Excess Line Association of New York
EEFS/AEROS Administrator Quick Guide

This document includes instructions for managing user profiles (user logins) on ELANY's EEFS/AEROs system. Only users with the Administrator role can add or manage user profiles.

All users must have their own user profile for signing in to ELANY systems.

Administrator access to ELANY's portal is conditioned upon compliance with of the Terms of Use and Privacy Policy (www.elany.org/privacy-policy) as amended by the Portal Addendum (https://www.elany.org/portal-addendum-policy).

Administrators are responsible for

1. **Adding user profiles for users** who need to file Part Affidavits / Part C Affidavits / Purchasing Group transactions with ELANY, access invoices and invoice reports, upload binding authority documents, or have access to system-generated or ad hoc reporting; and
2. **Disabling user profiles** when a user has left the broker or third-party company; and
3. **Creating only user profiles for which the broker authorizes the user** to access data and documents specific to the broker.

Should an administrator have questions or be unable to perform the above requirements, please contact ELANY at ELANYHelpdesk@elany.org.

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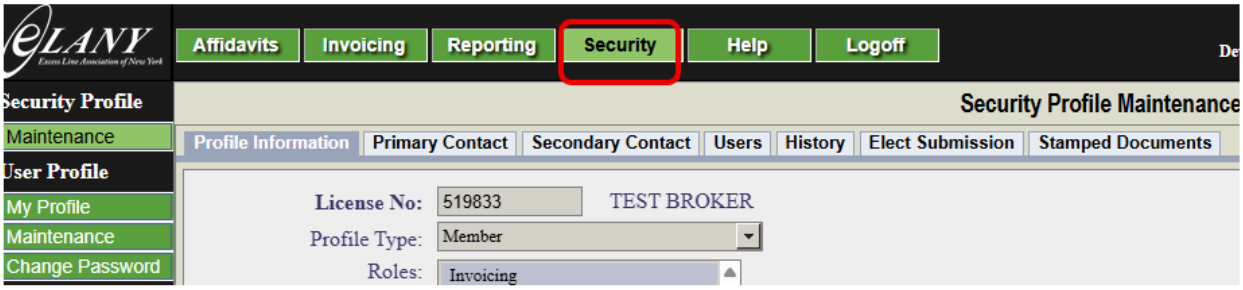
Setup New Users (create user profiles)

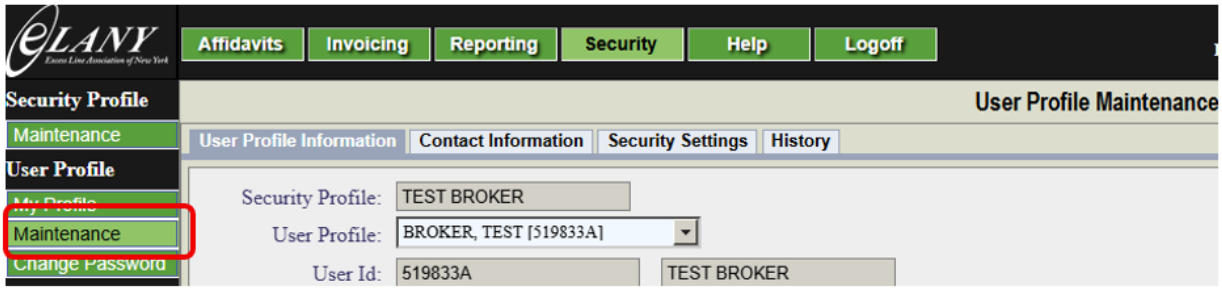
1. **Log into EEFS** with your admin user ID and password.
   https://eefs.elany.org/eefs/

   Contact ELANYHelpdesk@elany.org if you need help with the user ID or password.

