TLOxp
Account Administrator Tips

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Introduction

This guide is designed to provide the Administrators (Primary, Account or Billing) with detailed instructions to perform critical functions such as setting up and maintaining users, defining or restricting account and data access, reporting on user activity, and performing billing-related functions. For detailed questions not addressed here, please reach out to your dedicated Account Representative.

Preferences

Click the Account Settings menu on the main navigation bar and select Preferences to make adjustments to your Account and User preference settings.

Account Preferences

Changes made by the Account Administrator to any Admin section settings will affect all users.

In this section, you can:
• Adjust the **Session Time Out** settings in TLOxp from **5 - 60 minutes**.

• Make it mandatory for all users to enter a **Reference ID** such as an **account**, **file**, or **case number** prior to executing a search or ordering report. Note: If you do not wish to make the Reference ID mandatory for all users, you can instead require it for individual User Group members.

• Allow or disable the ability to **Add Data**, use **Flash Copy**, **Copy Search Links**, or use **Popup Search Box Links** by checking or unchecking the appropriate fields.

• Allow **All Administrators** or select a specific Administrator to be notified of any **Password Reset Requests**.
My Account

History

As an Administrator, you can begin a targeted search on usage history for users by accessing the History option under the Account Setting > My Account menu.

You can search usage history by one or a combination of following options:

- **Date Range** – Click inside the field to enter a date range for your search.
- **Keyword** – Enter specific criteria used in a search (a name, SSN, address, etc.)
- **Search** – You can select a specific search or report to view usage history on (411+, Locate Asset Report, Bankruptcy, etc.).
- **Username/Email** – You can view history for an individual user by entering his/her username.
- **Reference ID** – If users enter a Reference ID (Case, file, or account number) you can search utilizing that data to limit the results.
- **Cost Center** – If you elected to require a Cost Center during new user creation, you can search results by Cost Center.
- **Summarize By** – You can include a summary displaying the total number of searches by Username, Reference ID, Search type, or Cost Center.
- **Clear/Search** – Click on the Search link to launch the search, or click on Clear Form to clear the search fields.
Once your search results are returned, you can choose the following additional options:

- **Transactions Per Page** – You can adjust the number of transactions displayed per page from 50-500.
- **Export to CSV** – Allows you to export search results to be used in a spreadsheet, such as Microsoft Excel.

Additionally, from the **Users** tab, you can view an individual user’s search history by clicking on the **View History** link for that user.

**Changing Your TLOxp Password**

To change your TLOxp password click on the **Change Password** option under the **Account Settings > My Account** menu.
A password window will appear, allowing you to change your current password. Click on the **Change** button after you have entered, and then retyped, your new password. Make sure to review and follow the requirements for creating a new password.
Details

The Details tab will display account and personal details.

Billing

View current balance and past invoices, set and update payment preferences such as credit card or bank ACH, make one-time payments, and set up recurring monthly auto-debit payments. Auto-debit is recommended to avoid potential account suspension due to late payments. To request a copy of an invoice not displayed on TLOxp, contact TLOxpBilling@transunion.com.

Pricing

View the current price list for all searches and reports.
Report Template

Each report can be customized to show specific or all information available in that report. The Report Template provides the option to create numerous report customizations for each report. Click on the Report Template option under the Account Settings > My Account menu.

Click on the link of the preferred report.

- Name the Report Template and check Public to provide it to all users in the account. Next, select Change Settings, to indicate the items to appear in the report.
• Once the settings have been selected, click the Close link on the settings page and then click Save to complete the template.

• The Report Templates will appear in the report section of the search results screen. To edit an existing Template, click the Edit button.

• Deselecting the Active checkbox will deactivate the Report Template for all users. Deselecting the Public checkbox will only allow the creator of the Report Template to view it.
Export Template

- The Export Template option gives you the ability to create a tagline and upload a logo to be used in your reports and exports.
- To add a tagline, simply fill the desired text in the field provided or leave the field blank and choose the default tagline. Click on Browse to choose a file to upload as a logo.
- Only one tagline and logo can be added to an account at any given time. Make sure that the Active checkbox is checked.
- You can modify the tagline and change the current logo by uploading a new logo at any time, or deselect the Active checkbox to prevent the current tagline and logo from being accessible to users when exporting and printing.
- Once you have added a tagline and logo your users can include them when exporting the results and reports by checking the appropriate box in Print and Export. The logo and tagline will be displayed at the top of the first page of the export print-out.
User Maintenance

As an Administrator, you have the ability and responsibility to **add users and user groups, edit an existing user's access** to searches and reports, **unlock accounts, reset passwords**, and **deactivate accounts**.

Creating New User Groups

As an Administrator, you can segment or customize access to TLOxp searches and reports by group, or whenever creating tiered access is necessary. Once a user is assigned to a User Group, his/her access will mirror that of the User Group.

Select the User Groups option under the Account Settings > My Account menu.

Click on the New User Group link.

