Profile Search Criteria Change Procedure & Tips

When making a change to the Profile Search Criteria in a Neoserra client record, copy and paste your change into the Notes field of a Counseling Session. This will document the steps taken to tweak the profile and may prevent duplication of efforts. If you are not actively working with a client, create an administrative Counseling Session and paste your changes into the Notes field.

Please enter changes into Neoserra within three working days. When OutreachSystems makes your requested change a confirming email is sent to you or in some cases the administrator. If you make a change and do not get a confirmation email within 3 days, please notify the administrator.

Refer to OutreachSystems' documentation for a detailed explanation of profile search criteria. To access, go to www.ctptap.org/or.htm and under OutreachSystems select Bid Match Guide.

Bid Match E-mail Format:

The only bid match delivery method available is e-mail. There are three formats available. Web Mail is the current default. If you think you need to use the HTML or Plain Text options, please discuss with the Director.

- **Web Mail** directs your client's bid match output to a private web page on OutreachSystems' mybidmatch.com system. Instead of receiving actual bid matches in the e-mail, the client receives an e-mail notification that instructs them to visit a URL where their bid matches are stored for 30 days.

- HTML - the client will see complete bid match articles, formatted in HTML in the e-mail. W&G Machine is the only client that has requested this option as of 12/11/15.

- Plain Text - this format has the same content as the HTML format, but with all HTML formatting removed.

Guidelines on developing keywords for profiles:

Keywords should be crafted from a government buyer's perspective; in other words, think about what the government might call what it is the company does or sells. Don't worry about plurals or obvious word variations, OutreachSystems will include if necessary. Put in all possible descriptive words and phrases - be specific.

For instance:

Select insulation*
select insulation<1u>(blanket? or barrier?)
select insulation<1u>block?
select insulation<1u>sleeving
select insulation<2u>acoustic*
select insulation<2u>felt
select insulation<2u>high<2u>temperat*

If searching for just "insulation*", then every time that word appears anywhere in a bid, either as "insulation" or with additional characters tacked onto the end (although I don't think there are any words that would fit that bill), a match will be made.

If it turns out that "insulation" on its own is too broad, you can remove it as a keyword, but still have the other more specific statements in place.

Question: Just wondering about the words lifecycle and life cycle and how the matches would happen based on whether the word was together or broken up.

select application<2u>life<2u>cycle<2u>(manag* or mgmt)

Do you need the statement below if you have the one above?

select application?<2u>lifecycle<2u>(manag* or mgmt)

Answer: Yes, you would need both statements if the words are sometimes together and sometimes separated.

Don't use verbs - if necessary - don't use "ing" or "ment" on the end.

Do supply a general overview of products/services. Do they just sell or install also? What types of materials, etc. OutreachSystems will work from the keywords and any overview supplied.

Supply acronyms, part #s, product or brand names and manufacturer's names if appropriate.

Proxity searches can lead to excellent keywords.

Question: We are searching for the **single** words "litigation", "lawyer?" and "attorney?" in separate select statements - why would we need to search for specific types of lawyers, attorneys etc? Won't we get all bids that have those single words in them regardless of what type of lawyer?

Answer: You are right, if you have the terms "litigation" and "attorney" and "lawyer" all by themselves they will catch any bids with these terms and you don't really need the compound statements. However, you also have to be careful because once you delete one of the single keywords down the road because of too many mis-matches that you have to remember to add that term back to the compound statements. Since the key-phrases previously had these terms we just wanted to make sure that you indeed wanted to remove them.

In terms of the proximities, if you send us a profile with proximities and logic already in it, then it is our policy not to change the logic that you have applied. We may let you know we would change a proximity but if you added the desired logic then we assume indeed that that is what you want. If you simply send us the keywords without any logic then we will do our best to add the appropriate logic, wildcards and proximity as we feel is appropriate. However, adding logic is an art rather than a science. We tend to have a fairly good sense which keywords need to be closer together and which keywords can have a larger proximity but you never know exactly how a buyer will construct the language in a bid. If you enter in the logic, then we assume that you are working with your experience and expertise and want to focus on specific bids that you have seen in the past.

Question: We asked to "ignore testimonials" in a profile – how do your folks decide to place a "?" or not at the end instead of the s to get the singular word testimonial? Would you only do that on select statements? Is this just a word that you wouldn't normally do that to?

Answer: We usually don't wildcard ignore statements because they are usually exact phrases that are being ignored. In other words, an ignore statement is generally speaking only added to a profile once you are aware

that a particular keyword matches on a phrase that is not desired. In other words, if you have the following profile: select apple?

And you see that there are a lot of bids out there for fuji apples, but the client doesn't sell fuji apples, then we would ignore as follows: ignore fuji<>apple?

We would not add any proximity to the phrase because then we might exclude granny smith apples from Fuji.

Along those same lines, the following has absolutely no effect on the profile: ignore granny<>smith

Ignoring on words that do not exist in a profile does nothing in the grand scheme of things. The best way to think of ignore statements is to think of them as "masks". The words in the ignore statement are essentially removed (or masked out) from a bid article before the matching takes place. If the keywords still match on a bid with the ignored statements removed from the bid then the client will receive the match. But masking out words that never would have caused a match to occur in the first place doesn't really benefit (or harm for that matter) the profile.

We use ignore statements carefully because they do mask out certain implementations of a keyword which is why we generally speaking do not add proximity statements to them and we are also careful with wildcards. I just looked for the profile in your account that has an ignore statement for "testimonials" and I see that it is being used in a profile that has "test*" as a keyword but really in this case it is difficult to see what you are trying to ignore which is why we try and be careful with the wildcarding.

 Again, looking at this profile, I don't see that the ignore statement will really have any affect on the matching of the keywords. I condensed the profile to only those lines that would even be affected by the ignore statement:

SEARCH CRITERIA FOR 2829 PROFILE 003416

ignore testimonials
select (inspect* or test*)<5u>(exam* or audit*)<5u> (witness* or material? or
        mechanical* or electronic* or assembl* or subsystem?)
select product?<2u>test*<2u>witness*

The two iterations of the keyword "test*" are the only two places where the ignore statement would have any benefit at all, and I actually don't see that the word "testimonials" is ever going to really cause bad matches in this case. We don't add ignore statements by default. Generally speaking we only add ignore statements upon our users' requests because they have seen a word being mis-used in a variety of bids. Adding ignore statements is a never ending battle because there will always be some instance when a keyword is used in an unexpected way.

Which brings me to your question from yesterday when you asked about the "exhibit" profile. It is our philosophy to always use as many descriptive keywords as possible rather than using broad terms and ignoring the things we don't like. Why? Because clients know what they sell and they don't necessarily know all the different ways keywords can be used in bid notifications. If you describe what it is that they do then they get the type of matches that they are interested in rather than throwing the net out there with broad keywords and seeing what you catch. For one thing, the "net" approach is discouraging for a lot of clients because they get so many unrelated bids they stop looking at the bid matches plus it is a never ending process for the counselor of adding ignores to a profile which can take a lot of time and still never be 100% effective.

