



Instructions to set up new users in the ELANY Electronic Filing System (EEFS)

1. **Log into EEFS** with your admin user ID and password.
<https://eefs.elany.org/eefs/>
Contact ELANYHelpdesk@elany.org if you need help with the user ID or password.
2. **Click the Security tab** on the top menu to get the User Profile / Maintenance menu option.

ELANY
Excess Line Association of New York

Affidavits Invoicing Reporting **Security** Help Logoff

Security Profile Maintenance

Maintenance

User Profile

My Profile

Maintenance

Change Password

Profile Information Primary Contact Secondary Contact Users History Elect Submission Stamped Documents

License No: 519833 TEST BROKER

Profile Type: Member

Roles: Invoicing

3. **Click the User Profile / Maintenance option** in the left menu to get the User Profile screen.

ELANY
Excess Line Association of New York

Affidavits Invoicing Reporting Security Help Logoff

Security Profile Maintenance

Maintenance

User Profile

My Profile

Maintenance

Change Password

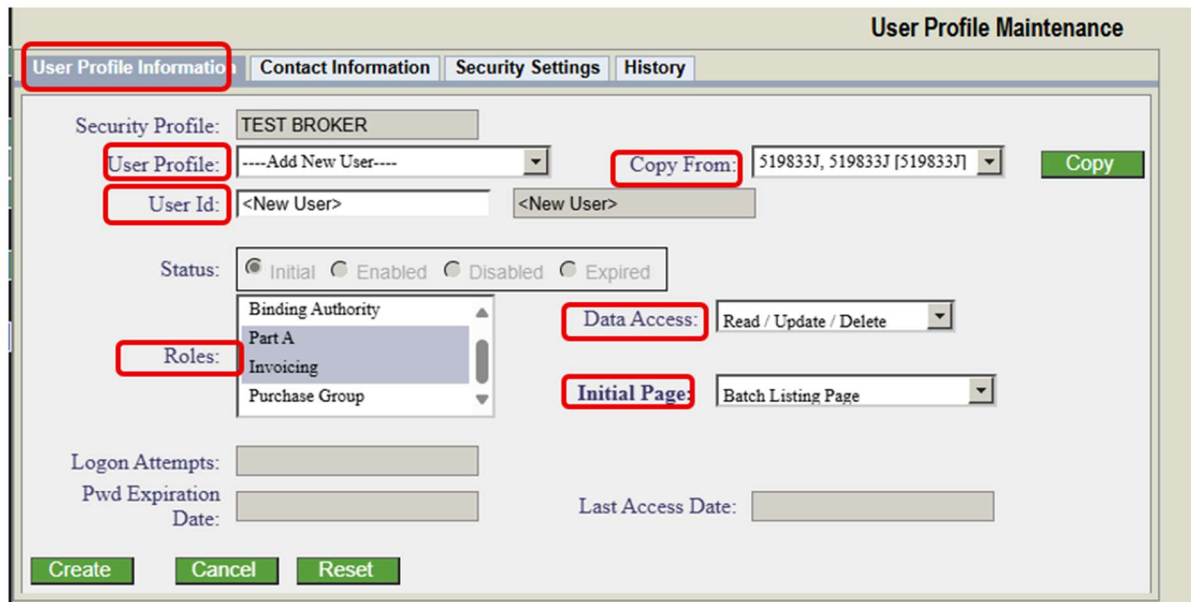
User Profile Information Contact Information Security Settings History

Security Profile: TEST BROKER

User Profile: BROKER, TEST [519833A]