Enter the name of the User Group in the Name field, then select the searches and reports to which you want this User Group to have access.
Control access and customize report content for the User Group by clicking on the Modify link to right of the each report. This will open the Report Manager window allowing you to select the categories you want included, and accessible, in that report. To restrict access to an entire report, click on the Clear All link, then click on the Close link.

When you are finished creating your User Group, make sure to click on the Save button to complete the process.
After a User Group has been created, users can then be assigned to the User Group. Under the User Groups tab click on the Manage Users link for that User Group.

Click on the box next to the name of each user you want to put in that group. Make sure to click the Save button once you have finished assigning users.

To remove a user from a User Group, uncheck his/her name and click on the Save button.
Creating New Users

As an Administrator, you have the ability to create new users, which includes setting desired access to specific searches and reports, resetting passwords, editing access for existing users, and unlocking or deactivating accounts.

To begin the process of creating and adding new users to TLOxp, click the Users options under the Account Settings > My Account menu.

- Click on the Add User link on the Users page.

- Complete the following fields:
  - Name – First & Last
  - Job Title – i.e. “Collector”
  - User Name – Minimum of 6 Characters
  - Email Address – Enter an email address for the user, or if the user doesn’t have access to email, enter the email address for the Administrator. The email address entered is where new passwords will be sent.
- **Cell Phone for SMS** – Required for all users to log in unless user’s IP address has been added to the account. To have IPs added to the account, send the IPs to TLOxpSupport@transunion.com.

- **Office Phone** – Optional

- **User Group** – Optional. The Add to User Group option will appear if you have created User Groups.

- **Cost Center** – Optional. The Add to User Cost Center option will appear if you have access to and created Cost Centers. *(We do not tell how to add or what a cost center is)*

- **Save** – Click the Save button at the bottom of the screen to move to the next step.

Once saved, confirm that the information is complete and accurate.

An email will be sent to the user’s email address with their user ID, password, and login instructions. A security email will be sent to the Administrator verifying the user has been added.

You can modify the list of searches and/or reports the user can access, copy setting from another user, change the user’s data masking settings, etc. by editing each of the sections listed below:

**User Profile Section**

Click the **Edit** button in the lower right corner of the **User Profile** section to update the user’s first and last name, change an email address or phone number, or change the group or cost center to which the user belongs.

![Add User Form](image-url)
Copy User Settings Section

(Add: if adding many users we recommend User Groups to manage user permissions. With User Groups, permission changes can be done for an entire group rather at once rather than each user individually.)

To save time creating new users, you can copy an existing user’s settings. Click on the drop down menu and select the name of the existing user to copy. If you use this function, the user you are creating will have access to the same searches and reports of the user you are copying.

NOTE: Make sure NOT to select an Administrator when copying rights for a standard user, otherwise, that user will have Administrator rights and functionality.

Access Rights Section

Certain accounts may have included the option to use the IDxp product. If so, this section can be edited by clicking the “Edit” button. Consult your Account Representative to discuss this option.

Per Seat Section

If your account is under a Per Seat contract, this section allows you to designate whether an individual user is included as a Seat on the contract. Including a user in a Per Seat contract is effective immediately, with a prorated charge for a seat added mid-month. Removing a user from a Per Seat contract takes effect at the beginning of the next billing cycle. If you elect not to include a new user in the Per Seat contract, any searches or reports run by that user will be billed transactionally. Contact your Account Representative with any questions about how your account is structured.
Data Rights Section

Click on the Edit button to set the view to FULL, PARTIAL, OR COMPLETE MASKING of Social Security Numbers, Dates of Birth, Driver’s License and License Plate data that are contained in search results and reports. Click the Save button after making your selections.

Module Rights Section

Step 1 - Click on the Edit button of the module rights section to assign the various searches and reports that will be accessible for this new user.
Step 2 – Check the boxes to select the searches and reports that you want this user to access. Unchecked searches and reports will not be available to the user.

Step 3 - Click the Modify link next to any report to customize specific access to report content. Unchecked items will not be available to the user. Make sure to click on the Close button once completed.

Step 4 – Click the Save button to save all changes.

Administrator Rights

You can select to make this user an Account Administrator or a Billing Administrator. Please be advised that by adding a user as an Account Administrator, they will have all the abilities of an administrator, such as modifying user preferences and deactivating users. Adding a
user as a Billing Administrator is highly recommended to ensure that he or she promptly receives the TLOxp invoices each month via email. Billing Administrators also have access to the Billing section of your account, where they will be able to view prior and current invoices and make payments. Note that the Billing Administrators also have the capabilities to run searches and reports; if you intend for them to access TLOxp only for Billing purposes, their access can be updated accordingly in the User Setup section.

### Preferences

To change or adjust a user’s preferences click the **Edit** button and make the appropriate changes – Click the **Save** button once completed.

