

THECB

EDC Portal User Guide

November 2019



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THECB CBPass

THECB uses the CBPass security management system to provide user access to the EDC Portal application. You must register with CBPass to access this application.

One individual from each institution will be designated as the **CB Delegate**. This person will be able to approve access to the EDC Portal via CBPass for each additional user. More information for CB Delegates can be found in the [EDC Portal Delegate Guide](#).

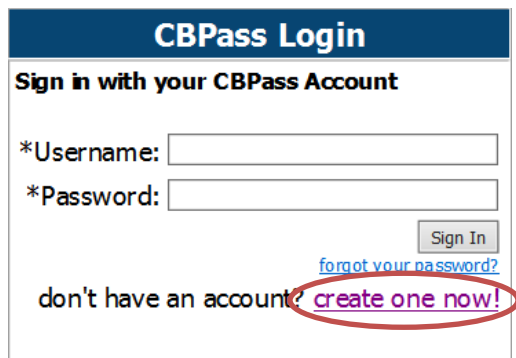
If you already have a CBPass account, you may skip this section and follow the instructions under *Requesting Access to the EDC Portal*.

To access CBPass, please follow these instructions.

1. Click on this link to go to the CBPass page:

<https://www1.thecb.state.tx.us/CBPass/>

2. Select the link to create a new account.



3. The CBPass – New User Registration page displays.
4. Enter your First and Last names.
5. Enter your Affiliation or Type Other – Your institution’s full name.

Note: The affiliation field shows institutions in our database as you type. Avoid typing “the” as the first word of your affiliation. Be specific in entering your institution’s full name in the affiliation field. For example, if your institution has multiple campuses, enter the full name, such as University of Houston - Downtown. Your e-mail address will become your login name for the application.

6. Enter your Physical Address.
7. Enter your Telephone Number.

CBPass - New User Registration

To create a CBPass account, enter the information below, then click on the *Register* button. Once you have registered you will be able to request access to applications.

All fields are required.

Account Information


*First Name [required]:

*Last Name [required]:

*Begin typing to enter/modify your affiliation or type "Other" [required]:

*Physical Address [required]:
, TX -

*Telephone Number [required]: () - -

Enter your fice code here. 

8. Enter your E-mail Address.

9. Enter your User Name – Used at login.

10. Enter your Password – Used at login.

Note: Passwords must be at least eight characters in length and contain at least three of the four following attributes:

- an uppercase letter
- a lowercase letter
- a number
- a special character

11. Enter the answer to the security math problem.

12. Check that you agree to the CBPass Account Agreement.

13. You must agree to the CBPass Account Agreement.

14. Click Register.

After you click the register button, you will also receive an acknowledgement e-mail. Note: If you do not receive the e-mail notification in a timely manner, please check your junk e-mail folder for this message.

*E-Mail Address [required]:

*Re-Type E-Mail Address [required]:

*User Name [required]: (Used for login)

*Password [required]:

Passwords must be at least eight (8) characters and contain at least 3 of the 4 following attributes: uppercase letter, lowercase letter, number, special character.

Password Strength: Weak Medium Strong

*Re-Type New Password [required]:

*Enter the answer to the math problem [required]: 9+8=

[required] I agree to the [CBPass Account Agreement](#) (link opens in a new window)



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15. Select three security questions to answer for password reset purposes. If you would like a different selection of questions to choose from, Click **Generate a new list of questions**. Once you have selected three questions, click **Continue**.

Important: All users must select and answer three security questions. Failing to do this will cause issues resetting your password in the future.

Please select 3 of the security questions below to be used for password reset and personal identification purposes:

Select

- What was the name of your first stuffed animal?
- What is the first name of the boy or girl that you first kissed?
- In what city did you meet your spouse/significant other?
- What school did you attend for sixth grade?
- What is your oldest brother's birthday month and year? (e.g. January 1900)
- Where were you when you first heard about 9/11?
- What is the name of a college you applied to but didn't attend?
- In what city or town was your first job?
- In what city or town did your mother and father meet?
- What is your maternal grandmother's maiden name?

