THECB

CBPass Delegate Administrator Guide

October 2016
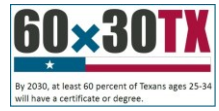
Contents

Access the CBPass System

Log in to CBPass page https://www1.thecb.state.tx.us/CBPass/. External users will log in with the username and password entered when creating a CBPass account. Click **Sign In**.

Internal THECB staff are provided access to CBPass as soon as an ADLDS account is created to access the agency's network system. Internal staff use THECB network usernames and passwords to sign into CBPass. (Internal users must contact the THECB Help Desk to manage ADLDS profile updates, system lockouts, or forgotten passwords.)

Create a new account

External users may create a new CBPass account by clicking the "**create one now!**" link. Enter information in each field. Passwords must be at least eight characters and contain three of four types of attributes: uppercase letter, lowercase letter, number, special character. After reading and checking the CBPass account agreement, click Register.

Access a CBPass application

After you receive access to an application, you may access the application two ways:

1. If you are accessing an application through an assigned URL, you can access the application after entering your CBPass credentials.
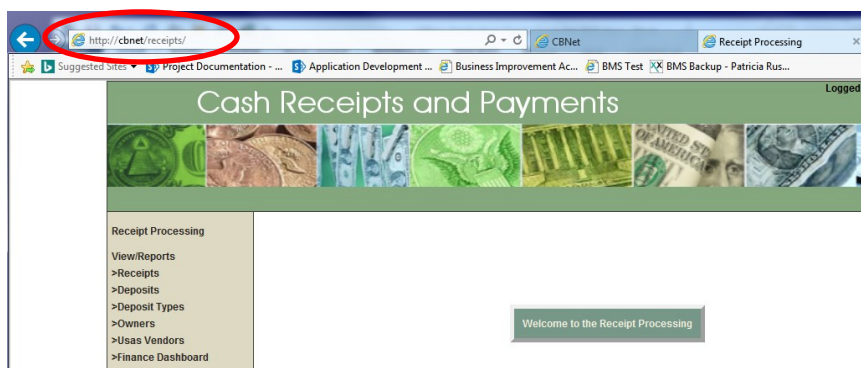
2. Use https://www1.thecb.state.tx.us/CBPass/ to return to the CBPass application. Navigate to the **My Access** tab and click on the application name to log directly into the application. (A complete description of the **My Access** module follows).

My Access

When you log in to your account, the My Access tab appears. Scroll the displayed list to view your applications and their status. Navigate to an application by clicking the desired **Application Name**. From this page, you can also request access to an application, search and view current applications to which you have access, or request to remove access to an application.

Search your access list

Search your applications using the filtering form at the top of the screen. You can filter with the following fields:

- Application ID Number
- Application Name
- Owner
- Application Status (All, Active, Inactive)
- Access Status (All, Requested, Approved, Denied, Removed, and Pending)
- Role (CBDelegate, CBUser)

Click **Run** to search or **Clear Filters** to reset the search values.

Export your access list

Click one of the three file format icons displayed to the right of **Export** under **Record Count**. Your list will export in the desired file format (CSV, PDF, or XLS).

Request access to an application

1. Click Request Access to another application.

2. The request access window opens.

3. Scroll through the Select Application dropdown list and select the desired application. The system can only process application at a time.

4. Click Request Access. The system acknowledges your request and adds it to your access list with the status of Requested.

5. Once your request is processed, you will receive an email stating that your request has been granted or denied. 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.

Remove access to an application

You may remove your access to an application if access is not required.

1. To remove your access to an application, scroll to the appropriate application row.

2. Click on the **Remove Access** link.

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	Requested	Remove Access
110	Accountability	Jean.Zhao@THECB.state.tx.us, Mark.Kirksey@THECB.state.tx.us, Joseph.Dolan@THECB.state.tx.us		CBUser	Active	Approved	Remove Access

3. A message box will appear. Click **OK** to remove your access, or click **Cancel** to exit and retain access.

4. If you click **OK**, the application status will change to **Removed**, and you can no longer access the application.

NOTE:

*   If you need to access the application in the future, you may request access to the application.

