



TransUnion Direct Administrator Guide

Help Guide Topics

- [Welcome to TransUnion Direct](#)
- [Getting Started](#)
- [Managing Users](#)
- [Managing a Company](#)
- [Managing Locations](#)
- [Help Resources](#)

Welcome to TransUnion Direct

Welcome! Your organization has asked you to be an administrator for TransUnion Direct — a quick, easy-to-use, secure website that allows users to access TransUnion services right from their PC.

Who Should Use This Guide?

This guide is designed for both company and location administrators of TransUnion Direct. This guide will assist you with tasks that you must complete for the users at your organization, including resetting passwords, creating new users, and updating contact information for locations and users.

What You Need to Know

Below are a few concepts that you should be familiar with as you start your administration role on TransUnion Direct.

About User Roles

There are several available user roles on TransUnion Direct. A user often has several user roles. They include both company-level and location-level roles:

Company-level Roles

- **Company Administrator** — This role manages the site at the company level and at the location level and can also administer to all users within the company.
- **Company Activity Report User** — This role has the ability to run activity reports featuring activity data for all users and all locations within the company.
- **Batch User** — This role can submit files containing multiple subjects (aka batch orders) through the Portfolio Services control panel.

Location-level Roles

- **Location User** — This role can place orders for services via the Individual Services control panel.
- **Location Administrator** — This role manages the site at the location level and can administer to the users within that location only.
- **Location Activity Report User** — This role has the ability to run activity reports featuring activity data for that location or users within that location.

To assign user roles, see [Update a User's Company Roles](#) or [Update a User's Location Roles](#).

About Subscriber Codes

Subscriber codes are TransUnion-generated numbers that are used to track and manage the services your company purchases from TransUnion.

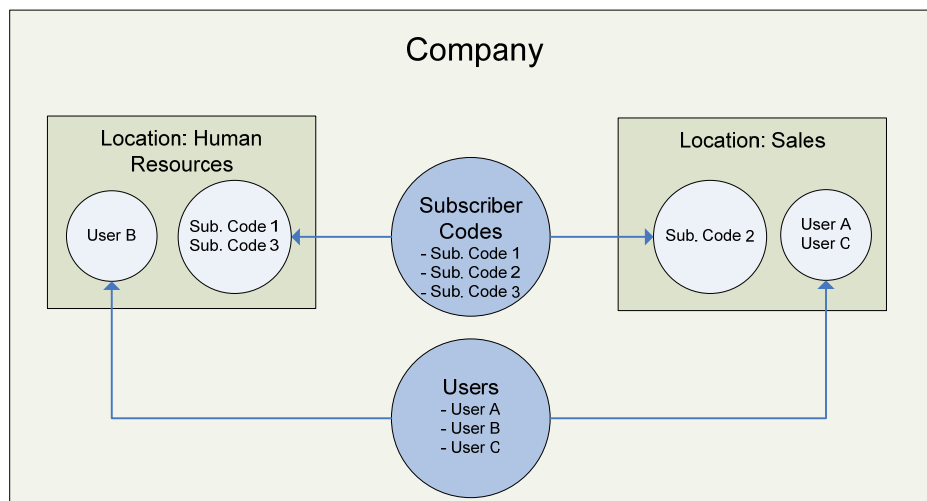
Each location should have at least one subscriber code assigned to it. When a user logs into TransUnion Direct, the user's default location and subscriber code take effect. The user can always see his or her current location and subscriber code on the left side of the page, under the Subscriber Settings heading.

About Companies and Locations

Companies are organizations that have signed a contract for services with TransUnion. A company can maintain multiple locations under its umbrella.

Company administrators define locations in TransUnion Direct. Locations are usually based on departments, such as human resources, or actual physical locations, such as a local bank branch. Users and subscriber codes, which are also under the company umbrella, are associated with locations. Thus, users that are associated with a location have access to the subscriber codes associated with that location. Both users and subscriber codes may be assigned to more than one location.

The following graphic demonstrates the relationships between companies, locations, subscriber codes, and users. After users and subscriber codes are assigned to locations in the graphic below, User B, who is in the Human Resources location, has access to Subscriber Codes 1 and 3, while Users A and C, in the Sales locations, have access to Subscriber Code 2.