16. Answer the security questions you chose and click Continue to create your account. Click Cancel to go back to the list of security question.

What is the first name of the boy or girl that you first kissed?

What school did you attend for sixth grade?

In what city or town was your first job?

17. Save your entries.

18. You may now access the desired THECB application using your current login name and password.

Request Access to the EDC Portal

When you log in to your CBPass account, the My Access tab appears. From this page, you can request access to an application. You can also search and view the current applications to which you have access.

1. Click on the **MyAccess** tab and then **Click to Request Access to another application**.

MY ACCESS PROFILE

Search for and view your current applications or request access to additional applications.

[Click to Request Access to another application](#) Instructions ?

Filters

App ID: App Name: Owner:

App Status: Access Status: Role:

Record Count= 2

App ID	Application Name	Owner(s)	Delegate(s)/Admin	Role	App Status	Access Status	
128	Accelerate Texas	Michael.Myers@THECB.state.tx.us, Michelle.Mindieta@THECB.state.tx.us		CBUser	Active	Approved	Remove Access
110	Accountability	Diane.Eargle@THECB.state.tx.us, Bill.Abasolo@THECB.state.tx.us, Jean.Zhao@THECB.state.tx.us, Mark.Kirksey@THECB.state.tx.us, Joseph.Dolan@THECB.state.tx.us		CBUser	Active	Approved	Remove Access

2. The request access window opens. Scroll through the **Select Application** dropdown list and select **EDC Portal**.

Request Access

Select Application:

3. Click **Request Access**. The system acknowledges your request and adds it to your access list with the status of **Requested**. This is the same process for CBDelegates as well as other users.

MY ACCESS PROFILE

View or update your profile.

Thank you for your request. It is in the process of implementation. You will be receiving an e-mail soon with further information.

[Click to Request Access to another application](#) Instructions ?

Filters

App ID: App Name: Owner:

App Status: Access Status: Role:

Record Count= 1

App ID	Application Name	Owner(s)	Delegate(s)/Admin	Role	App Status	Access Status	
150	EDC Portal	Michelle.Mindieta@THECB.state.tx.us, Rajeswari.Kandasamy@THECB.state.tx.us, Wendy.Turner@THECB.state.tx.us, Lloyd.Cooper@THECB.state.tx.us, Krishna.Ravipati@THECB.state.tx.us, Michael.Carrier@THECB.state.tx.us, kavitha.nomula@theb.state.tx.us, Kumara.Thatipelli@THECB.state.tx.us		CBUser	Active	Requested	Remove Access

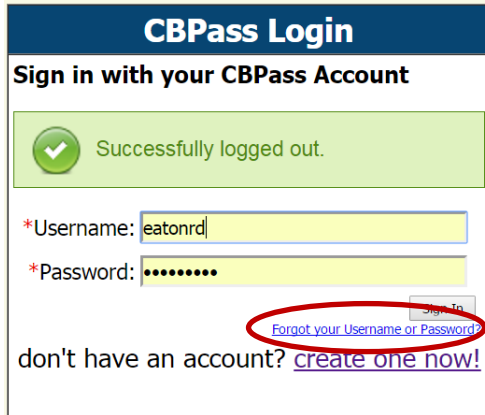
4. Once processed, you will receive an email stating your request status. For most users, access will be granted by the "CB Delegate" from your institution. If granted, you may then open the application by clicking on the application in the table on the My Access tab or by directly going to the application URL and logging in with your CBPass account.