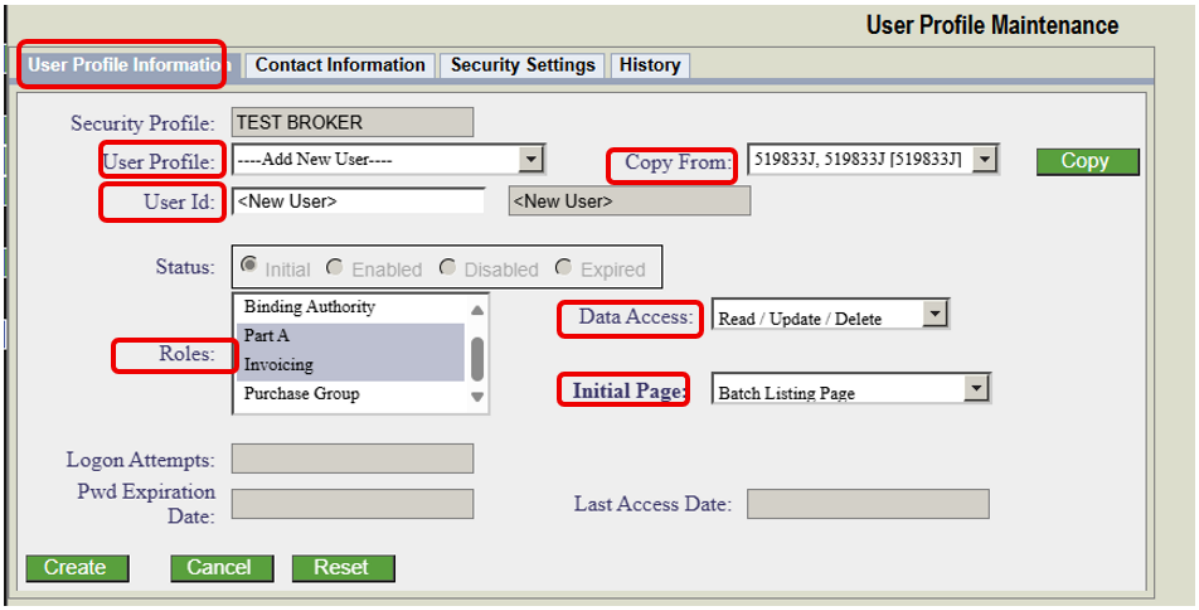
2. **Click the Security tab** on the top menu to get the User Profile / Maintenance menu option.



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



4. **User Profile Information**

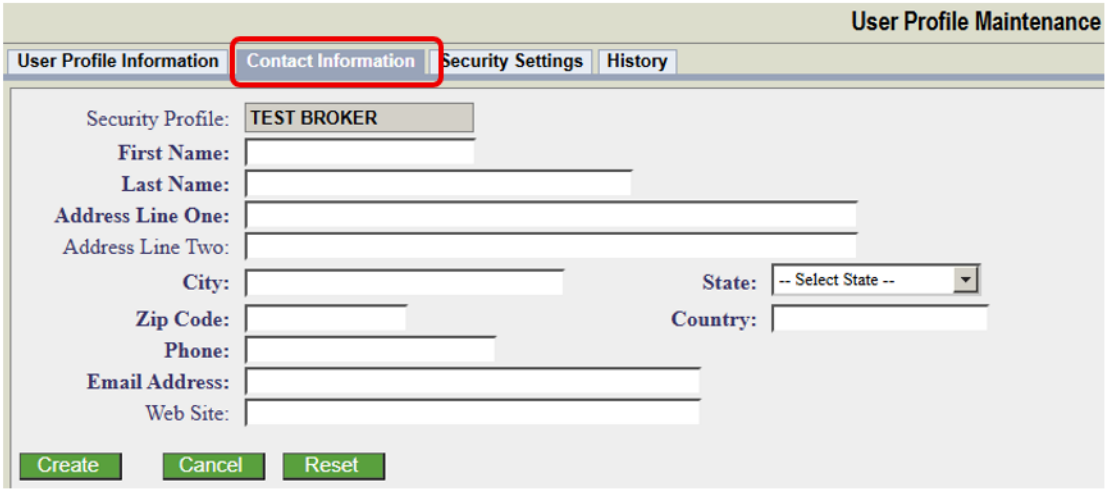


- **User Profile**: Select "--- Add New User"
- **Copy From:** Change if applicable
- **User ID:** Enter a new ID. Recommendation is the user's first initial followed by last name. There can be no spaces, special characters, or email addresses. If the user ID already exists, a number can be added to 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.

