following links:

    o Site Administration – It allows you to edit your company name, create new sites, delete sites, and edit sites.

    o User Administration – It allows you to approve or deny registration requests, assign users the role of EDS Captain, and activate or deactivate user accounts in the Online EDS system.

    If you are an EDS Team Member, then you will see the following links:

    o EDS Captains – It allows you to view a list of the EDS Captains in your company and their contact information.

2. EDS Home Screen

In this section, we will discuss the elements of the EDS Home Screen displayed immediately after you sign into the Online EDS System. The EDS Home Screen has the following sections:
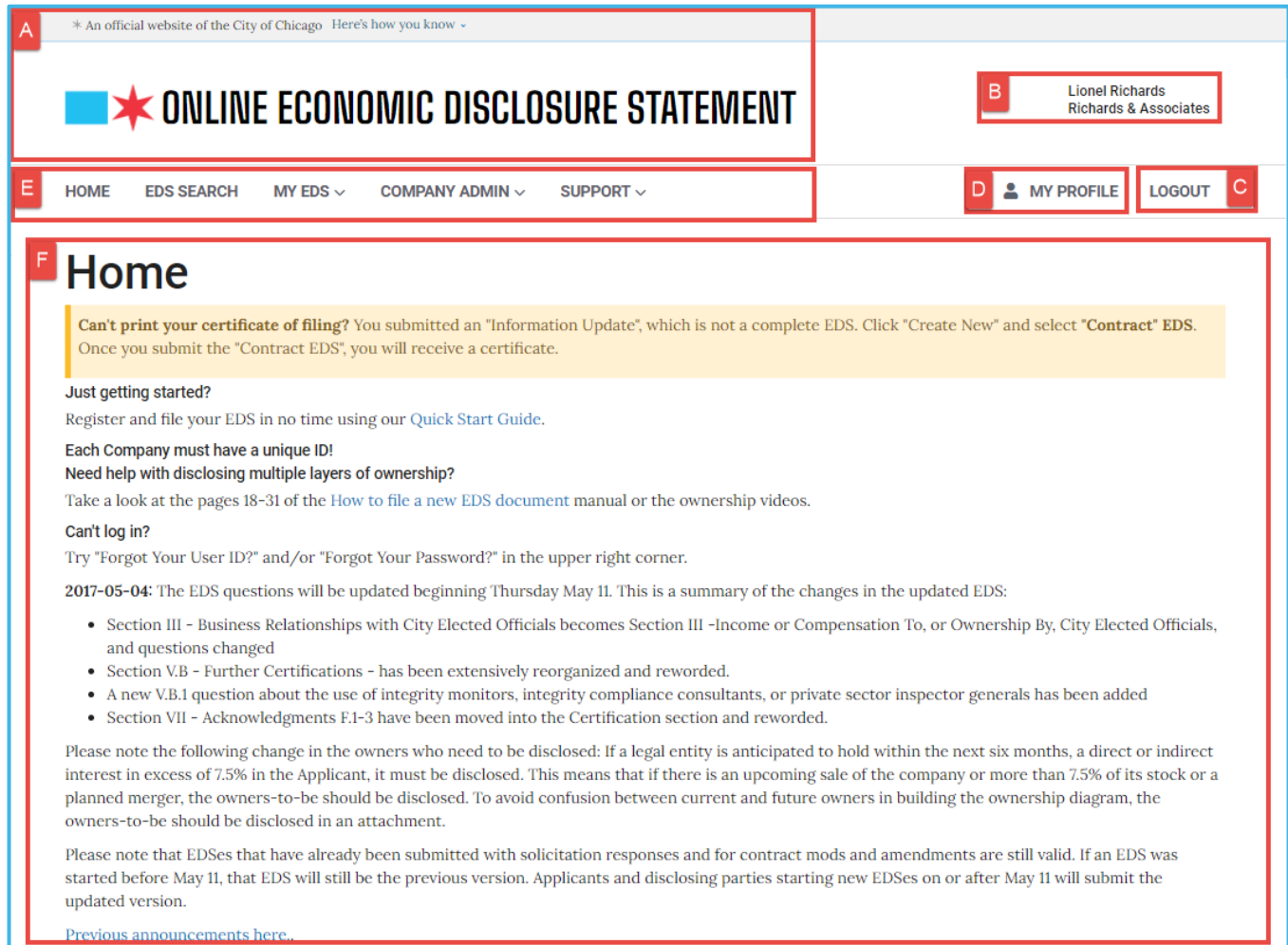

Figure 1: EDS Home Screen

A. City of Chicago logo and name of system, Online Economic Disclosure Statement.

B. Your name and the name of your company. **NOTE**: If you are representing more than one company, please verify that you are logged in to the right one. If not, exit and log back into the system with the right account information.