Getting the client those bids that they are actually able to compete on right from the start is definitely the best approach. That means putting as many descriptive keywords in the profile as possible with the right proximity. Now it is all an art rather than a science and sometimes you don't know how a buyer will phrase a bid, but as a general rule of thumb, single keywords are less effective than key-phrases.

Question: Does using words that end in "ing" and "ment" without using their non-ing or non-ment counterparts cause missed bids? Like consulting, fencing, planning, caulking, staffing, development, improvement, etc. They are verbs (which we are not fond of) being used as nouns. Some ing words like rigging and drilling are fine but many are not. Is that something your folks try to accommodate?

Answer: We will wildcard most of the words listed there. There are some "-ing" words that we would not wildcard but rather spell out the acceptable options.

For example, "designing" would not be wild carded to design* because the word "designed" is very common in the bid notifications that we see and it is often used in an undesired manner. So we would convert "designing" to "(design? or designing or designer?)". Similarly, the word "management" wouldn't just be converted to manag* but we would also add "mgmt" as a second spelling option.

In terms of raising awareness, that is up to you. We will add the wildcarding when we see these types of keywords in the profile so the counselor doesn't have to worry about adding it, but I guess it is good for them to be aware that we will change these keywords to match all possible iterations of the word.

Question: Is it best to leave perform in the select statements below? I worry we could miss bids on this type of thing if the bid is worded without the word perform. I guess I don't like using verbs. Your thoughts on verbs?

select perform<2u>buy<2u>america<2u>audit*
select perform<2u>product?<2u>audit*

Answer:

We don't delete keywords that are provided to us. We will try and refine them as best we can, but when we receive a profile with:

select apple
select granny smith apples

We will add both to the search profile. You are right that technically the second key phrase (granny smith apples) is redundant, on the other hand it is the better of the two keywords. In the case of the above example, we might put the word "apple" in the title and/or we may have it have its own FSG restriction. If we had received the above request we would commonly set up the profile as follows:

 restrict cat:89
select title:apple?
select granny<>smith<2u>apple?

Both lines are definitely valid and worth keeping because the single keyword "apple" that is limited to the title picks up all bids where the pure focus of the bid notification is "apples". The second key-phrase is more specific but it is allowed to search across the entire body of the bid notifications.

In the above example, I feel that both lines are valid to keep in a profile and I would not necessarily remove either. Now this may not necessarily be the case for all keywords. For example, we often see something like this:

select research
select medical research

In this case, if we were to convert the profile as follows:

restrict cat:a,b,r,q
select title:research
select medical<1u>research

The client would get a lot of unrelated matches. The keyword research in this case is extremely broad and FSG categories A, B, R and Q would include a lot of unrelated research bids that the client isn't really interested in.

Still we would generally not delete the keyword "research" by itself because it was provided to us by the counselor. We may comment on it in our email back to the counselor and wait for the counselor to provide us more feedback. Since we don't have the interaction with the client, we don't know really what the client does or wants and the counselor will need to guide us in terms of how the profile should be modified.

Now sometimes we get a profile that looks like this:

select research
select development
select medical
select biological
select hospital

Rather than setting up these keywords as single keywords restricted to the title we may make an initial effort at combining some of the keywords. We have to be super careful and we can't always combine keywords but in this case, it is clear that the client doesn't want to find all bids related to hospitals such as hospital equipment or hospital staffing augmentation or hospital billing services, etc. The client probably wants research related bids so we might set up the profile as follows:

restrict cat:a,b,r,q
select (medic* or biolog* or hospital?)<2u>research
select research<>development and cat:q

Again, this is a judgement call on our end and sometimes the keywords are so broad and so unrelated to each other that we cannot combine them. The following profile is one we received yesterday (not from your account) and as you can see, it is near impossible to determine what the client really does and we couldn't really combine any of the keywords:

 select modular framing
select aluminum framing
select banner
select truck

select sensors
select machine safety
select connectivity
select interface
select linear

Furthermore, we couldn't really make any FSG suggestions either which would have corralled the search a bit.

Question: Profiles **(where we restrict to categories)** include select statements like gun clean kit, gun clean suppl, gun clean rod, gun clean xxx– in this instance we would have missed gun clean set (state bid) – would **in this case** it be best to just look for "gun clean" without all the bells and whistles? I wrestle with using 3 words to describe something when I think 2 words will do well to zero in on the bids. One word – like the exhibit example I can understand but when it gets to 2 vs 3 word phrases at least in this case I have trouble with it.

Answer: Regarding your question on the use of three word phrases such as gun cleaning kit. If all the client sells is a gun cleaning kit, then there is no harm in using all three words. In fact, it will give him the appropriate matches that he is looking for. The client will know best what his product is called. I just did a quick search for gun?<3u>clean* and here are the results:

1. 10--CLEANING KIT,GUN.
2. 10--CLEANING KIT, GUN.
3. 10--CLEANING KIT,GUN
4. 10--CLEANING KIT, GUN.
5. 10--CLEANING KIT,GUN.
6. J -- Preventive/Remedial Maintenance of Paint Gun Cleaners
7. 10 -- Gun Cleaning Kit
8. 10--CLEANING KIT,GUN
9. 10--CLEANINGKIT,GUN
10. 10--CLEANINGKIT,GUN
11. 10--CLEANING KIT,GUN
12. 10--CLEANING KIT,GUN
13. 10 -- Cleaning Kit, Gun
14. 10--CLEANING KIT,GUN
15. 10--CLEANING KIT,GUN
16. J -- Preventive/Remedial Maintenance of Paint Gun Cleaners
17. 10--CLEANING KIT,GUN
18. 10--CLEANING KIT,GUN
19. 10--CLEANINGKIT,GUN
20. 10--CLEANING KIT,GUN.
21. 99 -- CLEANING KIT, GUN PRESSURE WASHER
22. J -- Preventive/Remedial Maintenance of Paint Gun Cleaners
23. 10--CLEANING KIT,GUN
24. X -- Rental of parts cleaning, aqueous brake cleaning and spray gun stations removal of used oil filters
25. 80 - Bid # 404217 Description Paint Spray Gun Cleaning Equipment and Associated Services Closing Date 1/29/2010 2:00:00 PM .

You will see that the better matches (presumably) for this client are the ones where all three words would have been used. The ones I highlighted in red and probably not what he is looking for and this a two-word key-phrase would have given him a number of mis-matches.

There are no written guidelines and profiling is an art rather than a science. Just think about Google searches. There is no absolute way that you search within the Google interface. Depending upon what you are looking for you use either more or less keywords to find the desired results.   We process over 3500 bids per day from hundreds if not thousands of different buyers who each have their own terminology and ways that they like to publish a bid. We try our best to get as pin-pointed as possible with the search results but we can never anticipate all the different ways a buyer may describe what it is that they are looking for. There has to be a careful balance between giving the client too much and too little. The too much approach definitely doesn't work in our opinion but that means we have to be careful not to miss a bid by giving the client too little. This is where it becomes rather subjective.

One golden rule that we have, however, is that codes are bad! We do not like FSC, SIC, NAICS or NIGP codes. Client will invariably miss bids if profiles consist only of codes and worse yet, clients will get a ton of unrelated bids if codes are used in a profile because codes describe a grouping a products or services, they are not precise (unless you use NSN codes).