ROLE	RIGHTS	FIRM's CONTENT ACCESS
Administration	Add / edit user logins and primary contacts for the firm; Manage licensee pin codes; Set stamped document preferences	All data, documents, reports
Part A	Create / submit Part A Affidavit filings for stamping	All Part A Affidavit data, documents, reports
Part C	Create Part C Affidavits to share with E&S broker	All Part C Affidavit data, documents, reports
Purchase Group	Create / submit Purchase Group filings for stamping	All Purchase Group data, documents, reports
Invoicing	Access Invoices and invoice reports	All invoices, invoice reports
Binding Authority	Upload binding authority documents	Only submitted documents

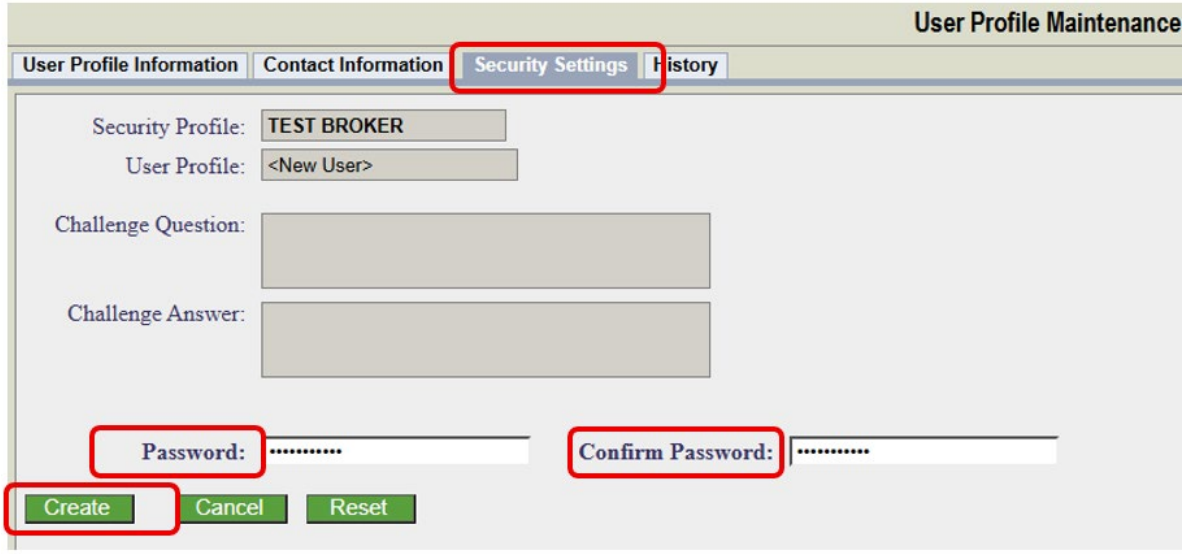
- **Data Access**: Change from "Read Only" if user needs to add, edit or delete data.
- **Initial Page**: Select "Dashboard" or "Batch Listing" depending on the user's primary role.

5. **Contact Information**



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

6. **Security Settings**



- 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.

Disable or Delete User Profiles

Broker Administrators are responsible for helping ensure the security and integrity of a broker's data and documents by disabling or deleting user profiles timely when

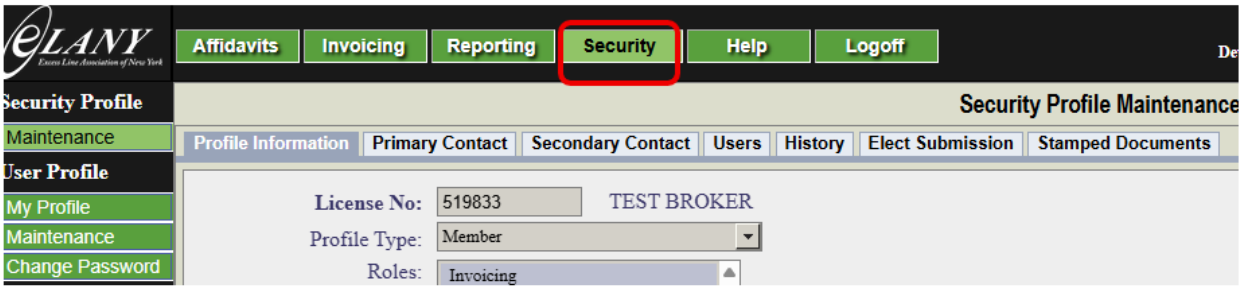
- A user has left a company, or
- A user has changed roles within a company and no longer needs access, or
- Any other reason the user no longer needs access.

Disable vs. Delete

- User profiles created and used to access the EEFS/AEROS system cannot be deleted; instead, they must be disabled.
- User profiles created but not used to access the EEFS/AEROS system should be deleted.