Security

TransUnion Direct is designed to ensure a high level of security to protect the confidentiality of your organization's orders. Below are security features you should be aware of.

- **Secure Login** — TransUnion Direct prompts users to change their passwords every 90 days. Users can reset their own passwords. (Instructions can be found in the [TransUnion Direct User Guide](#).) You can also reset passwords for users through the Administration control panel. See [Reset a User's Password](#).
- **Challenge Question** — Users will be asked to set up a challenge question and response when they log in to TransUnion Direct for the first time. The challenge question provides extra security to the user's account and to the orders placed on the site. The user will be prompted to provide the response to the challenge question whenever he or she tries to view details of past orders, or when he or she resets his or her password. If a user forgets the challenge question, he or she can request to receive the question via email. (This option is available wherever a challenge response is requested.) If a user forgets the challenge response, you can reset the challenge question and response. See [Reset a User's Challenge Question and Response](#).
- **Timed Log Out** — If you are logged in but inactive for 25 minutes, a time-out warning appears, asking you if you would like to stay logged into the session. If you do not respond, you will be logged out of the session after another five minutes of inactivity. Any orders you placed during that session will be available in the Order History.
- **Digital Certificate** — Administrators are required to have a digital certificate. Your organization may also choose to require that users connect to TransUnion Direct using a digital certificate. The digital certificate acts as a pass key on the web browser for a specific workstation and user ID and provides extra security for transactions. Digital certificates cannot be shared by multiple user IDs. If a user uses multiple workstations, the user should download a copy of his or her digital certificate on each PC.

When setting up a location, the company administrator determines whether a digital certificate must be downloaded and whether the certificate download will require an administrator's assistance. If a digital certificate is required, then each user associated with that location will need to download a digital certificate when logging into TransUnion Direct for the first time. Instructions for downloading a digital certificate can be found online at TransUnion Direct.

Your Role and Responsibilities

As the administrator of your company and/or location, you are the first level of support for users at your company.

The next table lists company administrator and location administrator tasks.

Task	Why It's Important	Who Can Do This Task?
Manage locations, including: <ul style="list-style-type: none"> • Create new location(s). • Assign subscriber codes to a location. • Unassign subscriber codes from a location. • Remove locations from a company. 	By keeping location information up to date, you ensure that users always have access to the correct locations and subscriber codes.	Company administrator
Manage company and location administrator accounts, including: <ul style="list-style-type: none"> • Create additional administrators. • Upgrade a user to an administrator role or to a company activity report user role. • Assign users to additional locations. 	By managing administrator roles in a timely manner, you help ensure that proper personnel have access to administrator functions.	Company administrator
Manage users within your location, including: <ul style="list-style-type: none"> • Create new users. • Reset user passwords. • Disable, enable, or terminate user accounts. Assign and unassign users to a location user or location activity report user role.	By keeping user information up to date, you ensure that users have appropriate access to TransUnion Direct, ensuring that orders are placed securely and reducing the risk of fraud.	Company administrator Location administrator
Manage their locations, including: <ul style="list-style-type: none"> • Designate locations as requiring digital certificates and designate whether installation assistance for digital certificates is required at a location. • Edit location address. Designate or change the default subscriber codes for a location.	By keeping location information up to date, you ensure that users always have access to the correct locations and subscriber codes.	Company administrator Location administrator

Getting Started

If you are set up as a company administrator, you will receive two emails, one with your user ID and another with a temporary password. If you are a location administrator, you will receive an email about your role as an administrator. You should expect to receive your user ID and temporary password from another administrator.

Before logging into TransUnion Direct for the first time, check the system requirements, which are listed in the [TransUnion Direct User Guide](#), to ensure that your organization's workstations meet these requirements.

The first time you log in, a simple, four-step "Getting Started" process will assist you in setting up your user account, including the download of a digital certificate. After you log in, do the following:

1. Check your setup in the Administration section of TransUnion Direct. Use the links on the left side of the Home page.
 - Click **Manage Company** to make sure the subscriber codes you requested are listed.
 - Click **Manage Locations** to review the location that was set up. If necessary, you may add new locations.
 - Click **Manage Users** to create user IDs for employees within your organization who will be using TransUnion Direct.
 - After you create users, inform each new user of his or her user ID and temporary password.