How to find additional keywords:

To find additional keywords for a client's profile use their website click on View then Source, scan though the words and select words you think are appropriate. You may also do this for their competitor to see if they have any additional words. OutreachSystems also has sample profiles on their website at: http://www.outreachsystems.com/cats/bidmatch/profiles/

General Guidelines regarding too many bids from Colette (January 2013):

Looking at your master mybidmatch.com listing I see that you have several clients that are getting more than 10 bids per day on average who have not read their bids. Some of these get quite a bit more than 10 bids per day and we usually find that these clients get so many matches that they just can't keep up. I would take a look at these profiles and see if there are any specific keywords that can or should be modified.

And even clients with a "current" date seem to be reading only sporadically. They read their bid match a few days ago but they only looked at some of the bids. It may be worth working together with these clients to try and find the best possible bids for them so that they don't miss something absolutely perfect for them on the days that they don't look at.

I know it is hard and it certainly isn't an exact science but our goal is always to get the best bids for the clients not the most bids. If they miss some bids that are only peripherally of interest to them, but we always give them bids that are directly within their realm of expertise, then I think we provide a better service to the client.

One way to limit some of the bids that these clients get is to add a geographic restriction. While a client may want to see what is going on in California if it causes them to miss a bid right in their neighborhood then having all this extra knowledge isn't worth the price.

Bid match emails are sent out from the following email address:

Connecticut PTAP (bidmatch-2829@mybidmatch.com)

Product Codes:

If changing Product Codes (FSC, PSC, SIC and NAICS) be sure to change them both in the Search Criteria Profile and in the Product section of the Neoserra client record if they appear in both sections.

1) The NAICS codes do not match in the USABid data. Only Federal Databases use NAICS codes.

Large Profiles:

OutreachSystems maximum number of NSN, CAGE Codes or Part Numbers in a profile is 5,000.

SBIR:

SBIR data is received by OutreachSystems monthly so you will see a great deal of matches once a month.

Restrict Statements:

Restrict:

When there are no restrictions on sections, states or categories – the key terms (select statements) are searching everything, all sections, all states, all foreign data and all categories.

Webster's dictionary defines the verb "restrict" as: *to confine or keep within limits*. In profiling, the term restrict has the same definition. If you restrict a profile to the FedBizOpps (FBO) database, you are keeping the profile within the limits of that database. Let's use the following profile excerpt as an example:

> *restrict sec:fedbiz*
> *select stethoscope?*
> *select swab?*

The keywords (stethoscope and swab) that follow the *restrict sec:* statement will ONLY create matches when the bid opportunities are published in the FBO database. When you submit a *restrict* statement request (whether it be a state, FSG (category), or database (section) restriction), I interpret the request to mean that other elements of your profile have to fall within the limits of the *restrict* statement.

If your intention is the opposite (i.e. you don't want to see bid opportunities from a particular state, FSG category, or database), then, instead of a *restrict* statement, you must use a "*restrict not*" or *exclude* statement, as shown in the following example:

> *restrict not cat:58*
> *select stethoscope?*
> *select swab?*

The keywords (stethoscope and swab) that follow the "*restrict not cat:*" statement will NOT create matches when they are found in bid opportunities published under FSG 58. Instead, they will create matches when found in any category other than FSG 58.

When setting up or editing a profile, restrictions are indicated from the Profile Set up window, NOT the Add Search Terms area. As explained in the Bid Match Guide, the Select Sections and Groups screen determines the databases and FSGs that you are restricting your search terms to, not the databases and FSGs that you are searching for. If you wish the profile to match against all databases or FSGs, you do not need to select any groups or sections from this screen—the default is all databases and FSGs.

All restriction must come before the select statements (keywords) and limit all the keyword. You can use an unrestrict statement in a profile which starts a new search so anything after the unrestrict is not controlled by what came before it.

The difference between ignore and restrict not:

Restrict not will reject the bid entirely once it matches on the statement that appears after the restrict not statement. Ignore will ignore matching on a statement that appears after it, but will continue on to find matches on other keywords. You may restrict not on about anything but an ignore must include the full match select statement.

Ignore "no" computer – excludes word when the word "no" appears with it.

Restrict Sec:

In search profile terminology, sections are the databases that OutreachSystems searches using the key-terms in a profile. OutreachSystems can search all available databases using the profile terms, or can search a particular subset of databases that you indicate when creating the profile.

If there is a section restriction statement (restrict sec:) at the beginning of your profile, OutreachSystems will only search the databases listed after that statement. If there is a section exclusion statement (restrict not sec:), OutreachSystems will specifically exclude the databases listed after that statement from its profile searches.

There are certain sites that OutreachSystems collect bids from that do require a subscription service. They do not pay the subscription on behalf of the PTAP clients. It is really up to the client to decide whether a subscription fee is worth it for them. If the annual subscription fee for a site is $50.00 and the bid is for a several thousand dollars service/commodity, then it might be well worth the subscription price. There are some things OutreachSystems can do to globally reduce these for all your clients but we are not sure we want to make the global decision for them?

When you see a *restrict sec:* statement with "ct" as one of its options for example *restrict sec:(fedbiz,bt,fto,dla,small,edi,bid,ct)* it is from long ago and was used when CT PTAP submitted its own proprietary state bids. If "bid" is not one of the options "ct" will allow the profile to match the USABid database that OutreachSystems compiles for CT.

The statement *restrict sec:ct,ny* restricts the profile to only search USABid data for CT and NY.

No need to change it to:
>   *restrict sec:bid*
>   *restrict state!ct or state!ny*

>   *Restrict sec:ct,ny* does the same thing with only one statement.

If you wish for a client to receive notices of awards for their keywords you can search the "fedbiz" database.

The section restriction statement would show restrict sec: fedbiz and any other databases you want to search. If a client does not wish to see awards for his keywords you can search the "procure" database. The section restriction statement would show restrict sec: procure and any other databases you want to search. Simply put "fedbiz" includes awards "procure" does not. You do not need to put the awards database in separately if you have "fedbiz" in your sec search statement.

Situation: Our new counselor is trying to figure out when a profile shows Small as its section search – is that the Other Federal Small Purchases or DLA Small Purchases database? See the list on the New Profile page below. The Bid Match Guide states it is The Other Federal Purchases subsection of the DLA Purchases database. HELP – I'm confused!

Step 2. Choose Your Data Sources

Please check all the databases that you want to search. For a description of the various databases you have to choose from please refer to http://www.outreachsystems.com/cats/bidmatch.

All

Blue Tops Sub-Contracts	Foreign Trade Opportunities
FedBizOpps	Other Federal Small Purchases
DLA Small Purchases	USABID State and Local

Karen's answer: If a client's section restriction line contains the section heading "SMALL" then it is searching the "Other Federal Small Purchases". But section "SMALL" is also included under the section heading "DLA"; it is subsection of the DLA database kind of like section FEDBIZ has subsections.

This means, if a client's section restriction contains section heading "DLA" they are searching against the DLA depot data and also section SMALL. So if you are searching against section "DLA" you do not also have to include section "SMALL" but if a client does not want to search against the Defense Logistics Depots but does want to search against the agencies included in section "SMALL" then you need to choose "Other Federal Small Purchases" (SMALL).