C. Login/Logout. Click the "Login" link to begin using the system and the "Logout" link to exit the Online EDS system. **NOTE**: Exiting the Online EDS system without using the "Logout" link could cause unexpected results.

D. My Profile. You may view and/or change any of the following information from My Profile screen:

    a. User Information such as email address, phone number, etc.

  b. Secret question and answer which is used as part of your electronic signature.

  c. Password may be reset as needed.

E. Navigation menu. List of links to perform the following functions:

  a. <u>HOME</u> to return to EDS Home screen.

  b. <u>EDS SEARCH</u> to search for EDS documents.

  c. <u>MY EDS</u> to manage your company's EDS documents:

- Create a new EDS document.
- View recently submitted EDS documents.
- Access EDS documents returned from the city.
- Access draft EDS documents.
- Access EDS documents in process that you are currently working on.

  d. <u>COMPANY ADMIN</u> to administer your company's:

- Sites
- Users

  e. <u>SUPPORT</u> to view announcements, privacy policy, City contact information, and to access frequently asked questions, manuals, and videos.

F. Instructions and Announcements related to the Online EDS System.

3. My Profile

You may view and/or change any of the following information from the My Profile screen. Click "Update" to save changes.

A. User Information such as email address, phone number, etc. Updated information will appear in EDSes created **AFTER** the update. Previously filed EDSes, EDSes that are in draft, or EDSes in response to invitations issued before the update will not be updated automatically. Those EDSes will need to be manually updated with this information.

B. Secret question and answer which is used as part of your electronic signature.

C. Password may be changed as needed.

Figure 2: My Profile screen

4. EDS Search

You may search for EDS documents that are stored in the system.

Figure 3: Search Results screen

4.1 Search results

A few things to know:

- If more than 100 EDS documents matched your search criteria, only the first 100 are shown. Please narrow your search to see all matching EDS documents.

- Search results display EDS documents stored in the system with the following status:
    - Submitted – Display only EDS documents that were submitted by your company.
    - Returned – Display only EDS documents that were submitted by your company but returned by the City.
    - Awarded – Display ALL EDS documents for awarded contracts.
- You may search by one or more search fields. When using multiple search fields, only EDS documents meeting all criteria will be returned in the Search Results screen.
- Initially, results are listed in date order starting from most recently submitted. You may change the sort order by clicking on the arrow at the top of a column. Click on the same arrow to reverse the sort order (ascending to descending and vice versa).

4.2 Most Common Searches and Suggested Search Options

For each of the searches below, enter the information you wish to search for in the appropriate search option field, then click Search.

- Search for a specific EDS document by **EDS number**.
- Search for EDS documents that your company has submitted for a **specification number**.
- Search for EDS documents that your company has submitted for a **contract number**.
- Search for an EDS document in specific **status** by selecting SUBMITTED, RETURNED, or AWARDED. It is recommended to search by status ALL.
- Search for EDS documents that contains name of **disclosing party** which your company has submitted. If entering the exact name of Disclosing Party does not produce the desired results, then use the wildcard search method in the name of Disclosing Party for best results.

4.3 Wildcard Search Method

You may use the wildcard search method by adding an asterisk "*" at the beginning, in the middle, and/or end of your search information. The wildcard search method is most useful for searching names or contract descriptions.

Example: Enter *electron* in the "Name of Disclosing Party" search field to search for EDS documents that contain the word "electron" in the contract description.

4.4 Basic Search Options

You may also search for EDS documents by entering information in the following basic search fields:

- EDS Number
- Specification Number
- Contract Number
- Vendor Name

Advance Search Options – You may also search for EDS documents by entering information in the advanced search fields. Click the "Advanced search options" link to display additional search options, which includes:

- Status
- Vendor Number
- Contract Description
- Revision Number
- Doing Business As
- Release Number
- User Department Project Number
- Officer/Director Name
- Shareholder Name
- Controlling Party Name
- Retained Party Name
- Titleholder/Executor/Plan Admin

Figure 4: EDS Search screen

5. My EDS

You may manage your company's EDS documents using the links under the "**My EDS**" menu option.