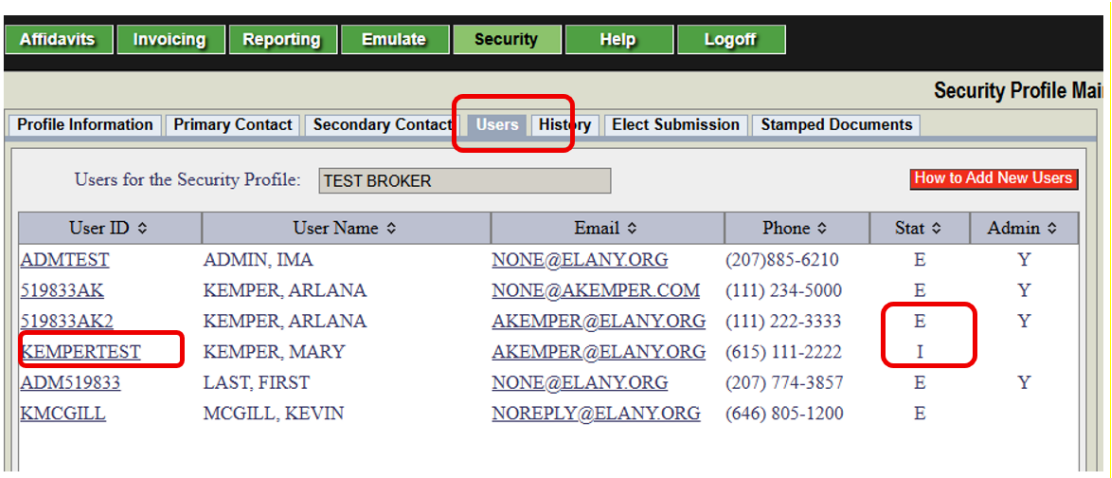
1. **Log into EEFS** with your admin user ID and password. https://eefs.elany.org/eefs/	Contact ELANYHelpdesk@elany.org if you need help with the user ID or password.

2. **Click the Security tab** on the top menu to get the User Profile / Maintenance menu option.



3. **Click the Users tab** on the sub menu to get a list of user profiles for the broker.
   - Profiles created but never used will have an 'I' (initial) in the status column.
   - Profiles created and used will have an 'E' (enabled) in the status column.

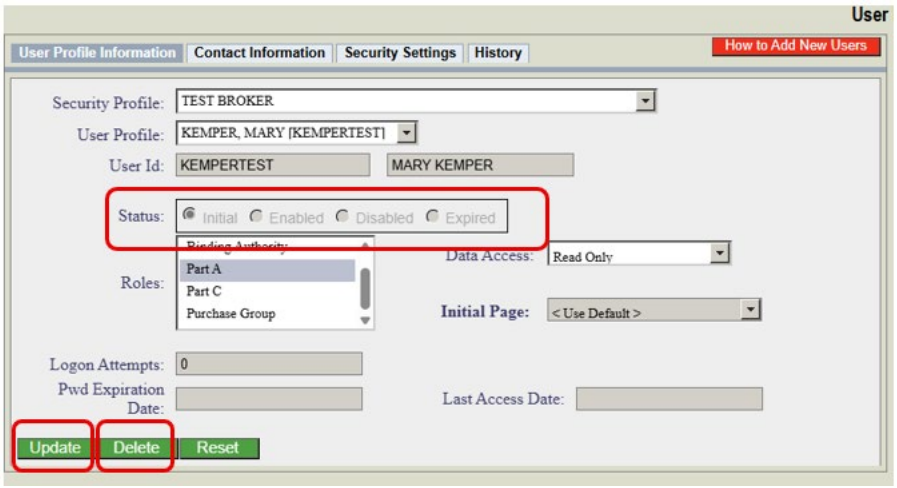
Click on the User ID to be disabled or deleted.



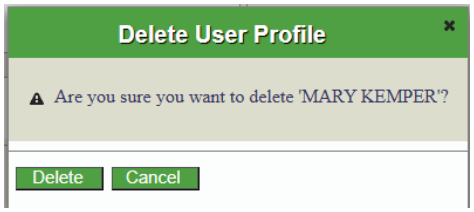
4. **User Profile Screen**

Status will be enabled for Administrators.

- To disable a User profile, choose the 'Disabled' status and click the green update button.
- To delete a User Profile, click the green Delete button.



For Deletes, a confirmation is required.



Re-enable User Profile

Broker Administrators are responsible for helping ensure the security and integrity of a broker's data and documents by

- Only re-enabling a user profile for a user who previously had access and is authorized by the broker to access the data and documents again
- Not re-enabling a User Profile for someone else to use. Instead, create a new User Profile for that person.

Follow the steps outlined in "Disable or Delete User Profiles," except choose status "Enabled."