Users can download the *TransUnion Direct User Guide* from the Resources section, by clicking the Help link on any page. The guide contains instructions on getting started, placing orders, and more.

TransUnion Direct Home

SUBSCRIBER SETTINGS

LOCATION
ADS TESTING
SUBSCRIBER CODE
DECISION SYSTEM (0622
M0605012)

Administration

- > Manage Users
- > Manage Locations
- > Manage Company

Use the control panels below for fast access to many of TransUnion Direct's powerful features.

Administration

Manage an Existing User

* Search By * Last Name

First Name

>> View all users

>> Create a new user

Search >>

2. If you've chosen to require digital certificates for a location, you may need to assist users in downloading the certificates.

Managing Users

In the Manage Users area of TransUnion Direct, you can do the following:

- Create a new user.
- Update details of an existing user.
- Disable or terminate an existing user account.
- Assign or unassign a user to a location and location roles.
- Reset a password.
- Reset a challenge question.
- View user audit information.

Create a New User

Role: Company Administrator, Location Administrator

From the Home page, click **Create a new user** from the Administration control panel. The Create New User wizard leads you through the process.

Step 1. Enter user details

Enter the name and contact information for the user. If the user should have a specific user ID, check the request box and enter a requested user ID. Click **Next**.

Login Information

Request that a specific user ID be assigned to this user

Requested User ID:

Step 2. Assign Company Roles

Role: Company Administrator (Location Administrators may assign the batch user role only)

If the user should be assigned the role of company administrator, company activity report user, or batch user, select **Yes**. For descriptions of the user roles, see [About User Roles](#).

If you select **Yes**, the Company Roles control panel appears. Select the appropriate roles for that user. Click **Next**.

Company Roles Option

* Would you like to assign company-level roles for this user? Yes No

Company Roles

* Roles:

Company Administrator

Company Activity Report User

Batch User

Step 3. Assign Location Roles

Assign the appropriate location role(s) for the user, including location user, or location administrator, or location activity report user, at the appropriate location(s). For descriptions of the user roles, see [About User Roles](#). You must select at least one role for at least one location. Click **Next**.



If you are a location administrator, you can only assign users to the location for which you are an administrator.

Step 4. Confirm User Information

Please review the details of the user. To make any changes, click the appropriate **Edit** button.

To save this user and retrieve login information immediately, click **Save**.

To save this user and create another user immediately before retrieving login information of all new users, click **Save/New**.

Save this information and view login details.	Save >>
Save this information and create another new user (login information for this user will be displayed when all new users have been added)	Save/New >>



A success message on the Company Users page displays the new user's user ID and temporary password. It is your responsibility to securely communicate the user ID and password to the user. You will be able to access the temporary password for this user ID in the User List until the user has logged in and selected a password of his own.

Update User Information



If you are a location administrator, you can update user information for users in your location only. Users in other locations will need to contact the administrators of their locations. In addition, you cannot update the information for company administrators in your location. Company administrators who need assistance need to contact another company administrator for assistance.

Role: Company Administrator, Location Administrator

Users can update their name and contact information in the Manage Profile section of TransUnion Direct. Update a user's name and contact information by following the steps below:

1. From the Home page, search for the user from the Administration control panel or click **View All Users** to see the entire list of users that you administer.
2. Click the **User ID** of the user whose details you need to update.

3. In the User control panel, click **Update**.

User		Update >>
Name		Contact Information
Full Name:	Martin X. Jones	E-mail address: mjones@company.com
		Telephone: 312-111-2222

4. On the Update User Details page, update the name, email address, and telephone, as necessary.
5. Click **Save**.

Disable or Terminate a User ID

Role: Company Administrator, Location Administrator

Disabling a user ID is not permanent. The disable option is used to temporarily stop access for a user, such as in the case of a leave of absence. The user ID may be enabled at any time, and the user's current password will still be applicable.

When you terminate a user ID, that user ID cannot be restored. If an employee leaves your company, TransUnion recommends that you promptly terminate the user's ID for TransUnion Direct.