- **Create New**. Click on the "Create New" link to create a new EDS document.

- **Recently Submitted**. Click on "Recently Submitted" link to access EDS documents that your company has submitted to the City within the last year and have not been returned from the City.

- **Returned From City**. Click on "Returned From City" link to access EDS documents that have been returned to you for further revision.

- **Drafts**. Click on the "Drafts" link to access EDS documents that have been started and saved by your company, but not yet submitted to the City.

- **EDS In Process**. Click on the "EDS In Process" link to access EDS documents that you are currently working on.
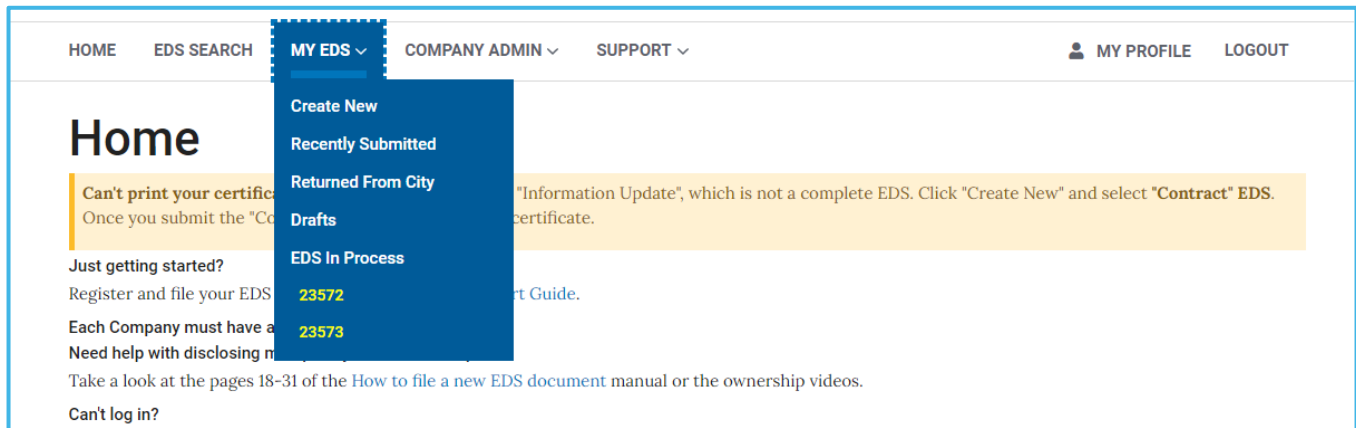
Figure 5: My EDS menu

5.1 Definitions of Actions

Below is a list of all possible actions available for each EDS document. You may encounter these actions when clicking on the links in the My EDS menu.
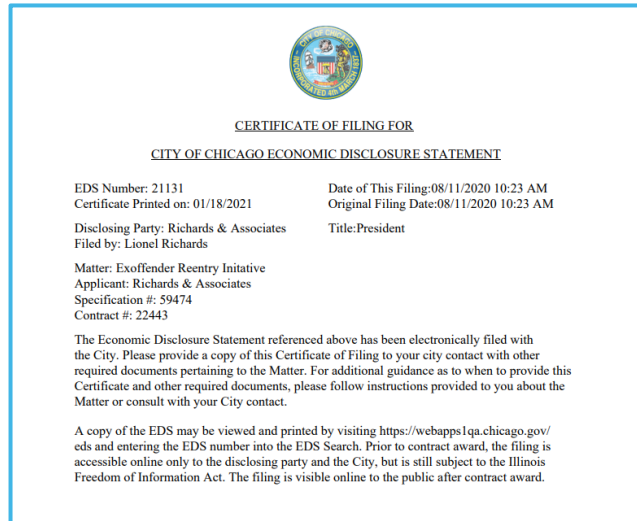
- **Fill EDS**. Used to open a draft EDS document to continue filling it out.

- **Locked by you**. It indicates you have the EDS document opened in REVISION mode, which may be caused by one of the following

  - If you navigated away from an EDS document, you may return to the EDS document by clicking the EDS number in "EDS In Progress".

  - If you improperly exit the system during a revision of an EDS document, the lock will be released in approximately one hour.

  NOTE**:** Unless you are making revisions, always open an EDS document with READ ONLY VIEW.

- **Locked by another user**. It Indicates another user has the EDS document opened in REVISION mode. You may not make revisions until that person has completed their revisions.

