

Using the Keyword Wizard

Creating Keyword Profiles in PTAssist® has never been easier!

Getting Started

Now you have two great options for entering or editing your clients' keyword profiles; the familiar "expert" mode, and the new "wizard" mode. To utilize the wizard, simply click "Wizard" instead of "View".

Select a Keyword Entry									
Records 1 thru 1 out of 1									
Keyword Date	CBD	DLA	EDI	Intl	Local	Non-Fed	Attributes	Includes	New Record
2003-10-22	Y	Y	Y	Y	Y	Y	FSC=70, D, 5965;PRD=NM, OK, TX;SVC=NM, OK, TX;AWD=70, D;	<MONITOR, STAND>, IBM, COMPAQ, HP, <HEWLETT, [+1], PACKARD>, <SUN, [+1], MICRO>	View Wizard Delete

Note: Clicking on "New Record" will open the wizard. If you wish to use "expert" mode to enter your keywords, click "Save" to close the wizard. Then, click "View".

Step 1 – Data Sets

Simply "check" the data sets that you wish to be searched and "uncheck" the ones that you do not wish to be searched.

Step 1: Select the bid source(s) to search.
Check at least one box.

Check all bid sources that apply

<input checked="" type="checkbox"/> FBO/Web Federal Bids	<input checked="" type="checkbox"/> DLA Bids	<input checked="" type="checkbox"/> EDI Bids
<input checked="" type="checkbox"/> International Bids	<input checked="" type="checkbox"/> Local Bids	<input checked="" type="checkbox"/> Non-Federal Bids

Step 2 – Product and Service Codes

You may check "Search ALL PSC Codes" to conduct a global search or you may click on "Edit" to select the product and service codes that you wish to be searched. The codes may be selected from the list on the left and moved to the target list on the right. To select and move multiple codes at once, hold down the control key while selecting the codes.

Step 2: Select the Product and Service code(s) that you wish to search.
Select at least one PSC or check the box.

Search ALL PSC Codes: -OR- Select individual PSC Codes:

Select PSC codes for Bid selections

<ul style="list-style-type: none"> 10 - Weapons 11 - Nuclear Ordnance 12 - Fire Control Equipment 13 - Ammunition & Explosives 14 - Guided Missiles 15 - Aircraft/frame Structural Component 16 - Aircraft Components & Acc 17 - Aircraft Ground Equipment 18 - Space Vehicles 19 - Ships, Boats, Pontoons 20 - Ship & Marine Equipment 22 - Railway Equipment 23 - Motor Vehicles, Trailers 	<input type="button" value="<<"/> <input type="button" value=">>"/>	<ul style="list-style-type: none"> 70 - General Purpose IT Equip & Comp D - IT Services, Including Telecommunic 5965
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To enter a 4-digit product code, enter the value in the field and click the "Add 4 Digit PSC Product Code" button. This will add the 4-digit code to the target list.

If you are not satisfied with a selection in the target list, simply move it back to the left.

When you are satisfied with the target list, click "Save". This will return you to the main wizard screen.

Step 3 – Geographical Restrictions

You may check “Include All States for Products” and/or “Include All States for Services”. Or, you may click on “Edit” to select individual state codes that will restrict product and/or service bids. The codes may be selected from the list on the left and moved to the target list on the right. To select and move multiple codes at once, hold down the control key while selecting the codes.

Step 3: Select the state(s) from which you want to see bids.
 Select at least one State Restriction or check the boxes.

If you are not satisfied with a selection in the target list, simply move it back to the left.

When you are satisfied with the target list, click “Save”. This will return you to the main wizard screen.

Step 4 - Product and Service Codes for Awards (Optional)

The logic is the same as Step 2 above, with the exception of 4-digit codes. Awards may only be searched by the 2-digit product code or the single letter service code.

Step 5 – Includes

This field may be left blank to conduct an open search, or you may click “Edit” to select individual keywords or groups of keywords to be matched upon. Up to five words may be entered at one time and may be searched individually, as a group, or in proximity to each other.

Step 5: Enter Keywords to be INCLUDED in the bids.
 (Leave blank to conduct an open search)

When you are satisfied with your search words, click on “Accept the Words Above”.

To edit existing search words, click on your selection in the target list and then click on “Edit Highlighted Words”.

When you are satisfied with the target list, click “Save”. This will return you to the main wizard screen.

Step 6 – Excludes (Optional)

You can name words, expressions or numeric strings as “Exclusions” which means that if their presence is found in a bid, the program is expected to omit that bid.

In addition to single words to be excluded, we have predefined tables containing multiples of words to be excluded by your making only a single entry. For instance, to exclude bids where no drawings were available, you would have to make at least 35 entries to exclude all the words and expressions that contracting officers have used from time to time, to describe no drawings. Instead, we have built tables that are appropriate for subjects that our clients have identified such as Drawings Not Available, Sole Source, and T-Bids. Global Exclusions need an exclamation point “!” before them to indicate that the word is referring to a predefined table, i.e. !DNA, !SS, !T-BIDS.

Note: The logic for data entry is the same as Step 5 above.

Step 7 – Disregards (Optional)

You can cause the search routine to disregard a word that is similar to, or that contains a derivative of your target word. This is a very useful feature to help account for the unusual appearance, in English, of similar words with different meanings.

If you want to see bids for the word “ENGINEER”, you will find that word in “CORPS OF ENGINEERS”, which may have nothing to do with engineer services. To eliminate this problem, you can enter Expert Proximity criteria with the three words “CORPS, OF, and ENGINEERS” as an expression to be disregarded. This tells the search program to disregard “CORPS OF ENGINEERS”, but to keep on searching for “ENGINEER”. Entering any criteria as a disregard that does not refer to a specific word that appears in the “Include” section will have NO affect on the search.

Note: The logic for data entry is the same as Step 5 above.

Wrapping Up

After you have successfully entered values in all the desired steps, click “Save” at the bottom. This will return you to the “Select a Keyword Entry” screen. You will notice that the wizard has taken care of all formatting and syntax. Note: The wizard may also be used to “edit” any existing records.

Save

Select a Keyword Entry									
Records 1 thru 1 out of 1									
Keyword Date	CBD	DLA	EDI	Intrnl	Local	Non-Fed	Attributes	Includes	New Record
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