### IP Access Rights

To view current IP Addresses OR allow a user to access TLOxp from external computers or “Unknown IP’s” click on the **Edit** button and check the **Allow to Login from Unknown IPs** box.
### IP Access Rights

**Allow to Login from Unknown IPs:**

- Yes

**Known IP Addresses:**
- Range: 10.100.116.22 - 10.100.116.22
- Range: 10.204.0.0 - 10.204.255.255
- Range: 10.216.147,102 - 10.216.147,102
Editing Existing User Groups

To change access to searches and reports for an existing User Group click on the **Edit Group** link for that user group. Once the user group’s profile opens, you can click the **Edit** button for each section you wish to change. Be sure to click the **Save** button for each section you make changes to.

![User Groups Table](image)

Editing Existing Users

The Users list displays only Active users by default. You can filter the Users list by All, Active, Deactivated, Locked, or Password Reset Request by clicking the appropriate link above the Search bar.

To change access to searches and reports for an existing User click the **Edit** link for that user. Once the user’s profile opens, you can click the **Edit** button for each section you wish to change. Be sure to click the **Save** button for each section you make changes to.

![User Accounts Table](image)
Resetting Passwords

To reset a password for a user who has forgotten his/her password, locate the user under the Users tab and click on the Reset Password link.

NOTE: Primary Administrators will need to call or email Customer Support to unlock or reset their password.

Phone: 800-856-5599
Email: TLOxpSupport@transunion.com.

An email with a new temporary password will be sent to the email address listed in the user profile. Once the user enters the temporary password, he/she will be prompted by the system to set up a personal password. Passwords must be at least 8 characters in length and must include letters, at least one number and at least one special symbol (#, $, @, etc.).
Unlocking Accounts

In the event a user’s account becomes locked, either due to inactivity (90+ days), or incorrectly entering a TLOxp password multiple times, as an Administrator, you can unlock the account. Under the **Users** tab you will see a key icon representing that this user’s account has been locked.

To unlock a user’s account, click on the **Unlock** link for that specific user.

**NOTE:** Primary Administrators will need to call or email TLO Customer support to unlock their account or reset their password.

**Phone:** 800-856-5599  
**Email:** TLOxpSupport@transunion.com
Deactivating Users

The account administrator is responsible for all users. If access should be removed for any user, the account administrator should deactivate those users right away. Any user can be deactivated by clicking on Deactivate in the Actions column in the Users Tab. To reactivate a user, simply click on Activate.

A popup box will open prompting you to confirm your action to deactivate the user. Click on the “OK” button to finalize the process. You will no longer see the user listed once this step has been completed. Once deactivated a user will no longer have access to TLOxp, however, you will still have access to search deactivated users’ history.

Deleting User Groups

In the event you need to delete a user group, locate the group under the User Groups tab and click Manage Users. Uncheck all users and click Save so that the group will be empty. Next, in the User Group list click on the Delete link to have this User Group removed.
Changing Search for People Options

As an Administrator, you can limit the amount of data returned in the Advanced People Search Results on an individual, or user group, level. Click on the **Edit** link for a user, or the **Edit Group** link for user groups.

When the User Profile or User Group opens, click the **Edit** button in the **Module Rights** section.

Click on the **Modify** link to the right of the **Search for People Options** field. This will open the **Search for People Options Manager** box.
Uncheck any category that you don’t want to be included in the Advanced People Search Results.

Click on Close when you are finished. Make sure to click on the Save button at the bottom of the Module Rights section to save any changes.
Configuring Use Certification Defaults

Administrators can configure default GLBA and DPPA Use Certifications selections for each User Group. Once configured, the defaults you choose will be pre-selected when the group members log into TLOxp.

Click the Account Settings option on the main navigation bar and navigate to My Account > User Groups. Locate the User Group you wish to configure and click the Edit Group link.

Scroll down to the Configure Use Certifications section and select the default GLBA and DPPA options for this user group.

When this group’s members log in to TLOxp, the default options will be pre-selected and the user can accept the default or choose a different option if needed.

Additionally, if required for Compliance purposes, you can restrict a user from changing the defaulted options during login by checking the Restrict users from changing during login option.

When this option is selected, the group members will only see the selected default during login and will not be able to change it.

NOTE: You must select at least one default GLBA or one default DPPA before checking the Restrict option. The restriction will only apply to a Use Certification category (GLBA or DPPA) where a default option is selected.
Configure Use Certifications:
Clear Selections

☐ Restrict users from changing during login

GLBA (Gramm-Leach-Bliley Act)

(3)(B) To protect against or prevent actual or potential fraud, unauthorized transactions, claims, or other liability
(3)(D) Use by persons holding a legal or beneficial interest relating to the consumer.
(3)(F) To comply with Federal, State, or local laws, rules, and other applicable legal requirements.
☐ No use permitted by GLBA.

DPPA (Driver’s Privacy Protection Act)

(3) Use in the normal course of business by a legitimate business or its agents, employees, or contractors, but only to verify the accuracy of personal information submitted by the individual to the business or its agents, employees, or contractors and, if such information as so submitted is not correct or is no longer correct, to obtain the correct information, but only for the purposes of preventing fraud by, pursuing legal remedies against, or recovering on a debt or security interest against, the individual.
☐ No use permitted by DPPA.