  NOTE**:** Unless you are making revisions, always open an EDS document with READ ONLY VIEW.

- **Print certificate**. Used to open PDF view of EDS Certificate.

Figure 6: Print certificate

- **Provide/Revoke authorization**. Used to provide or revoke authorization to City staff to view a draft EDS filing so that you can obtain advice about correcting errors.

- **Read only view**. Used to open a PDF view of a single EDS document.

Figure 7: Read only view

- **View package**. Used to open a PDF view of an EDS and all related EDS documents.

- **View related**. Used to display information about the applicant's EDS document and all related disclosing parties' EDS documents.

5.2 Definitions of Workspace Information

Below is the list of all information which you may or may not see in your workspace. When you click on one of the links under the "My EDS" menu, the Header and Workspace section will change. The Workspace section list all the EDS documents along with information and possible actions available for each EDS document.

Sort Order - Initially, EDS documents are listed starting from most recently submitted. You may change the sort order by clicking on the column name or arrows at the top of a column. Click again to reverse the sort order (ascending to descending and vice versa).

Below is list of information that you may see in your workspace:

- **Locked** – EDS document is opened for REVISION by you or another user. If an EDS document is locked, you may perform all other actions except Revision.
- **EDS Number** – Unique identifier of an EDS document.
- **Contract / Information Update** – Type of EDS document. EDS for a contract or an EDS information update.
- **Specification Number** – Specification number associated with this EDS document. May be blank if this is an Annual EDS Information Update or not provided by your company during new EDS creation.
- **Invitation Number** - An invite # is provided to an owner of the applicant and should be used to create a new EDS document when requested by the applicant.
- **Last Updated** – Date that the EDS document was last revised.
- **Status** – Current status of the EDS document.
- **Returned** – Date that the EDS document was returned by the City.
- **Submitted** – Date that the EDS document was submitted to the City.
- **Submitted By** – Person who submitted the EDS document to the City.
- **Actions** – Click on the links displayed in this column to perform allowable action on the EDS document listed in the row. Refer to section 5.1 for explanations of allowable actions.

5.3 Create New

The "Create New" link provides access to create a new EDS document. Detailed instructions on how to create a new EDS document will be provided in the **Create New EDS Document** manual

5.4 Recently Submitted

The "Recently Submitted" link provides access to EDS documents that your company has submitted to the City and have not been returned from the City. EDS documents displayed on this screen may **NOT** be revised. Below are actions that may be taken on EDS documents in "Recently Submitted" screen:

- Read only view
- View related
- View package
- Print certificate

Refer to section 5.1 for explanations of action and section 5.2 for workspace details.

Figure 8: Recently Submitted screen

5.5 Returned From City

The "Returned From City" link provides access to EDS documents that have been returned to you for further revision. EDS documents displayed on this screen may be revised. Revision of returned EDS document must be made promptly to expedite contract award or other City action. Below are actions that may be taken on EDS documents in "Return From City" screen:

- Read only view
- View related
- Fill EDS
- Provide authorization

Refer to section 5.1 for explanations of action and section 5.2 for workspace details.

Figure 9: Returned From City screen

The contact person identified when the EDS document was created will receive a 'Returned from the City' email notification with comments explaining the required revisions and/or actions.
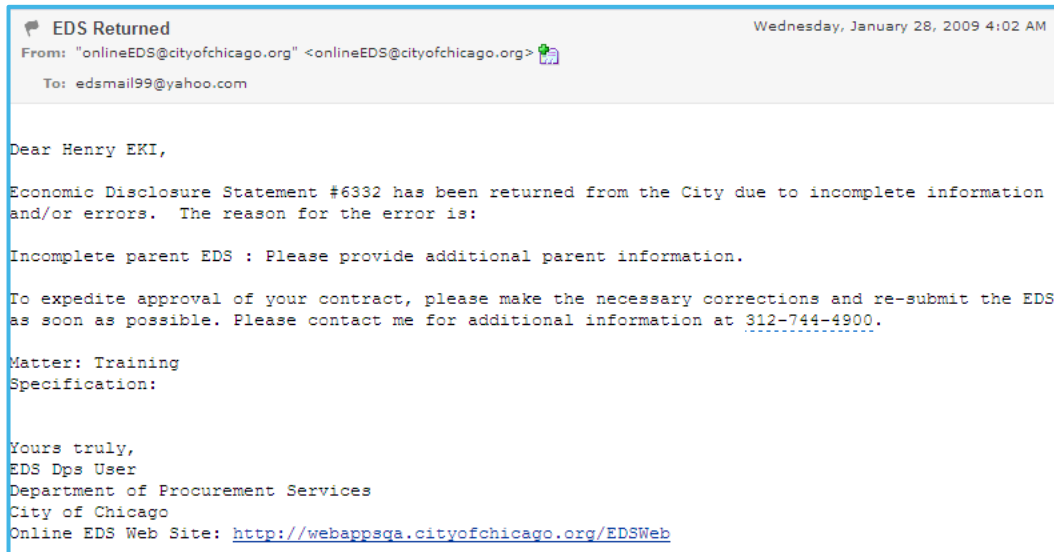
Figure 10 - Email Notification - EDS Returned by the City