1. From the Home page, search for the user from the Administration control panel or click **View All Users** to see the entire list of users that you administer.
2. To disable a user ID, find the user ID that needs to be disabled. Click the **Disable** icon for that user ID.

User ID	User Name	Roles	Status	Temporary PW	Modified	Shortcuts
bjones	Jones, Bobby	Location User.	New	Display		

3. On the Disable User page, review the user's details. Complete the process by clicking **Disable**.



If you need to terminate a user ID, click the Terminate icon . On the Terminate User ID page, review the user details and complete the process by clicking **Terminate**.

Enable a User ID

Role: Company Administrator, Location Administrator

When you enable a user ID, the user's most recent password is still applicable.

1. From the Home page, search for the user from the Administration control panel or click **View All Users** to see the entire list of users that you administer.
2. Find the user ID that needs to be disabled. Click the **Enable** icon for that user ID.

User ID	User Name	Roles	Status	Temporary PW	Modified	Shortcuts
bjones	Jones, Bobby	Location User.	Disabled	(not applicable)		

3. On the Enable User page, review the user's details. Complete the process by clicking **Enable**.

Assign a User to a Location

Role: Company Administrator

To assign a user to a location he or she is not yet a part of, follow the steps below:

1. From the Home page, search for the user from the Administration control panel or click **View all users** to see the entire list of users that you administer.
2. Click on the user ID to proceed to the User Details page.
3. Click the **Roles** tab.
4. Click **Assign**. The list of all available locations appears. Find the location to which you need to assign the user.
5. Check the appropriate user roles for that location. Click **Assign**.

User ID	User Name	Location User	Location Administrator	Location Activity Report User
jsmith01	Smith, Jane	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The user is added to the location's user list.

Update a User's Location Roles

Role: Company Administrator (For a user already assigned to a location, the location administrator may assign and unassign the roles of location user and location activity report user.)

To update a user's roles for a location that the user is already assigned to, follow the steps below.

1. From the Home page, search for the user from the Administration control panel or click **View all users** to see the entire list of users that you administer.
2. Click the **User ID** for the user who needs to be assigned a new role.
3. On the User Details page, click the **Roles** tab.
4. Click **Update** next to the location that the new role is associated with.
5. Check the appropriate roles. You can also unassign location roles from this user at the same time by unchecking roles.

Location Roles	
* Roles:	<input checked="" type="checkbox"/> Location User <input type="checkbox"/> Location Administrator <input checked="" type="checkbox"/> Location Activity Report User
To remove this user from all roles in this location, go to Unassign User Location Roles .	

6. Click **Save**.



To unassign a user from a location (remove this user from all roles at this location), select the checkbox next to the location and click **Unassign**. On the Unassign User Location Roles page, click **Unassign** to complete the process.

Update a User's Company Roles

Role: Company Administrator

A company administrator can update another company administrator's roles.

1. From the Home page, search for the user from the Administration control panel or click **View all users** to see the entire list of users that you administer.
2. Click the **User ID** for the user who needs to be assigned a new role.
3. On the User Details page, click the **Roles** tab.
4. Click **Update** in the Company Roles section.
5. Check the appropriate roles. You can also unassign company roles from this user at the same time by unchecking roles.

Update User Company Roles - login testing

Choose the company-level roles for this user and select Save.

Company Roles	
Roles:	<input checked="" type="checkbox"/> Company Administrator
	<input checked="" type="checkbox"/> Company Activity Report User
	<input checked="" type="checkbox"/> Batch User

6. Click **Save**.



To remove all company roles for this user, uncheck all the company roles and click **Save**.



Reset a User's Password

Role: Company Administrator, Location Administrator

Follow the steps below when you need to reset a user's password.

1. From the Home page, search for the user from the Administration control panel or click **View all users** to see the entire list of users that you administer.

2. Click the **Reset Password** icon for the user.

jsmith01	Smith, Jane	Location User. Location Activity Report User.	Active	(not applicable)	10/23/2007	   
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3. On the Reset User's Password page, review the user's details. To complete the process, click **Reset**.



The user's password is reset to a new temporary password. You will need to communicate this temporary password to the user. You will be able to view this temporary password until the user changes it. After the user logs in with the temporary password, he or she will be prompted to enter a new password. The user's previous password cannot be restored.