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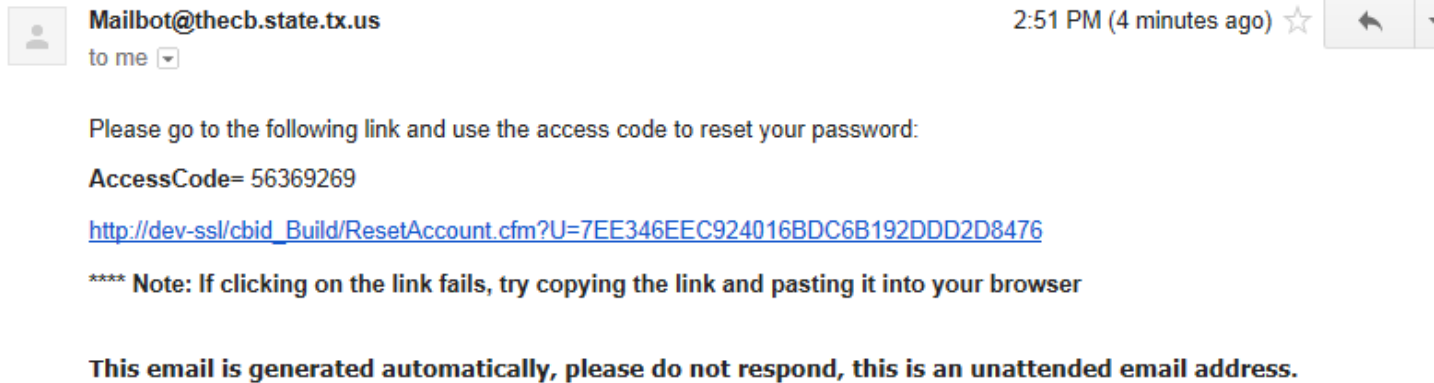
Forgot Password

If you have forgotten the password to your account, you can reset your password in a few simple steps.

1. Go to the CBPass login page.
2. Click **forgot your password?**



3. Enter your email, affiliation, and zip code. Hit continue.
4. Enter the answers to the questions you chose when you first registered.
5. Click **Continue** and the system sends an email to your email address with an access code you will need to reset your password. Not that this password is only good for 30 minutes. You must then request another
6. Go to your email address inbox and click on the email from Mailbot@thecb.state.tx.us. Note: If you do not see the email, check your spam box.
7. Click on the link in the email. It will take you to password reset page.



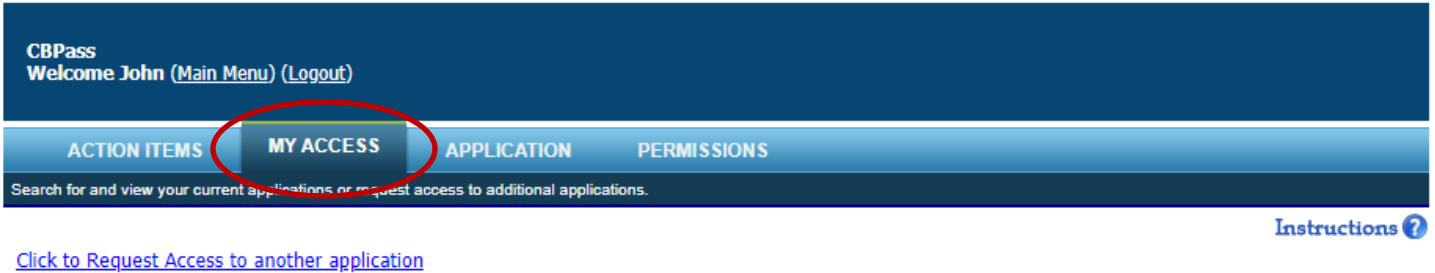
8. Enter the Access Code in the email in the Access Code field along with your new password in the appropriate fields. **Note:** Access Code is only good for 20 minutes.
9. Click Continue. You will be taken to the CBPass login page and you may now log in with your new password.