5.6 Drafts

The "Drafts" link provides access to EDS documents that have been started and saved by your company, but not yet submitted to the City. Drafts are not visible to the City unless "Provide Authorization (Section 5.1) is clicked. Below are actions that may be taken on EDS documents in "Draft" screen:

- Fill EDS

- Read only view

- Provide authorization

Refer to section 5.1 for explanations of action and section 5.2 for workspace details.

Figure 11: Draft screen

5.7 EDS In Process

The "EDS In Process" link provides access to EDS documents that you are currently working on. Select from the list the EDS you would like to continue working on to fill out the EDS.

Figure 12: EDS In Process screen

6. Company Admin

You may manage your company sites and users using the links under the "**Company Admin**" menu option. Depending on your role, you may see different links under Company Admin.

If you are an EDS Captain, then you will see the following links:

- **Site Administration** – Allows you to edit your company name, create new sites, delete sites, and edit sites.

  NOTE: A site is a unique business address that you would like to use in an EDS document. For example, if you have an Illinois and a Florida office, then you will need to add both sites to the system to enter an EDS document using each address.

- **User Administration** – Allows you to approve or deny registration requests, assign users the role of EDS Captain, and activate or deactivate user accounts in the Online EDS system.
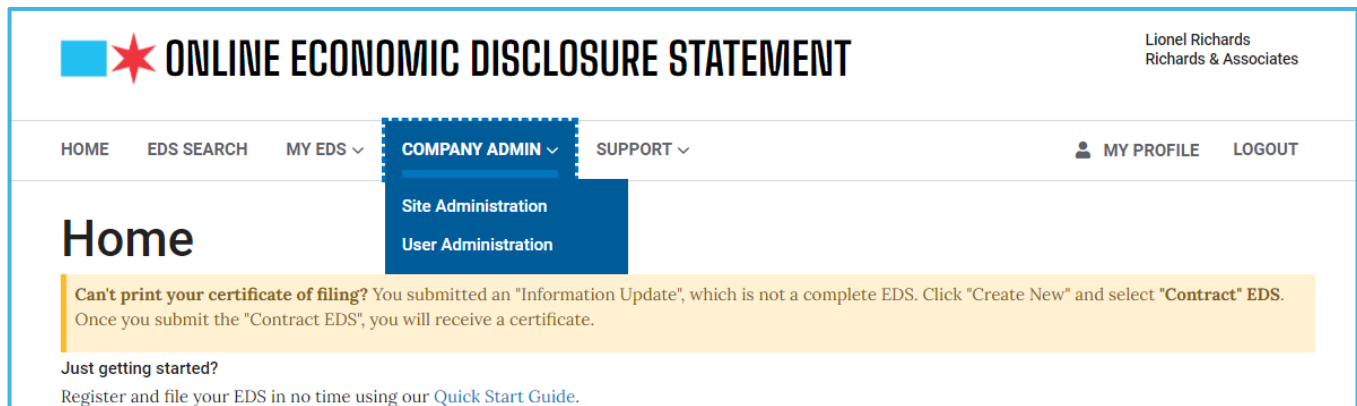

Figure 13: Company Admin menu for EDS Captain

If you are an EDS team member, then you will see the following links:

- **EDS Captains** – Allows you to view a list of the EDS Captains in your company and their contact information.
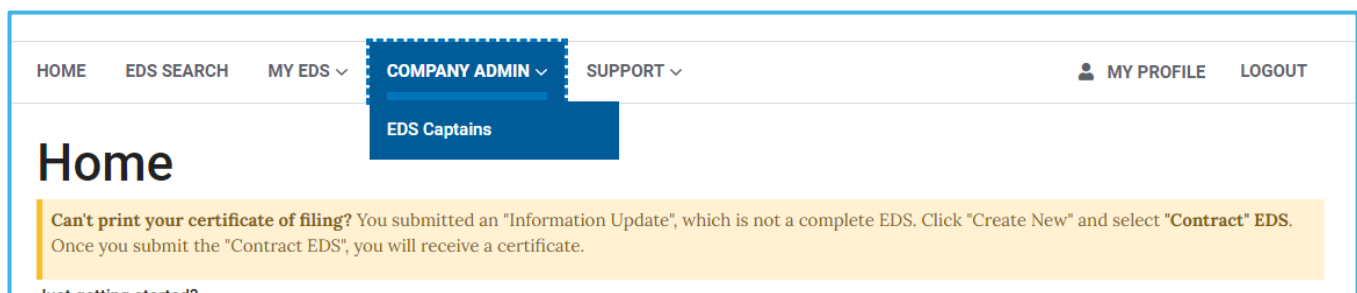

Figure 14: Company Admin menu for EDS Team Member

Definition of an EDS Captain - The EDS Captain manages the EDS team of a company. The EDS team is made up of everyone who can file an EDS document for a company. The first user representative of your company to register is the default EDS Captain. The EDS Captain has several rights and responsibilities:

- Online EDS will send other account applications for your company to you for approval.

- If you or another representative of your company wishes to file an EDS with a different office address, you will be responsible for updating online site/location information for the different offices of your company.

- 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 your company.

- You may deactivate the accounts of other Online EDS users who have left your company or no longer have responsibilities for filing EDS documents.

- In addition, as an EDS Captain, you will be able to file Online EDS documents as a representative of your company.

6.1 Site Administration
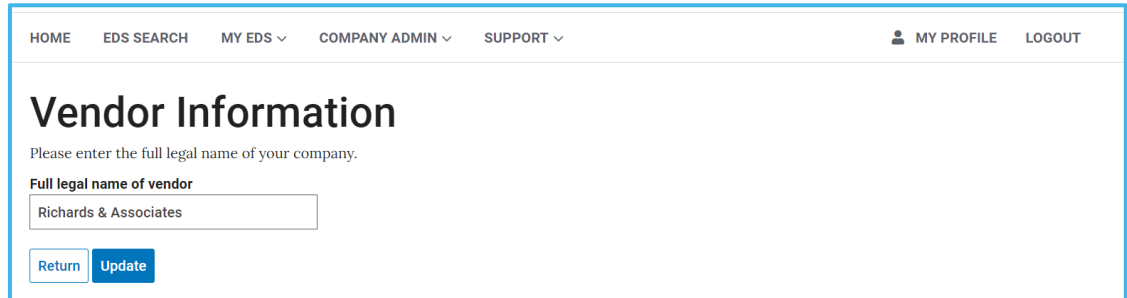

Figure 15: Site Administration screen

A. **Edit Company Name** – Follow these steps to change your company name:

1. Click on the Edit button to the right of your company name.

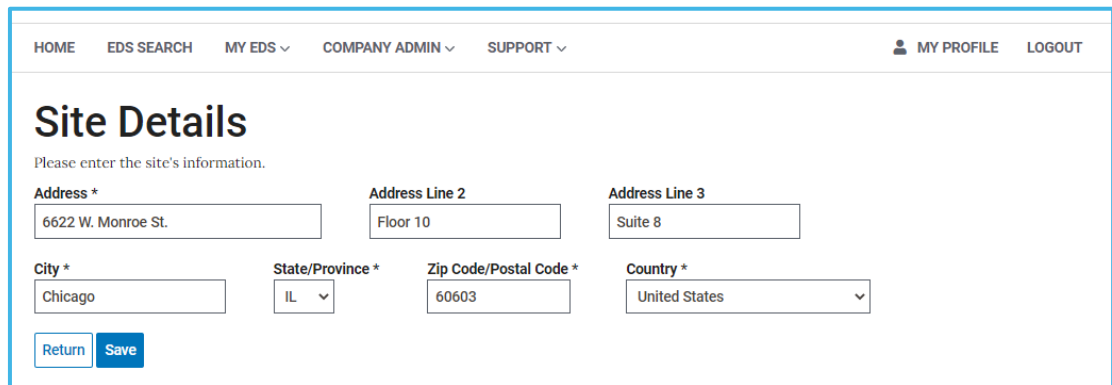2. On the "Vendor Information" screen, change the vendor name in the textbox.