Profile

Click the **Profile** tab to view or change your current account information.

You may also change your password from this page.

Managing your Account Information

Your profile stores your:

- Name
- Affiliation
- Physical Address
- Telephone Number
- Email Address
- Login Name
- Login Password
- Security Questions

You may change any of the fields as needed by entering your current information and clicking **Save Changes**.

Note: If you change your affiliation, your access to your current applications will removed. You will need to request access to the applications you need again.

Password Change

You can change your password as needed. To change your password, follow these steps.

1. Type your new password into the field called Password and Re-Type New Password. (You must correctly type your new password into both fields or your password will not be updated.)
2. Click **Change Password** to update your password or click **Clear** if you do not want to save your new password.

   Note: Passwords must be at least *eight* characters and contain at least 3 of the 4 following attributes:

   - Uppercase Letter (ABC)
   - Lowercase Letter (abc)
   - Number (0123456789)
   - Special Character ($%!@^&*()?'|\/{}[]~=<>- +.,)

3. Select three security questions and click continue to enter your answers.

Update Password

*Password: _____
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: _____

[Clear] [Change Password]

Reset Security Questions (Please select 3 of the security questions below to be used for password reset and personal identification purposes:)
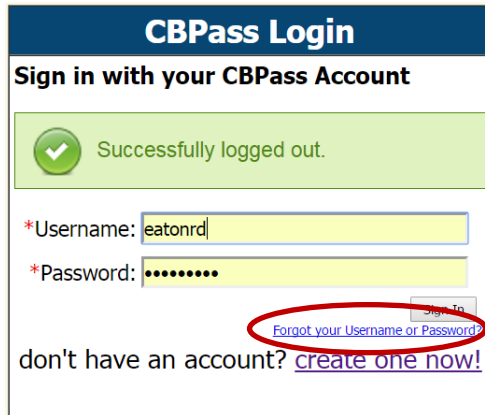
Select

☐ What was your childhood phone number including area code? (e.g. 000-000-0000)
☐ In what city or town did your mother and father meet?
☐ Where were you when you first heard about 9/11?
☐ What is your maternal grandmother's maiden name?
☐ In what city does your nearest sibling live?
☐ What is the name of the place your wedding reception was held?
☐ What school did you attend for sixth grade?
☐ Where were you when you had your first kiss?
☐ What is the name of a college you applied to but didn't attend?
☐ What is the first name of the boy or girl that you first kissed?

[Generate a new list of questions] [Continue]

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?**

CBPass Login

Sign in with your CBPass Account

✓ Successfully logged out.

*Username: eatonrd

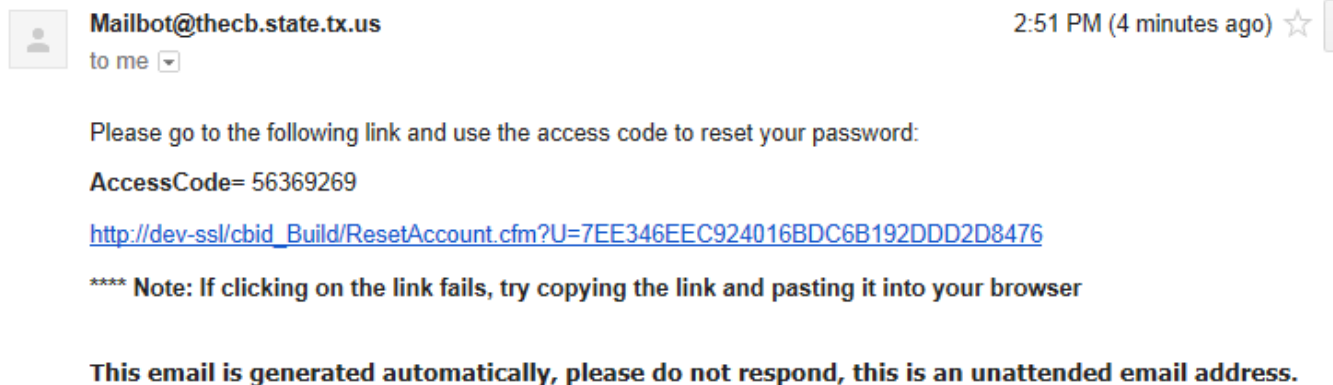*Password: ••••••••

Sign In

Forgot your Username or Password?

don't have an account? create one now!