User Id: 519833A TEST BROKER

4. User Profile Information



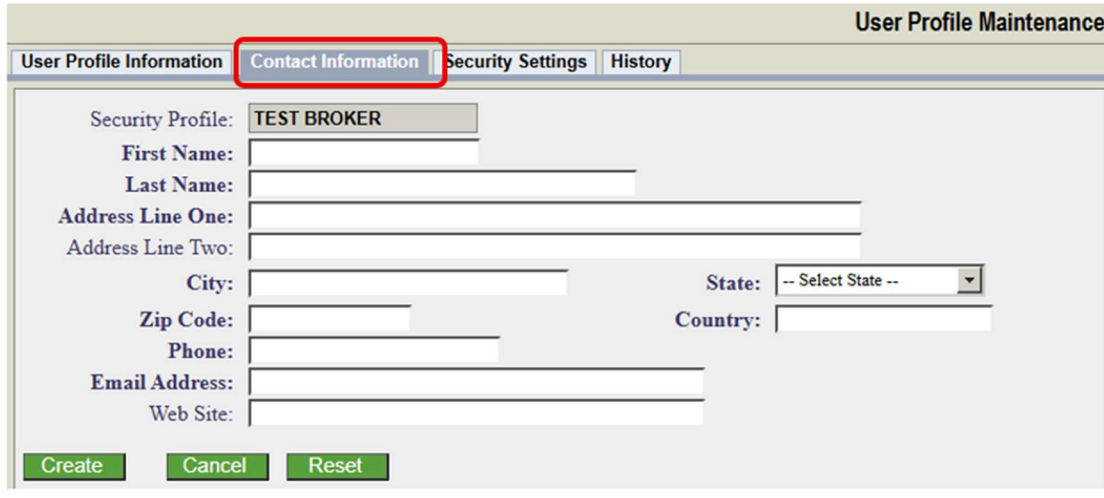
User Profile Maintenance

User Profile Information | Contact Information | Security Settings | History

Security Profile: TEST BROKER
 User Profile: Add New User
 Copy From: 519833J, 519833J [519833J] Copy
 User Id: <New User> <New User>
 Status: ☒ Initial ☐ Enabled ☐ Disabled ☐ Expired
 Roles: Binding Authority, Part A, Invoicing, Purchase Group
 Data Access: Read / Update / Delete
 Initial Page: Batch Listing Page
 Logon Attempts:
 Pwd Expiration Date:
 Last Access Date:
Create Cancel Reset

- **User Profile:** Select “--- Add New User”
- **Copy From:** Change if applicable
- **User ID:** Enter a new ID. Recommendation is the user’s first initial followed by last name. There can be no spaces, special characters, or email addresses. If the user ID already exists, a number can be added to the end to make it unique.
- **Roles:** Select the roles the user will perform. To select more than one role, hold down the CTRL key and click on the desired roles.
- **Data Access:** Change from “Read Only” if user needs to add, edit or delete data.
- **Initial Page:** Select “Dashboard” or “Batch Listing” depending on the user’s primary role.

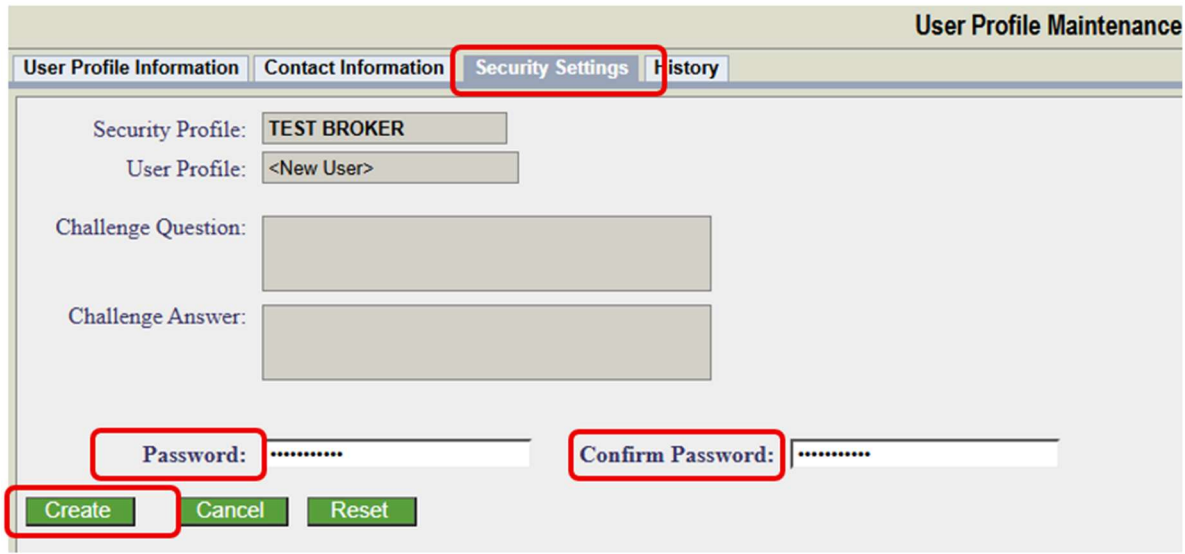
5. **Contact Information**



The screenshot shows the 'User Profile Maintenance' window with the 'Contact Information' tab selected. The 'Security Profile' is set to 'TEST BROKER'. The form includes fields for First Name, Last Name, Address Line One, Address Line Two, City, State (a dropdown menu), Zip Code, Country, Phone, Email Address, and Web Site. The 'Create', 'Cancel', and 'Reset' buttons are at the bottom.

- Bolded fields are required. Non-bolded fields are optional.

6. **Security Settings**



The screenshot shows the 'User Profile Maintenance' window with the 'Security Settings' tab selected. The 'Security Profile' is 'TEST BROKER' and the 'User Profile' is '<New User>'. The form includes fields for Challenge Question, Challenge Answer, Password, and Confirm Password. The 'Create', 'Cancel', and 'Reset' buttons are at the bottom.

- Enter temporary passwords in the Password and Confirm Password fields. These must match exactly.
- Click the Create button to save the User Profile.

7. **To create more logins**, click the User Information tab and repeat steps 4-6.



After creating the User Profile for a new user

**Broker
Administrator
will need to:**

Share the following with the user

- EEFS login <https://eefs.elany.org/eefs/>
- User ID
- Temporary password

**New User will
need to:**

- Log in to EEFS with their user ID and temporary password.
- Change the temporary password per EEFS prompt.
- Add the Challenge Question and Challenge Answer per EEFS prompt.