

Managing the OBL User Profile

Lesson Objectives: Modifying a User Profile

- [Accessing the profile](#)
- [Updating the Personal Details](#)
- [Updating the Categories](#)
- [Changing the Password](#)

Lesson 2: Managing the OBL User Profile

Concepts ➤ As an OBL user, you have the ability to update your user profile. This may include changes to demographic information, notification preferences, password, service categories, etc.

Task A-1: Accessing the User Profile

During the registration process, information about the user and the types of service categories of which they wish to receive notifications about is collected. In addition to these demographics, the user will identify and set e-mail and password information. All of this data is used to create the **user profile**. The user profile is maintained or updated by the user, as necessary.



Scenario: As an OBL user, you are responsible for maintaining your user profile.

After logging in to the OBL, you will select the My Profile link from the Main Menu to view and update the user profile.

- ✓ Before you begin: Access the Internet and navigate to the URL for the Online Bidders List (<https://apps.ocfs.ny.gov/obl>).

What You Do

Comments/Prompts

Main Menu

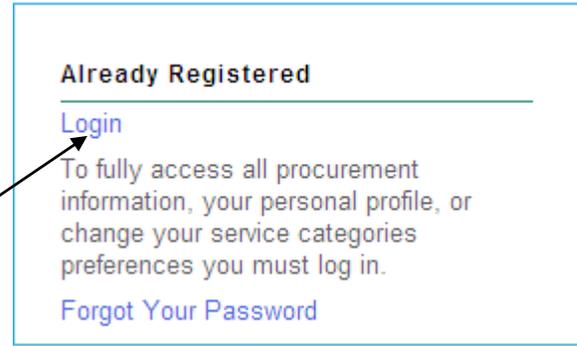
Login Link

Login Status

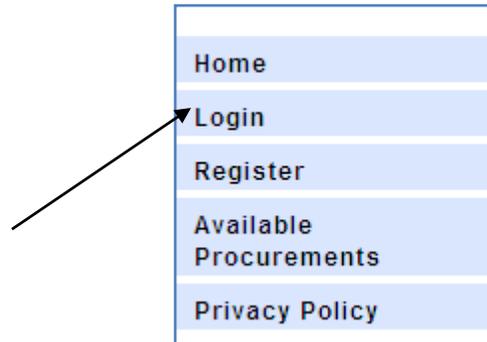
What You Do

1. Locate the **Login** links on the OBL home page. They can be found on the Main Menu and in the second column titled: **Already Registered**.
2. Click one of these **Login** links to log in to the OBL.

Comments/Prompts

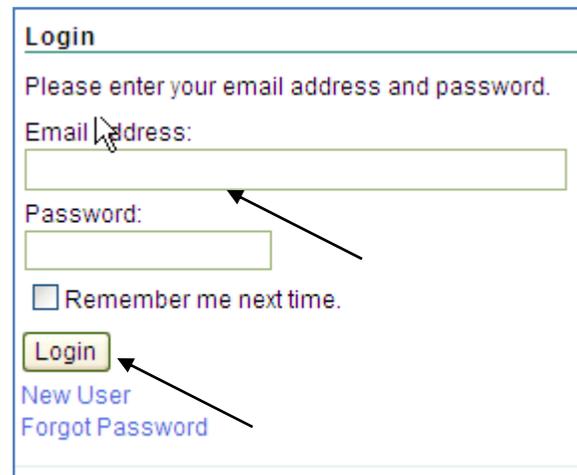


Or



The page will refresh and the OBL Login Page will be displayed.

1. Click on the E-mail Address text box.
2. Enter your username (E-mail address).
3. Press the **Tab** key to navigate to the next field.
4. Enter your password.
5. Click on the **Login** command button to log in to the OBL.



What You Do

In the figure to the right, the username and password have been entered.

The **Remember me next time** checkbox has also been selected. By selecting this checkbox the username information will be automatically populated next time you log on.