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 an email will be sent to your email address with an access code you will need to reset your password.
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.

Mailbot@thecb.state.tx.us   2:51 PM (4 minutes ago) ☆

to me ▾

Please go to the following link and use the access code to reset your password:

AccessCode= 56369269

http://dev-ssl/cbid_Build/ResetAccount.cfm?U=7EE346EEC924016BDC6B192DDD2D8476

**** Note: If clicking on the link fails, try copying the link and pasting it into your browser

This email is generated automatically, please do not respond, this is an unattended email address.

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.

Action Items

On the Action Items page, a list displays all pending access requests to applications for which you have an administrative role.

Record Count= 6

Export: 📊 📄 📊

Requested By	Affiliation	App Name	Owner(s)	Request Status	Requested Date		
✉ Elena.Remedios@THECB.state.tx.us		EDRES	Doug.Parker@THECB.state.tx.us	Requested	07/25/2016	Approve	Deny
✉ John.House@THECB.state.tx.us		EDC Database Permissions	Mark.Kirksey@THECB.state.tx.us, Doug.Parker@THECB.state.tx.us	Requested	07/21/2016	Approve	Deny
✉ Lloyd.Cooper@THECB.state.tx.us		EDC Database Permissions	Mark.Kirksey@THECB.state.tx.us, Doug.Parker@THECB.state.tx.us	Requested	07/21/2016	Approve	Deny
✉ Michael.Myers@THECB.state.tx.us		EDC Database Permissions	Mark.Kirksey@THECB.state.tx.us, Doug.Parker@THECB.state.tx.us	Requested	07/22/2016	Approve	Deny
✉ Pam.Locust@THECB.state.tx.us		EDC Database Permissions	Mark.Kirksey@THECB.state.tx.us, Doug.Parker@THECB.state.tx.us	Requested	07/22/2016	Approve	Deny
✉ Quint.Vargas@THECB.state.tx.us		EDRES	Doug.Parker@THECB.state.tx.us	Requested	07/25/2016	Approve	Deny

Approve or deny user access

As an application owner, you will receive an email when someone requests access to your managed application. Follow these instructions to approve or deny access for your application.

1. Click on the **Action Items** tab, or follow the link provided in the emailed notification.

2. Application access requests awaiting your approval or integration appears.

3. Click **Approve** to approve an access request, or click **Deny** to reject an access request.

4. If you choose to grant access and there are multiple roles to assign within the application, a pop-up box will appear listing those roles. Choose the appropriate application role(s) for the user.

5. Click **Update**.

6. An email will be auto-generated and sent to notify the requestor that the request was accepted or denied.

   Note: As the application owner, you will receive a scheduled email reminder for pending access requests.

Search access requests

You may search requests using the filtering form at the top of the screen. You can filter for the following:

- Application name
- Requestor email address
- Access status (All, Requested)

Search for, view, or respond to application access requests.