One other thing; say a client has no section restrictions in their search profile but is excluding on section "DLA", that also means they are excluding on section "SMALL". In this case, if the client still wants to search against section "SMALL" you need to let us know because we will have to change the exclusion so that it does not also exclude on section "SMALL". The exclusion will look like: restrict not (sec:dla and not sec:small).

Restrict Category: (January 2013)

Changed August 2014 - Category 99: *Restrict Category:99* is only used for the database sections that do not use categories such as the FedBizOpps (FBO) Special Notices, Foreign Notices, Surplus and DoD Blue Tops. You need to include category 99 when you have category restrictions and you want to match the keywords against those databases, which are not split out by categories. If you have category restrictions and no section restrictions, then you would also need to include category 99 in the restrict statement.

OutreachSystems assigns the Product Service Codes and Federal Supply Codes to the USABid bids. These are the same codes used for the FBO and Defense Logistics Agency (DLA) bids. These codes can be found at:

http://www.outreachsystems.com/resources/tables/pscs/.

The only databases which do not use the codes, and so you need category 99 if there are any category restrictions in the profile, are the BlueTOPS (DoD awards over $3 million) and the FBO subsections Special Notices, Foreign Notices, and Surplus.

It does specifically spell out BlueTOPs awards in the notices: The agency of a BlueTOPS will be: Pentagon News Briefs, The Department of Defense. An example of the OutreachSystems ID is: OUTREACHSYSTEMS ID No.: 060201-0001BLUETOPS BT Just about every title for the BlueTOPS starts with: BLUETOP AWARD ANNOUNCEMENT

If there are no category restrictions; a client will search against those sections not split out by FSG. Category 99 is one of those things that is easily forgotten. You must add it to all profiles with category restrictions if you want to search for BlueTOP awards. This way you can make sure that all active clients searching BT or the whole FBO database will actually search against those sections not split out by FSG.

January 2013 Comments by Colette regarding searching Blue Tops:

There aren't really that many Blue Tops bids/awards. We only receive about 20 bids per day and most of them don't have a lot of description to match on unfortunately. Sadly I don't think even with the addition of category 99 will your clients see a lot of Blue Tops bids/awards. August 2014 - One thing to keep in mind that while Blue Tops are cool there are only about 6-8 bids per day that we receive, so the volume is very low. Furthermore the description in these articles is very non-descript. Very few clients will ever match on these bids. If a client truly is interested in seeing these bids then I would recommend that they search for ALL of the blue tops. This will give the client a chance to actually see what is being awarded and they will know best what bids may have subcontracting opportunities for them. Janitorial companies, landscaping companies, construction companies, machine shops, etc will not really benefit from these Blue Tops notices.

 Here is a typical bid:

Pentagon News Briefs, The Department of Defense
SOFTSHARE ID No.: 130103-0002BLUETOPS BT
BLUETOP AWARD ANNOUNCEMENT: Lockheed Martin, Grand Prairie, Texas, was awarded a $755,134,781 firm-fixed-price contract. The award will provide for the procurement of PATRIOT Advanced Capability-3, which includes support for Foreign Military Sales, and related services. Work will be performed in Grand Prairie; Lufkin, Texas; Camden, Ark.; Chelmsford, Mass.; and Ocala, Fla.; with an estimated completion date of July 31, 2015. One bid was solicited, with one bid received. The U.S. Army Contracting Command, Redstone Arsenal, Ala., is the contracting activity (W31P4Q-13-C-0068).

As you can see there is not much to match on. Besides the lack of detail there simply aren't that many Blue Tops awards announced each day. On average we get 20 bids per day which is less that .05% of our daily bids that we process.

General Category:

Situation: Counselor has always had a client under category 93 as they are plastic injection molders. Client asked if there was a list for all plastic parts that the government buys. Counselor searched on FBO, using "plastic" as a keyword. FBO returned over 200 pages. Counselor clicked on some to see where and how plastic was mentioned and found that solicitations were coming out in all categories with plastic added to the name. Example: cat 53, bolt, plastic. Since cat 93 was the only one listed for this client they missed out on a lot of bids.

Can we restrict this client to all supply categories and put plastic by all their keywords? If so, counselor will go thru and take out *and cat 93* by some of the keywords and add plastic to them all.

Karen says: The agencies do not always put items where you think they will be put. They will most likely put a specific item such as a fastener under the category they feel it should appear under even if it is to be made out of a nonmetallic material. Yes, we can change it so that the profile searches all supply categories and so that all the matches also contain the term "plastic" or "plastics"

> r*estrict cat:93,0,34* was changed to: *Restrict cat:supplies,0*
> r*estrict not cat:b-z* was deleted.
> a*nd cat:93* was deleted from the keywords.
> r*estrict plastic?* was added.

You may find that the keywords match under some categories that you do not want such as maybe category 83. If so email profiles@outreachsystems.com the categories to exclude (*restrict not*) on as they come up.

Situation: Counselor added: *select cat:70,d and !C<2U>(programming or programmer? or coding or application?)*. Counselor asked should *select cat:70, d and !C* be deleted?

Karen says: The *select cat:70, d and !C* will match on the terms in the other statement so there is no reason to have *select cat:70,d and !C<2U>(programming or programmer? or coding or application?)*. You could leave in *select cat:70, d and !C* and change the other statement to: *select !C<2u>(programming or programmer? or coding or application?)*. If *select cat:70, d and !C* turns out to be too generic you can delete it and just leave in the other statement.

Situation: When you see a *select ring? and not 53, 56* statement in a profile and the profile is restricted to categories other than 53 and 56, do not remove the statement because if the profile were opened up to other categories they will not get as many mismatches. Karen does this when she knows a keyword can mean several different things and she wants to help narrow the term down. Counselor was originally trying to change *select ring? and not cat:53,56* to just *select ring*. Karen pointed out in cat 53 and 56 the keyword ring will match on spacer, clamping, O, retaining, manhole ring etc. which may not be appropriate.

Restrict Quantity:

To restrict bid matches to show only the quantity desired when it is more than a particular number. This restriction will only work against the DLA data. This only works with the daily bid match search, so if you test a profile using iSearch the quantity restriction will be skipped like the source files.

Colette's remarks: Doing a quantity restriction is generally speaking not recommended. If we add a restriction to the profile to only match on those bids of 10 or more units, then any bids that don't reference total units will not be matched. In other words, our search engine can only search based upon the data in a bid. If we say that

the bids must reflect a quantity greater than 10 then the absence of a quantity will eliminate the bid from consideration. Furthermore, doing quantity restrictions is an imprecise science because this data is not indexed and thus not searchable beyond doing a raw data search. I fear the client may end up missing bids.

Restrict quan > 500 will give the client those DLA notices where the quantity is over 500 (or any number that you want). So to restrict to quantities over 2000 we would add: *restrict quan > 2000*.

We can add a quantity restriction if you want, but please keep in mind that this only really works in the DLA database where they will note the quantity being purchased about half the time. If we put a restriction in the profile and the bid abstract does not have a quantity referenced then we would never match on it, meaning you could miss a fair number of bids. I would recommend against it generally speaking.