Comments/Prompts

Note: If you have forgotten your password, click on the blue [Forgot Password](#) link. By selecting this link, you will be guided through the steps to request a password reset.

After logging in to the OBL, you will be routed to the Online Bidders List Home page.

You are logged in as [McCain, Natasha]		
<ul style="list-style-type: none"> Home My Profile Logout Available Procurements Notifications Privacy Policy Reports Notification Recipients Search Admin Announcements Contact Types Eligible Applicants Fund Sources Letter Of Intent Screen Labels Target Population Vendor Service Areas User Roles 	<p style="text-align: center;">Online Bidders List (OBL)</p> <div style="border: 1px solid #ccc; padding: 10px; background-color: #e6f2ff; margin: 10px 0;"> <p style="text-align: center;">Welcome to the New York State Office of Children and Family Services</p> <p style="text-align: center;">Online Bidders List (OBL)</p> <p>OCFS is proud to launch the new and improved OBL. All current and future OCFS bidding opportunities will be available to the public under the Available Procurements link. User accounts from the former OBL will not be carried forward. Effective immediately OCFS will no longer be posting new bidding opportunities at the previous OBL website address, and the site itself will not be available after 10/20/2010. Users must register at this website to receive notifications of bidding opportunities based on the preferences selected at the time of registration. Users who register will also periodically receive important information about current bidding opportunities as well as general announcements about contracting with OCFS.</p> </div> <p>Welcome McCain, Natasha</p> <p>You have successfully logged on to the NYS OCFS Online Bidders List!!!</p> <p>Clicking on "My Profile", on the side menu, you will be brought to a new page. On this page, you will be able to:</p> <ul style="list-style-type: none"> Update your registration information by clicking on 'Personal Details'. Select Notification Preferences by clicking on the 'Categories' tab. The OCFS Online Bidders List sends automatic notifications for all Bidding Opportunities that meet the 	<p>Feedback</p> <p>User Feedback is Requested. Your opinion counts. Please contact us to let us know what you like and to suggest improvements.</p> <p>Email ocfscmsinfo@ocfs.state.ny.us</p> <p>Phone Albany area : (518) 474-8181 Toll free : (866) 708-0795</p>

What You Do

Comments/Prompts

1. To access your user profile, click the **My Profile** link on the Main Menu.



The page will refresh and the **My Profile** page will be displayed.

At the top of the **My Profile** page are three user tabs.

- **Personal Details** – used to provide user demographics.
- **Categories** – used to select service categories that match bidding opportunities.
- **Change Password** – used to reset a user password.

What You Do

Comments/Prompts

My Profile

Personal Details | **Categories** | **Change Password**

Fields marked with * are required.

Personal Details

Salutation:

First Name *:

Middle Initial:

Last Name *:

Organization Name *:

Communication Preferences

You will be automatically notified on bidding opportunities meeting the criteria you selected in the Categories section of your profile. You will be notified by e-mail unless indicated otherwise in the dropdown below.

Preferred Method of Communication *:

Potential Bidders will be notified of bidding opportunities as they become available.

Address Details

Phone Number: () -

Fax Number: () -

Street Address 1:

Street Address 2:

City:

State:

Zip Code:

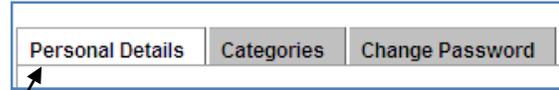
County:

Task A-2: Updating the Personal Details

What You Do

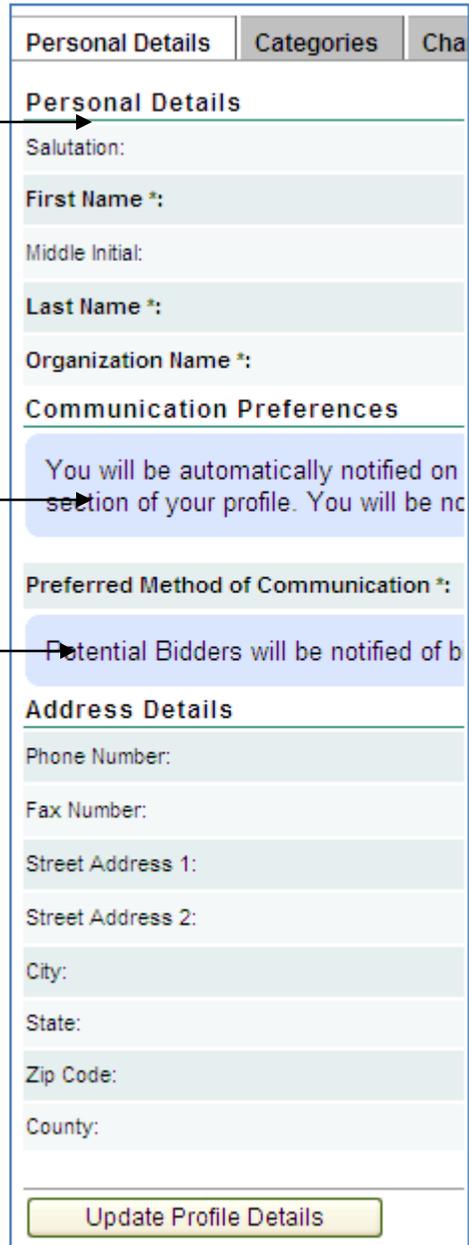
1. To update personal details, select the **Personal Details** tab.

Comments/Prompts



This tab will display the following data pertaining to your profile:

- **Personal Details** – name and organization.
- **Communications Preferences** – how the Online Bidders system should send notifications. The options for this setting are: E-mail or US postal mail.
- **Address Details** – this includes phone numbers, the mailing address and the county information.

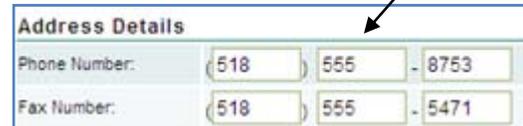


What You Do

Comments/Prompts

Details are modified by selecting a data entry area and making a change to the existing data. After changes are made, the **Update Profile Details** command button is selected and changes are saved to the user's profile.

For example: If a change was to be made to the phone number of the organization, select the **Phone Number** text box and type in the new phone number.



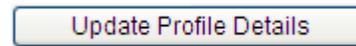
Address Details			
Phone Number:	(518)	555	- 8753
Fax Number:	(518)	555	- 5471

Personal Details	Categories	Change Password
Fields marked with * are required.		
Personal Details		
Salutation:	Ms. ▾	
First Name *:	Susan	
Middle Initial:	L	
Last Name *:	Kraft	
Organization Name *:	Bumble Bee Day Care	
Communication Preferences		
You will be automatically notified on bidding opportunities meeting the criteria you selected in the Categories section of your profile. You will be notified by e-mail unless indicated otherwise in the dropdown below.		
Preferred Method of Communication *:	E-Mail ▾	
Potential Bidders will be notified of bidding opportunities as they become available.		
Address Details		
Phone Number:	(518)	555 - 8753
Fax Number:	(518)	555 - 5471
Street Address 1:	52 Washington St.	
Street Address 2:		
City:	Rensselaer	
State:	New York ▾	
Zip Code:	12144	
County:	RENSSELAER ▾	
<input type="button" value="Update Profile Details"/>		

What You Do

2. After making changes to the Personal Details screen, click on the **Update Profile Details** command button to save the changes.
3. After a moment, the message **Personal details updated successfully** will be displayed in the upper right corner of the page.