   <u>NOTE</u>: The Vendor Name must be your company's full legal name. If it is not, please making the appropriate revisions. If your company name is changing to due a merger, acquisition, or other legal transactions that changes your FEIN then you may NOT change the vendor name here. You must register as a new vendor using your new company name and new FEIN.

3. Click "Return" to end the update or click "Update" to save the changes.

4. On the Site Administration screen, verify that the company name is correct.

B. **Edit Primary Site** – The primary site is the default address for EDS filings for your company. Follow these steps to change your primary site details:

1. Click on the Edit button to the right of the primary site.

2. On the "Site Details" screen, change site address in the appropriate textboxes.

3. Click "Return" to end the update or click "Save" to save the changes.

4. On the Site Administration screen, verify that the site information is correct.

C. **Manage Other Sites** – These sites may be selected during EDS creation. Follow these steps to manage non-primary sites:

- <u>Delete Site</u>

  1. Click on the Delete button to the right of a non-primary site you wish to delete.

  2. On the "Confirmation" pop-up, click "Confirm" to delete the site, or click "Cancel" to end the deletion.

  3. On the Site Administration screen, verify that the site is not displayed.

- Edit Site

  1. Click on the Edit button to the right of a non-primary site you wish to update.

  2. On the "Site Details" screen, change site address in the appropriate textboxes.

  3. Click "Return" to end the update or click "Save" to save the changes.

  4. On the Site Administration screen, verify that the site information is correct.

- Add New Site

  1. Click on the "Add New Site" button at the bottom of the screen.

  2. On the "Site Details" screen, enter site address in the appropriate textboxes.

  3. Click "Create" to save new site information or click "Return" to end update.

  4. On the Site Administration screen, verify that the new site information is correct.

6.2 **User Administration**

EDS Captain(s) may perform the following actions on user accounts:

A. **Approve or deny registration requests.** EDS Captain(s) may approve or deny registration request(s) on the Pending Registration section of the screen. The EDS Captain is notified via email when a user registers for a new account. All pending user account registrations are listed on the Pending Registrations section. If there are no pending registrations, then "*There are no pending registrations*" is displayed.

EDS Captains may take the following actions on each pending registration request:

Approve registration. To approve a user registration, follow these steps:

  1. Click the 'Approve' button in the Actions column of the user account you wish to approve.

  2. Click 'Confirm' button on the pop-up window to confirm your decision.

Deny registration. To deny user account registration, follow these steps:

  1. Click the 'Deny' button in the Actions column of the user account you wish to deny.

  2. Click 'Confirm' button on the pop-up window to confirm your decision.

NOTE: The user will be notified via email of your decision.

B. **Manage approved users**. Assign/remove EDS Captain rights, activate/deactivate user access to the Online EDS system, and view user account details.

Assign or remove EDS Captain rights. The EDS Captain(s) may add or remove EDS Captain rights from a user's account. If the EDS Captain checkbox is checked, then the user account has been given EDS Captain rights.

  1. Click on the "EDS Captain" checkbox of the user account row to assign or remove EDS Captain rights.

  2. Click "Update" button.

Activate or deactivate user access. EDS Captain(s) may activate or deactivate a user's account. If the Active checkbox is checked, then the account is active.

Figure 16: User Administration screen

NOTE: The EDS Captain should deactivate a user who has left the company or a user who is no longer authorized to submit EDS documents on behalf of the company.

1. Click on the Active checkbox of the user account row to activate (checked) or deactivate (unchecked).
2. Click "Update" button.

Users with inactive accounts will receive the following error message when they attempt to log into the Online EDS system "**Inactive users cannot log in**".

View user details. EDS Captain(s) may view user information of existing users, such as title, email, phone, and fax.

C. **Manage rejected users**. EDS Captain(s) may approve a previously rejected registration request. EDS Captains may take the following actions on a rejected registration request:

Approve registration. To approve a user registration, follow these steps:

3. Click the 'Approve' button in the Actions column of the user account you wish to approve.
4. Click 'Confirm' button on the pop-up window to confirm your decision.

NOTE: The user will be notified via email of your decision.

6.3 EDS Captains

The EDS Captain link is available to non-captain users. It provides a list of all EDS Captains within your company and their contact information.

Figure 17: EDS Captains screen