Restrict to Commercial Items Only:

There is no way to determine if a solicitation is commercial or not. If there is specific wording in a solicitation that makes it commercial or non commercial, you could restrict or exclude on that specific wording.

So if the client only wants solicitations, which say "commercial items" or "commercial procedures", then we could restrict all keywords to only match if those statements are in the solicitation. Likewise, if they want to exclude on all solicitations that say non commercial we can do that.

Restricting to a specific Geographical Region:

When sending in your profile modification message you can ask to limit the profile to the east coast or east of the Mississippi. When creating a new profile the regions are listed under the state restriction drop-down.

East coast restriction contains the following states:

  ME, NH, MA, RI, CT, NY, NJ, DE, DC, VA, NC, SC, GA, FL

East of the Mississippi Restriction contains the following states:

AL, CT, DC, DE, FL, GA, IL, IN, KY, MA, MD, ME, MI, MS, NC, NH, NJ, NY, OH, PA, RI, SC, TN, VA, VT, WI, WV, MN

Agency States vs. Performance States:

When you search databases for bids, are there separate fields that you search on for these values? The counselors are used to seeing bid matches that are printed and see the states mentioned in them with no particular description of Agency or Performance. Could you explain how the bids are searched for these state fields?

If there are no state restrictions in the profile it will search globally (all states).

If the profile contains the restrict statement:

    restrict state!ct

The keywords will only match if CT or Connecticut are mentioned in the main body of the solicitation (that is everything from the title down.)

If the profile contains the restrict statement:

> *restrict age:state!ct*

The keywords will only match if CT or Connecticut is mentioned in the "agency field" which is the line above the title of the solicitation.

If the profile contains the restrict statement:

> *restrict age,text:state!ct*

The keywords will match if CT or Connecticut is mentioned in the agency and/or text fields of the solicitation. I suggest this way when you are only searching in the supply categories, because where something is to be delivered is not always mentioned in the main text of the solicitation.

You can setup a profile so that the services are restricted to particular states and the supplies are not restricted to any states. It is best to just e-mail the profile ID to Karen and explain what you want because what needs to be changed will depend on the profile.

Example of the two state fields in the HTML format:

The area marked in red is the agency field. The area marked in blue is the text field. The text field also includes the title field.

FedBizOpps - Procurements

Attn: Department of Veterans Affairs Austin Automation Center, (316), 1615 Woodward Street, Austin, Texas 78772
R -- CONFERENCE SPACE RENTAL AND SUPPORT SERVICES 777-03-H003 111902 Contracting Officer - **Karen** Lebo, Contracting Officer, (440) 838-6028 The Department of Veteran Affairs, Employee Education System (EES) intends to negotiate with The Sheraton Parsippany Hotel, 199 Smith Road, Parsippany, NJ 07054 on a sole source basis for the acquisition of meeting rooms, audio/visual equipment, refreshments, etc. for the 2003 Nurse Managers Conference to be held on April 24-25, 2003. To limit the travel expenses of the VISN 3 participants, the Parsippany NJ area is preferred as the conference site location. An estimated 130 participants will be attending the 2003 Nurse Managers Conference. EES will require approximately 100 sleeping rooms for the period April 24-25, 2003, at the prevailing Government rate. A general session room accommodating approximately 130 individuals and 2 breakout rooms holding approximately 50 people each will also be required. The general session room must provide space for at least 12 tabletop exhibits. Audio/visual equipment is estimated to include 1 large screen, 4 microphones, 2 smaller screens, Laser Pointer, and 2 LCD Data Projector. Light refreshments for morning and afternoon breaks will be required. The dates of the 2003 Nurse Managers' Conference are restricted to April 24-25, 2003 in order to accommodate the VISN 3 Director's schedule. EES has researched numerous hotels in the Parsippany NJ area based on the requirements specified above. No other source is known to EES that is capable of supplying the required rooms, equipment and space for the given timeframe. Any source submitting written responses to this synopsis shall include sufficient documentation to establish a bonafide capability to fulfill the requirement and must be compliant with the Hotel and Motel Fire Safety Act (provide FEMA number) and the Americans with Disabilities Act. A SOLICITATION IS NOT AVAILABLE. Any written and/or verbal requests for copies of a solicitation relating

to this announcement will not be honored or acknowledged. A determination by EES not to compete this requirement based on any responses received to this notice is solely within the discretion of EES. Any information received will be considered solely for the purpose of determining whether to conduct a competitive procurement. The Government will not pay for any information received. If you have any questions regarding this announcement, please contact Melissa Green 919-680-6841 X247, FAX 919-286-6842, email Melissa.Green@lrn.va.gov. E-mail: **karen**.lebo@lrn.va.gov URL: http://www.eps.gov/spg/VA/VAAAC/VAAAC/777-03-H003/listing.html

OutreachSystems Article Number: 021115/PROCURE/0037

Restricting to the Title of a bid match:

Restricting to the title of a notice is not in the dropdown. You will need to write it out: *title:keyword* or you can abbreviate "title" to "ti:" that will work too.

If you are limiting a search term to a specific category such as: *select cat:63,70 and identification<>card?* then most likely you are okay searching the full notice. If you still want to restrict to the title then you would write: s*elect cat:63,70 and title:identification<>card? o*r just email OutreachSystems asking to limit the keyword "identification card" to match in the title only.

When you see "title" it is restricting the search to the solicitation title. This is a way to narrow down on certain words that may be part of many solicitation but don't specially match the service provide. A really good example is "telephone". If I sell telephones I wouldn't want to use that as a search term because I would get hundreds of mismatches per day. By searching the title, I have a better chance of finding matches for people wanting to buy telephones.

Restrict to FSC (Federal Supply Code):

Situation: If a client wants to only see bid matches for specific FSC codes, such as 1730, 3490, 4010, etc. because he can manufacture parts that begin with those FSC/NSN numbers but the profile is restricting to categories 17, 34, 40, etc. for other FSC codes such as 1740, 3480, etc. that they cannot manufacture.

Delete the category restrictions and add a restriction which limits the search term to only the specific FSC codes.
Example:

Delete: *restrict cat:17,34,40*
Add: *restrict to FSCs 1730, 3490, 4010 etc*.

Note: client only wants to see matches for their keywords when one of the FSCs is also mentioned.

The note is so, if I'm out of the office and am not the person taking care of the message that it is clear to any one else what you want done.

Source NotSole:

The NotSole statement is intended to filter out bid opportunities that request that the bidder be an 'approved source,' since these types of opportunities are generally not well suited for smaller businesses. However, notice

that the statement is flexible enough to *not* filter out the mention of 'approved source' if it is within the context of 'if your company would like to become an approved source'.

> *approved<>source and not company<2>would<2>become<1>approved<>source*

Source NotSame Exclusion:

The NotSame Exclusion filters out bid opportunities that call out a specific product and request that the product be bid without exception. In other words, no product substitution is allowed. There are two statements in the NotSame exclusion that, when found in a bid opportunity, will cause the opportunity to be eliminated from search profile output. This has not been added to our global file so you would have to add it to profiles separately.