Comments/Prompts

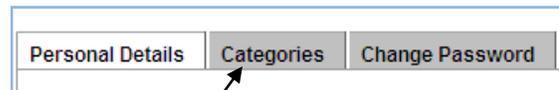


Task A-3: Updating the Categories

What You Do

1. Click on the **Categories** tab to view the currently selected service categories.
2. In the figure below, there are three service categories selected.
 - Child Care Services
 - Child Welfare and Community Services
 - Training and Development

Comments/Prompts



What You Do

Comments/Prompts

Personal Details Categories Change Password

Categories

- All Bidding Opportunities
 - Services Provided to the Public
 - Child Care Services
 - Child Welfare and Community Services
 - Juvenile Justice, Opportunities for Youth, and Workforce Development
 - Services for the Blind and Commission for the Blind and Visually Handicapped - Business Enterprise Programs
 - Services Provided to the State
 - Capital Services and Facilities Operations Support
 - Medical, Long Term Health Disabilities Assessment and Related Services
 - Information Technology, Administrative Services, and Organizational Development
 - Training and Development

Update Categories

3. Select (or de-select) service categories by clicking in the checkboxes located to the left of each service category.

In the figure to the right, two new categories were selected.

- Juvenile Justice, Opportunities for Youth, and Workforce Development
- Information Technology, Administrative Services, and Organizational Development

Categories

- All Bidding Opportunities
 - Services Provided to the Public
 - Child Care Services
 - Child Welfare and Community Services
 - Juvenile Justice, Opportunities for Youth
 - Services for the Blind and Commission
 - Services Provided to the State
 - Capital Services and Facilities Operatio
 - Medical, Long Term Health Disabilities
 - Information Technology, Administrative
 - Training and Development

4. Click on the **Update Categories** command button to save the changes to the user profile.

Update Categories

What You Do

- Beneath the **Update Categories** command button, the status will show: Updating Category Details.....

After a moment the message **Categories updated successfully** will be displayed in the upper right corner of the page.

Comments/Prompts

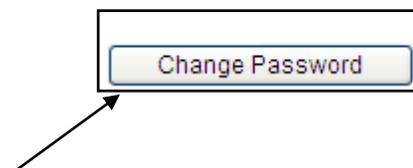
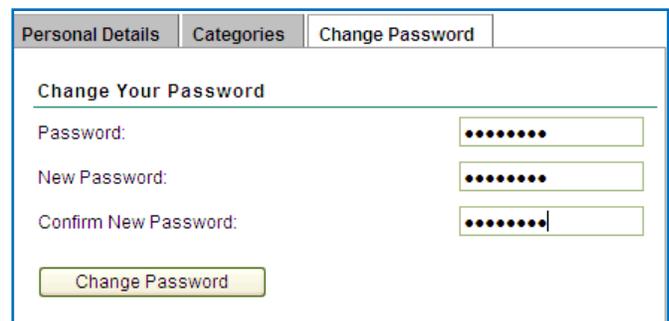
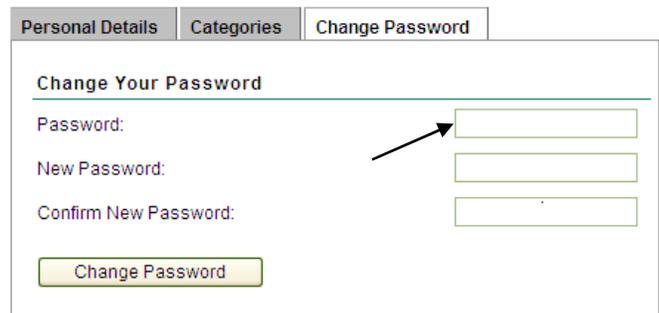
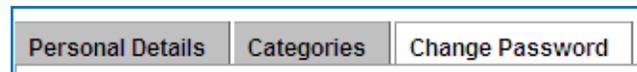


Task A-4: Updating the Password

What You Do

- Click on the **Change Password** tab to change the OBL user password.
- Click in the password text box.
- Enter the current password
- Press the **Tab** key to navigate to the next field.
- Enter the new password.
- Press the **Tab** key to navigate to the next field.
- Re-Enter the new password.
- After the new password information has been entered, click on the **Change Password** command button to save the password change.

Comments/Prompts



What You Do

9. After a moment the page will refresh and the message 'Your password has been changed!' will be displayed.
10. Click on the **Continue** command button to close the **My Profile** page.

Comments/Prompts

Continue