Reset a User's Challenge Question and Response

Role: Company Administrator, Location Administrator

If a user cannot recall the response to his or her challenge question, even after requesting the challenge question by email, you may reset the challenge question. Follow the steps below when you need to reset a user's challenge question.

1. From the Home page, search for the user from the Administration control panel or click **View all users** to see the entire list of users that you administer.
2. Click the **User ID** for the user.
3. On the User Details page, click **Reset Challenge Question**.

Security	
To clear the user's current challenge question and response, select the link on the right	
Challenge Question:	(not disclosed for security purposes) » Reset Challenge Question
Response:	(not disclosed for security purposes)

4. On the Reset User Challenge Question page, review the user's details. To complete the process, click **Reset**.



The user's challenge question has been cleared. The user will be prompted to select a new challenge question and response the next time the user logs in.

Managing a Company

In the Manage Company area of TransUnion Direct, you can do the following if you are a company administrator:

- View details on your company.
- Customize the display name of subscriber codes.
- Manage company-level roles for existing users.

View Company Information Details

Role: Company Administrator

1. From the Home page, click **Manage Company** under Administration on the left of the page.



2. You can view the company name in the Company tab, subscriber codes in the Subscriber Codes tab, and users who have been assigned company-level roles in the User Roles tab.

Customize the Display Name of Subscriber Codes

Role: Company Administrator

Selecting the correct subscriber code will be easier for your users if you customize the display name of the code to a name that will make sense to them. For example, for a subscriber code that is used for ordering collections services, change the display name to Collections Services.

1. From the Home page, click **Manage Company** under Administration on the left of the page.
2. On the Company Details page, click the **Subscriber Codes** tab. The list of subscriber codes is shown, along with each display name and active products that are linked to each code.
3. Click the **Update** link for the subscriber code with the display name you want to update.

- On the Update Subscriber Code page, enter the new **Display Name** in the Custom Subscriber Display Name box.

Subscriber Display Name

Enter a new subscriber code display name below. Select **Save** when you are finished.

* Display Name:

Save >>
Cancel X

- Click **Save**.

Manage Company-level Roles for Existing Users

Role: Company Administrator

- From the Home page, click **Manage Company** under Administration on the left of the page.
- On the Company Details page, click the **User Roles** tab. The list of users who are assigned company-level roles is displayed.
- To remove **all** company-level roles from a user, click the checkbox next to that user's name and then click **Unassign**. On the Unassign Company User Roles page, complete the process by clicking **Unassign**.
- To add user roles or unassign some of the user roles from a user, click **Update** next to that user's name. On the Update Company User Roles page, select the roles the user should be assigned (or unassigned) and click **Save**.

User

<p>User Details</p> <p>User ID: mjones</p> <p>Full Name: Martin X. Jones</p>	<p>Contact Information</p> <p>E-mail Address: mjones@company.com</p> <p>Telephone: 312-111-2222</p>
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Company Roles

* Roles:

- Company Administrator
- Company Activity Report User
- Batch User

Save >>
Cancel X



- For descriptions of these roles, see [About User Roles](#).
- Location administrators can assign the batch user role as well.

Managing Locations

In the Manage Locations area of TransUnion Direct, you can do the following:

- Create a new location for your company.
- Update details of an existing location.
- Update the certificate and/or installation status of a location.
- Assign a subscriber code to a location.
- Unassign a subscriber code from a location.
- Remove a location.

Create a New Location

Role: Company Administrator

From the Home page, click **Create a new location** from the Administration control panel. The Create New Location wizard leads you through the process.

Step 1. Enter Location Details

Enter the name and address of the location. The name you enter will be the location name displayed on the site.

Under Current Settings, select whether a digital certificate and installation assistance of that certificate is required. Click **Next**.



If you are unsure of whether a digital certificate or installation assistance is required, contact your information technology or information security departments.

Step 2. Select Subscriber Codes

Select the subscriber code(s) that should be available to this location. You must select one subscriber code as the default. Click **Next**.

Step 3. Assign User Roles

Select at least one user role for each user you want to assign to this location. Assign users to location roles on the Assign User Roles page. Click **Next**.