> *bid<>without<>exception*
> *unauthorized<>substitution*

Source NotFto Exclusion

The Source NotFTO filters out Foreign Trade Opportunities:

restrict not sec:fto
restrict not sec:foreign
restrict not (united<>states or us or american)<1u>(consulate or embass*)

Source Small

The Source Small limits the client to only matching on those bid opportunities that reference a small business set-aside.

restrict small<>business<2u>(setaside or set<>aside)
restrict ((100<>percent or 100 or 100<>per<>cent or total)<2u> \ (business or small or setaside? or aside? or \
      minority or woman or disadvant* or SDB or indian) or \ 8<>!A or 8a or note!1 or !SDB or small<1>disadvant*)

FSC & NSN:

Can the client manufacture specific parts for the federal government? If yes, have the client provide National Stock Numbers (NSN. The first 4 digits of the supply code are the first 4 digits of an NSN. A client can search or restrict search to FSCs. If a FSC is too generic you can refine the FSC to a specific keyword or words. You may decide to eliminate the category restriction and restrict to FSC as mention under "Restrict to FSC". This would help eliminate inappropriate bid matches that may fall under that category. Example:

> Restrict fsc!5930
> Select switch or switches
>
> Do not add in CAT 59. If CAT 59 was in the profile it may pull in bids for resisters, capacitors, fuses, etc.

If the client cannot manufacture any parts for the federal government, you may decide to eliminate bids with NSNs and bids from the Supply Centers (*restrict not NSN, restrict not sec:dla*).

If a client does not want to see any bids for critical application, add to the profile restrict not critical<>application. See Restrict Not section above.

If a client only wants to see bids from the Supply Centers when drawings are available, restrict not the AMC codes that apply (restrict not AMC<4>4B).

Service FSC (r008) is not used in bids and will only match in EDI. Therefore if client is not searching EDI, service FSC is not required.

If client is not going to register in SAM, recommend eliminating federal searches unless using for subcontracting. Also eliminate all FSC, SIC and NAICS.

NSN Code Unrestrict:

NSNs are usually put under an unrestrict statement. NSNs do not need to be restricted by categories and should not be restricted by the Global file. CAGE codes should also be under an unrestrict since they probably not be restricted by the Global file either.

Restrict Set-Asides

Question: We remember something about restricting to socio-economic categories. Can you tell us if we can or not? This is the profile in question. Does this really work?

restrict cat:s,v,y,z,0 or (8a or 8<>a)
restrict state!ct or state!RI or (8a or 8<>a)

We have an FAQ that addresses your specific question:
 https://support.outreachsystems.com/resources/help/neoserra/faq.jsp?id=n124.

The way you listed the restriction is pretty good. The client would still match bids in the selected categories or they would match on any other bid that has an 8(a) set-aside.

Putting the 8(a) or any set-aside restriction by itself is not recommended unless the client truly only wants bids that are guaranteed to be set-aside. Our search engine only works on exact matches. In other words, if a bid is set-aside but the abstract does not necessarily say so, then the client would miss this bid if we had restricted to set-aside contracts only. Similarly, we seldom see set-aside terminology in State and Local bids so the client would essentially eliminate seeing those opportunities if they added a set-aside restriction. Again, the way you structured your restriction would avoid this pitfall, but do be careful with these types of restrictions.

Restrict Not Statements:

Restrict Not

Question – With the *restrict not* statements – are you searching or ignoring those keywords?

Karen's answer: You are avoiding them. A *restrict not* is an exclusion, so the profile will NOT match on a notice that contains the restrict not statement no matter how many search terms are in the notice. The ignore statement is an exclusion but it will only work if no other keywords match in the bid where the *restrict not* will

get rid of the bid no matter how many key terms are in the bid. The ignore statement must also contain the full select statement. So if you are searching for: *Select apple?*
You can ignore on "*apple computer*"
But if you are searching for: *Select red apple*
And the match is for apple computer with a red case
You must ignore on "*red apple case*"

Here are the exclusions that we can add to get rid of the USABid Long Island NY site:

We can exclude on:

1) the agency name: **restrict not (sec:ny and age:City<1>Long<>Beach)**
2) or we can add: **restrict not age:wwwlongbeachny*** (Note: I deleted the periods between www and long on purpose (the system ignores them so everything runs together.))
3) we can also exclude on the site using: **restrict not wwwgovbidscom<1>scripts<1>limbs***
4) If the client does not want any USABid matches from NY we can add: **r not sec:ny**

Exclude Critical Application:

How to exclude matching on a solicitation that has the phrase "critical application" in it.

> *restrict not critical<>application?*

Exclude Award Notices:

How to exclude award notices. When client does not want to receive any award notices – email OutreachSystems stating the client's request and they will add the following to the client profile.

> *restrict not sec:awards*

Ignore Bids:

How to ignore bids from the Defense Supply Center Richmond:

> *restrict not age:(DSCR or Defense<1>supply<>(Center or Ctr)<10u>Richmond)*

Global Exclusion:

Effective 8/24/04, the Global Exclusion statement is no longer automatically added to Search Profiles. Each counselor must add the NotSole and NotSpecs files as appropriate.

The Global exclusion is a series of *restrict not* statements designed to filter out certain types of bid opportunities—namely opportunities where specifications and drawings are not available (filtered out by NotSpecs exclusion) or where there is a sole source bidder (filtered out by the NotSole exclusion).

The Global file is the same for all client profiles and contains exclusions for common ways that OutreachSystems has found "sole source" and "drawings or specifications not available" to be worded.

The "source ~2829/Global" file is no longer added whenever a new profile is setup. The reason it was automatically added in the past was that the majority of the clients are small businesses and normally do not want to see Sole Source solicitations or solicitations where the drawings or specs are not available.

When you create a new profile and your client does not want to receive sole source solicitations or solicitations where the drawings/specs are not available, you have to indicate to OutreachSystems to add NotSole and NotSpecs to the profiles.

Profiles that are mainly searching on NSN, part numbers, CAGE codes or company names should not have the Global file "source ~2829/Global" in them as it could prevent the client from seeing a sole source award to them.

All other exclusions restrict not statements are only for the particular profile they are in.

The Global file contains the following exclusions (restrict not statements) for Sole Source and Drawings/Specifications not available. Visit the link below for a copy of the Global file.

www.ctptap.org/sourceglobal.htm

Restrict Not Supplies vs. Services:

Counselor would like bid matches only in supply categories, not in service categories. To accomplish this Karen added:

restrict not cat:a-z

Foreign Trade Opportunities:

The statement: *restrict not sec:fto* is eliminating section FTO in its entirety, so the foreign matches are not from the FTO database.

Some foreign notices can appear in the FedBizOpps or maybe one of the other databases and the only way to get rid of those would be to exclude on the country's name. Karen tested the profile and saw an FBO match where the agency was "Overseas Missions" so she changed:

restrict not over<>sea?
restrict not oversea?

to:

restrict not age,text:over<>sea?
restrict not age,text:oversea?