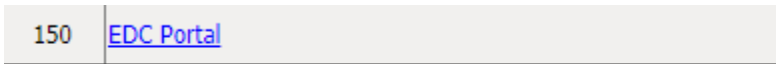
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Accessing EDC Portal

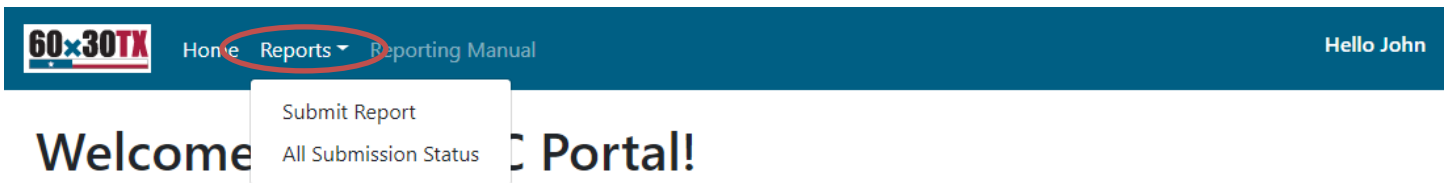
Once you have been granted access to the EDC Portal by the CB Delegate from your institution, you can log into CBPass and select **My Access** on the top left of the screen.



And select the application **EDC Portal**.



This will bring up the welcome screen where you can select to either submit a report or view submission results by selecting the **Reports** drop down menu.



Submit a Report



Under the **Reports** dropdown menu, select **Submit Report**.

60x30TX Home Reports Reporting Manual Hello John (Logout)

Submit Report
All Submission Status

Submit Report

Select file to upload

select file Browse

Upload File

Use the **Browse** button to select the file to be uploaded, and click **Upload File**.

Note: While the file is uploading, do not use the back button or navigate away!

60x30TX Home Reports Reporting Manual Hello John (Logout)

Submit Report

Select file to upload

CBM001_test.txt Browse

Upload File **Uploading file. Please wait for the confirmation page.**

Once the file has been fully uploaded, you will see a File Upload screen similar to the one below.

60x30TX Home Reports Reporting Manual Hello John

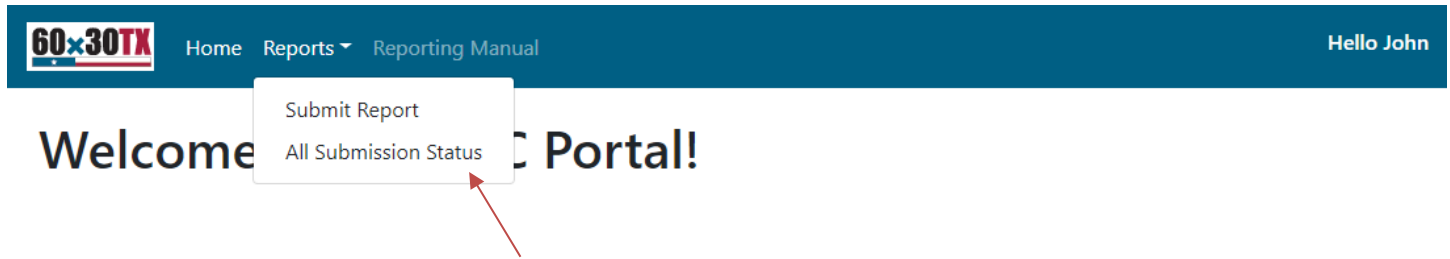
File Upload

File Name:	006662Galveston_Test_UpperDiv.txt
File Size:	1,727 bytes
Processing Time:	0 ms
Total Run Time:	83,100 ms

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View Submission Status and Edit Report

Under the **Reports** drop down, select **All Submission Status**.



On the following screen, click **Get Submission Status** to view the status of the submission. Large reports may take a few minutes to appear in the Submission Status table.

Report	Input File	Type	Year	Semester	Submitter Email	Date Submitted	Status	Records
View	Download	CBM001	2019	Summer1	Victor.Reyna@THECB.state.tx.us	08/29/2019 03:21 PM	Submitted	32,329

When the edit check is complete, you will be able to view the edit check report by selecting the **View** hyperlink.