User Roles				
FIND USERS WHERE <input type="text" value="User Name"/> = <input type="text"/> , <input type="text"/> <input type="button" value="Find >>"/> <input type="button" value="Reset >>"/>				
Users 1 - 25 of 100 Page 1 of 8 < First < Previous Next > Last >				
User ID	Name	Location User	Location Administrator	Location Activity Report User
mjones	Jones, Martin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
jdonahoe	Donahoe, Jennifer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
vjordan	Jordan, William	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Users 1 - 25 of 100 Page 1 of 8 < First < Previous Next > Last >				

A user can be assigned to multiple roles, including location user, location administrator, and/or location activity report user. For definitions of these user roles, see [About User Roles](#). If a user should not be assigned to this location, do not make any selection for that user.

Step 4. Confirm Location Information

Review the information you entered for the location, including name, address, subscriber codes, digital certificate requirements, and users and their assigned roles. Click **Edit** to modify any of your entries.

To save the location, click **Save**. The location is added to the Company Locations list.

To save this location and add another location immediately, click **Save / New**.

Assign or Unassign Subscriber Codes for a Location

Role: Company Administrator

After you create a location, you may need to assign or unassign subscriber codes from that location.




If a new subscriber code is added to your company, a company administrator must assign it to the appropriate location. None of your users can access/ use a subscriber code before it is assigned to a location.

1. From the Home page, search for the location from the Administration control panel or click **View All Locations** to see the entire list of locations that you administer.
2. From the Company Locations list, click the name of the location you want to update. The Location Details page opens. Click the **Subscriber Codes** tab.
3. To assign another subscriber code to the location, click the **Assign** button. Select the checkbox next to that subscriber code and click **Save**.
4. To unassign a subscriber code from this location, click the **Unassign** link next to that subscriber code. Review the details of the subscriber code. Click **Unassign** to complete the process.

Update the Name and Address of a Location

Role: Company Administrator, Location Administrator

1. From the Home page, search for the location from the Administration control panel or click **View All Locations** to see the entire list of locations that you administer.
2. From the Company Locations list, click the name of the location you want to update. The Location Details page opens.
3. To update the name and address, click **Update** on the Location tab.
4. After completing your updates, click **Save**. The Location tab displays your location and the updated information.

Abandoned Users Print 

⚠ If you remove this location, the following users will be abandoned (have no location roles associated with them)
Please review this list carefully before continuing. You may wish to print it out so you may follow up for these users as appropriate.

John Bradford (jbradfo)	Valerie Maple (vmaple)	Charles Xavier (cxavier)
Harold Jarvis (hjarvis)	Darlene Robbins (drobbin)	Jennifer Zachary (jzachar)
Mary Livingston (mliving)	Stanley Stephenson (sstephe)	

4. Click **Remove**. The Locations page appears with a success message at the top.

Change the Default Subscriber Code for a Location

Role: Company Administrator, Location Administrator

After you create a location, you may need to set another subscriber code as the default.

1. From the Home page, search for the location from the Administration control panel or click **View All Locations** to see the entire list of locations that you administer.
2. From the Company Locations list, click the name of the location you want to update. The Location Details page opens. Click the **Subscriber Codes** tab.
3. To change the default subscriber code for a location, click the **Set default** link next to the subscriber code that should be the default.
4. A success message appears at the top of the page informing you that the subscriber code you selected has been made the default.

Help Resources

TransUnion Direct provides several paths to getting assistance:

- [Reset Your Password Online](#) — If you forgot your password or your login is locked, follow the instructions in the [TransUnion Direct User Guide](#).
- [Client Support Pages](#) — Common questions are already answered on the Client Support pages on TransUnion Direct. Client Support offers access to online User Guides and demos, FAQs, user tips, and news. Click **Help** at the top of any page on the site.
- Email from TransUnion Direct — TransUnion will communicate to you directly about new features, system maintenance times, and more. Look for news in your email inbox and make sure you can receive emails from the email addresses listed in the System Requirements section of the TransUnion Direct User Guide.
- TransUnion Service Desk — You can also call the TransUnion Service Desk at 800-813-5604. When calling the Service Desk, please make sure you have the following information: your user ID, subscriber code, and your company's name.