The following file contains exclusions on foreign countries:

source NotForeign

Visit the following link to view Source Not Foreign File.

www.ctptap.org/sourcenotforeign.htm

Source IgCal:

Source IgCal contains ignore statements but for a particular word. When a person wants to search on the word "calendar" the IgCal helps get rid of some of the mismatches that this keyword produces, such as "calendar date" or "calendar avenue" or "during calendar quarter". There are several files that start with *source Ig* or *source Not* such as IgJacket, which ignores on mismatches for the word "jacket".

All the Ig files contain ignore statements, so if you are searching on the company name DEC and the profiles contains the source file Ig Dec you are less likely to match on the abbreviation for December or if you are searching for "sign*" to match on signage and the profile also contains IgSign then you are less likely to match on "signature".

Ignores are different than restrict not statements in that if the word "sign" or "DEC" appears elsewhere in the match or if another keyword also appears in the match the client will still receive that match, so they are unlikely to make a client miss a match.

File	Link
source Ig - Blanket Order	www.ctptap.org/sourceigblnktordr.htm
source IgAdvert	www.ctptap.org/sourceigadvert.htm
source IgAward	www.ctptap.org/sourceigaward.htm
source IgBlock	www.ctptap.org/sourceigblock.htm
source IgC	www.ctptap.org/sourceigc.htm
source IgCal	www.ctptap.org/sourceigcal.htm
source IgDec	www.ctptap.org/sourceigdec.htm
source IgFax	www.ctptap.org/sourceigfax.htm
source IgFloor	www.ctptap.org/sourceigfloor.htm
source IgGrant	www.ctptap.org/sourceiggrant.htm
source IgJacket	ignore sol<>jacket
	ignore cnt<>jacket
source IgLead	www.ctptap.org/sourceiglead.htm
source IgPh	www.ctptap.org/sourceigph.htm
source IgPin	www.ctptap.org/sourceigpin.htm
source IgPrint	www.ctptap.org/sourceigprint.htm
source IgSecurity	www.ctptap.org/sourceigsecurity.htm
source IgSign	www.ctptap.org/sourceigsign.htm
source IgWindows	www.ctptap.org/sourceigwindows.htm

Source NotDod:

The Source NotDod statement excludes (restrict not) on DoD agencies. The client's profile will only match on FedBizOpps Civil agencies, sections USABid, SMALL and FTO if the profile is searching in those sections.

Select Statements:

The Science of Matching Keywords:

At the bottom of every bid opportunity your clients see, matching keywords are listed. In some circumstances, keywords that did not directly cause the match are listed here as well. The presence of these "indirect" keywords sometimes creates confusion for you and your clients. Read on to learn exactly how these "matching" keywords are generated by OutreachSystems.

As shown in the next graphic example, the search statement of select floppy is the cause of the bid match. "Floppy" is highlighted in blue within the text of the bid notice and anyone glancing at this bid opportunity can quickly determine the cause of the match.

But what happens when we qualify our search statement with a second keyword: select floppy<1u>drive?

This statement searches for the keywords "floppy" and "drive" in close proximity. But notice how, in the following graphic example, the keyword "drive" is highlighted three times throughout the bid notice, but only one of these occurrences is within one word or less of "floppy." This is the standard operating procedure for OutreachSystems' search engine: even though it is the combination of "floppy" and "drive" that caused the match, OutreachSystems still highlights every individual occurrence of both keywords. At a glance, it may look like "drive" is responsible for the bid match, but upon closer inspection, you can see that "floppy" is present as well.

Profile Excerpt
select lan<1u>(adapter? or meter?)
select floppy<1u>drive?
select modem or modems

Things get a little trickier when we add another keyword onto our statement: select floppy<1u>(drive? or diskette?).

Take a look at the third graphic example. "Diskette" is highlighted twice, but neither occurrence appears within one word or less of "floppy." The keywords "floppy" and "drive" in combination are still the cause of the match; however, because the keyword "diskette" is part of the search statement, our search engine also highlights its occurrences—even though "diskette" played no role in causing the match. In addition to highlighting keyword occurrences individually, OutreachSystems also lists matching keywords individually (e.g. Matching Key Words: floppy; drive?; diskette?;). Keywords are listed individually even when, like the previous two examples, it is a combination of keywords that caused the match.

Profile Excerpt
select lan<1u>(adapter? or meter?)
select floppy<1u>(drive? or diskette?)
select modem or modems

While it's helpful to quickly see all relevant keywords in an article, it can be misleading to your clients who may be trying to figure out the exact cause of a match. For this reason, we recommend that you always provide your clients with copies of their profiles. Profiles are easily forwarded from client records.

Proximity:

 The <> connects two terms but does not allow any terms in between the two terms it is connecting. Example: *select computer system* will only match on "computer system" and not on "computer simulation system".

The <1> allows one word between the two terms it is connecting but the terms must be in the order written: Example: *select computer<1>system* will match on "computer system" and on "computer simulation system".

When you use an unordered proximity such as <1u> this means that the words can have none or up to one word in between them and the "u" means they can be unordered. Example: *select apple<1u>green* could match on "apple, green" or "green apple" or "green apple and red".

The number in the <> can be as large or small as you want. You can also just use a "u" in the middle. This just means unordered. Example: *select roundbolt* will match on: "round bolt" or "bolt round" but not on "round and hex bolt".

The following words are ignored when proximity searching is being performed.

AND	THE	An	Dated	Dtd	See
The	To	a	about	an	and
are	at	be	but	by	for
in	is	issued	of	on	or
shall	the	this	to	which	will
with	without				

The CAGE!, NAICS! and NSN! are indexes specifically categorizing the code as a CAGE, NAICS or NSN and does not appear in the solicitation. Proximity markers < and > cannot be used in conjunction with these search indexes. For instance   Select CAGE! 1234T<2u>bolt will not work because the CAGE is not part of the solicitation so it will never be within any proximity to keywords.

Question: So under what circumstance would the search term at top work if the phrase in the bid had the C at the beginning?

search A<1u>B<1u>C

Answer: Considering this search term:

search A<1u>B<1u>C

The 1 allows for single words in between the search words…

"A x B y C"

…and the u allows the search words to be ordered either way:

"A x C y B"

So under what circumstance would the search term at top work if the phrase in the bid had the C at the beginning?

"C A B", without any additional words, would work because C is still within 1 word of B. However, if any other words are in play it will not match. In both of the following cases C is now 2 words away from B:

"C x A B"

"C A y B"

So you'd either need <2u> instead of <1u> to allow for one more word in between, or you might use parentheses:

search (A<1u>B)<1u>C

In this case, A and B are viewed together as a single phrase and C has to be within 1 word of that phrase. So now these would match:

"C x (A B)"

"C (A y B)"

NSN Code Unrestrict:

 NSNs are usually put under an unrestrict statement. NSNs do not need to be restricted by categories and should not be restricted by the Global file. CAGE codes should also be under an unrestrict since they probably not be restricted by the Global file either.

Restrict to FSC (Federal Supply Code):

Situation: If a client wants to only see bid matches for specific FSC codes, such as 1730, 3490, 4010, etc. because he can manufacture parts that begin with those FSC/NSN numbers but the profile is restricting to categories 17, 34, 40, etc. for other FSC codes such as 1740, 3480, etc. that they cannot manufacture.