Instructions ❓

Filters

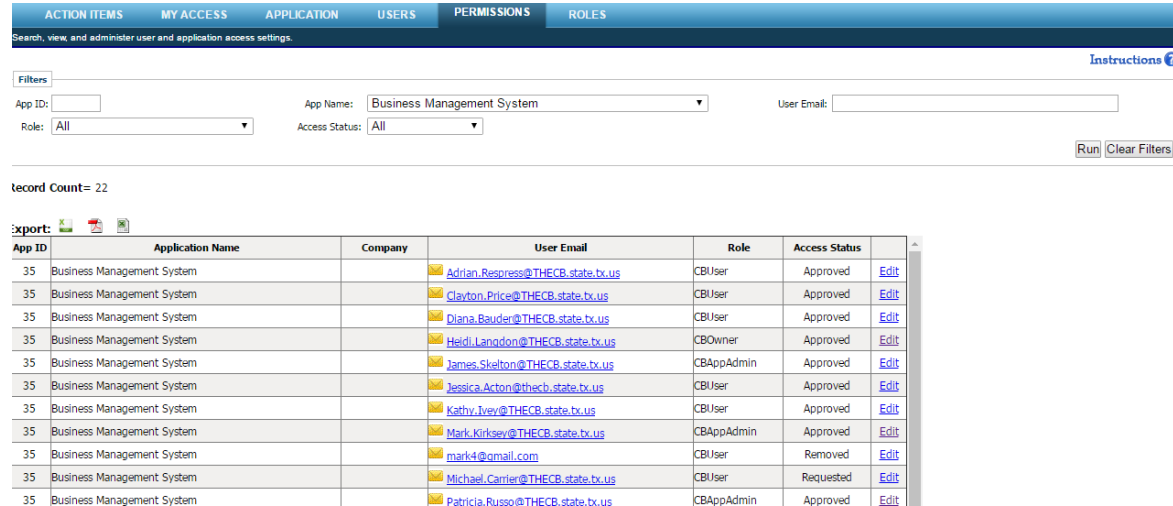App Name: All   Requestor Email: Access Status: All

Run   Clear Filters

Record Count= 0

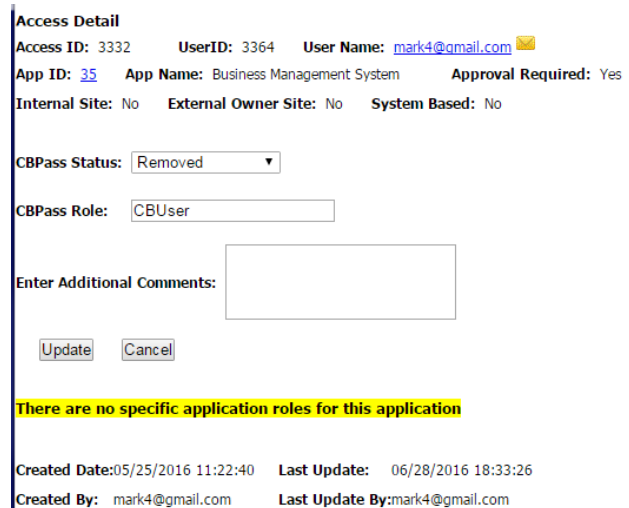No action items at this time for AdminApp@yahoo.com

Permissions

Application owners have access to update application user permissions. The Permissions tab also allows you to search, view, and administer user application access settings.

Manage permissions

1. In CBPass, click on the **Permissions** tab.

2. Search or scroll for your user and application using the filtering form at the top of the screen. See Search section below for details. If you hold privileged account access, the Permissions list will display after you perform a search.

3. Click **Edit** in the appropriate user row; the Access Detail window will display.

4. Select the desired **CBPass Status** from the drop down list choices (Approved, Denied, Removed, Pending Approval, Pending Removal)

5. Select the desired **CBPass Role** from the drop down list. Many CBPass applications do not have specific application roles, so application owners may be limited to entering only CBUser as a role.

6. You may enter comments in the **Enter Additional Comments** text box.

7. Click **Update** to save changes or **Cancel** to exit without saving changes.

Search for your application users

Search for a user using the filtering form at the top of the screen. You can filter with the following:

- Application ID Number

- Application Name

- User email address

- Role

- Access Status (All, Requested, Approved, Denied, Removed, Pending Approval, Pending Removal)

Click **Run** to search or **Clear Filters** to reset the search values.

Export the user list

Click one of the three file format icons displayed to the right of **Export** under **Record Count**. Your list will export in the desired file format (CSV, PDF, or XLS).

Record Count= 13

Export:

App ID	Application Name	Company	User Email	Role	Access Status	
35	Business Management System		Adrian.Respress@THECB.state.tx.us	CBUser	Approved	Edit
35	Business Management System		Clayton.Price@THECB.state.tx.us	CBUser	Approved	Edit
35	Business Management System		Diana.Bauder@THECB.state.tx.us	CBUser	Approved	Edit