Delete the category restrictions and add a restriction which limits the search term to only the specific FSC codes.
Example:
> Delete: *restrict cat:17,34,40*
> Add: *restrict to FSCs 1730, 3490, 4010 etc*.

Include a note to OutreachSystems indicating the client only wants to see matches for their keywords when one of the FSCs is also mentioned.

FSC & NSN:

Can the client manufacture specific parts for the federal government? If yes, have the client provide National Stock Numbers (NSN. The first 4 digits of the supply code are the first 4 digits of an NSN. A client can search or restrict search to FSCs. If a FSC is too generic you can refine the FSC to a specific keyword or words. You may decide to eliminate the category restriction and restrict to FSC as mention under "Restrict to FSC". This would help eliminate inappropriate bid matches that may fall under that category.

Example:

Restrict fsc!5930
Select switch or switches

Do not add in CAT 59. If CAT 59 was in the profile it may pull in bids for resisters, capacitors, fuses, etc.

If the client cannot manufacture any parts for the federal government, you may decide to eliminate bids with NSNs and bids from the Supply Centers (*restrict not NSN, restrict not sec:dla*).

If a client does not want to see any bids for critical application, add to the profile restrict not critical<>application. See Restrict Not section above.

If a client only wants to see bids from the Supply Centers when drawings are available, restrict not the AMC codes that apply (restrict not AMC<4>4B).

Service FSC (r008) is not used in bids and will only match in EDI. Therefore if client is not searching EDI, service FSC is not required.

If client is not going to register in CCR, recommend eliminating federal searches unless using for subcontracting. Also eliminate all FSC, SIC and NAICS.

FSC vs. Category (FSG = Federal Supply Group):

What is the best way to search - FSC or Category or both?

Do you want to search them in the profile as keywords so the client receives all solicitations, which contain the FSC(s) or all solicitations from a particular category? If so the select statement would be:

> s*elect fsc!7010*
> *select cat:70*

The above is of course just an example. The first select would give the client all solicitations, which contain FSC 7010. The second select would give the client all solicitations for category (FSG) 70.

Please note that the 4 digit service FSCs such as *select fsc!r008* are not used in most databases.

Also if the FSC is less than four characters and does not have an asterisk (*) on the end it will never if it is more than four character you must use the "nsn!" in the front of the FSC and an asterisk at the end.

How are FSC (PSC) Service Codes different from FSC Supply Codes in the Profile Search?

Well besides the obvious that one is for services and the other for supplies, with the FSC supply codes you use the fsc! In front of the four digit code with the service codes you do not.

The federal supply codes match much more because they are used more often, but they are still not used in all notices and tend to be too generic. They are probably most widely used by DLA so that is why when you search on something like FSC 5310 most of the matches will be from the DLA data.

Both types of FSCs are **not** used in the USABid data, as stated above the supply FSCs are mainly used in the DLA data but are also used in the FBO.

The same rules still apply for searching, if you have *select fsc!10* this will not create any matches, it has to be *select fsc!10** but if the client actually wants all matches in category 10 the statement should be *select cat:10*.

The statements *select fsc!10** and *select cat:10* will create different results.

> *select cat:10* will give you all matches in category 10

> *select fsc!10** will give you all matches with an FSC in it that begins with 10 and can be from any category with in the category restrictions designated in the profile.

If there are more than four characters then it should be setup as *select nsn!* with an asterisk at the end.

And Not:

In this example the client is a machine shop and contains select Precision<>Machining but the search statement is matching on a company called Precision Machining Inc. To fix this add the following "and not" to the search term "precision machining":

> *select precision<1u>machining and not precision<>machining<>inc**

Note: The one thing about "and not" is that part of the "and not" statement in this case "inc" can be highlighted and listed under the Matching Terms of the clients output even though it is really not a matching term.

In this case we have to use an *and not* instead of a *restrict not* and the one fall back is that it can appear that the system is matching on whatever is being excluded on in the *and not* statement.

The exclusion on the CCR database as an *and not* will work better than an *ignore* but if we setup it up as a *restrict not* the client could miss some valid matches. Setting it up as an *and not* will mean the client will not match on "CCR database" as a stand alone statement but if one of their other keyword statements is in the notice they will still receive it. Example:

Changed:
> *select data<>base?*
> *select database?*

To:
> *select data<>base? and not (data<>base<3u>CCR or database<3u>CCR or central<>Contractor<>Registration<3u>database or Central<>Contractor<>Registration<3u>data<>base) select database? and not (data<>base<3u>CCR or database<3u>CCR or Central<>Contractor<>Registration<3u>database or Central<>Contractor<>Registration<3u>data<>base)*

Let's say there is a match on "precision machine" and the word "inc" is used elsewhere in the matching notice. Because of how the matching system works it will highlight the term "inc" even though it is not actually causing the match. Unfortunately there is nothing that can be done about this. You can find out more about how the bid match system highlights and listed and matching terms at:
> https://www.youtube.com/user/OutreachSystems

General Guidelines for Machine shops:
>> Value Proposition – what they are best at
>> Specific Metals
>> List of parts or materials where most profitable
>> ID what they are best at
>> What Contracting Officers are looking for
>> What is their end product
>> What MIL STD that they comply with

This link is to a Machine Shop Keyword checklist:
http://www.ctptap.org/images/CH_Profile_Machine_Shop_Keywords_List.pdf

Colette pointed this out. If inappropriate bids are coming up for your machine shops and you haven't already excluded categories b,d,t,w,x,70,71,72 and 89 you might want to do so. This is something OutreachSystems feels works well.

Machine Shop Services

restrict not cat:b,d,t,w,x,70,71,72,89

select block?<1u>(blueprint* or blue<>print*)
select cad<>cam
select cnc<1u>bending?
select cnc<1u>component?
select cnc<1u>cutting?
select cnc<1u>lath*
select cnc<1u>machin*
select cnc<1u>milling?
select cnc<1u>punching?
select cnc<1u>tooling?
select cnc<1u>turning?
select c<>n<>c<1u>bending?
select c<>n<>c<1u>component?
select c<>n<>c<1u>cutting?
select c<>n<>c<1u>lath*
select c<>n<>c<1u>machin*
select c<>n<>c<1u>milling?
select c<>n<>c<1u>punching?
select c<>n<>c<1u>tooling?
select c<>n<>c<1u>turning?
select conventional<1u>machin*
select coordinate<1u>measuring
select custom<1u>fabricat*
select custom<1u>machin*
select custom<1u>part?
select die?<1u>cast*
select die?<1u>pressur*
select die?<1u>tool*<2u>design*
select high<>speed<1u>milling?

select iso<>complian*
select laser?<1u>cutting?
select long<1u>production<1u>run?
select machine?<>shop?
select machining?<1u>service?
select manual<>machin*
select metal<1u>lath*
select metalwork*<1u>lath*
select mil<>std<1u>certif*
select mil<>spec?<1u>certif*
select milling?<1u>machin*
select plastic?<1u>injection?<1u>mold*
select plasma<1u>cutting?*
select precision<1u>(blueprint* or blue<>print*)
select precision<1u>fabricat*
select precision<1u>lath*
select precision<1u>machin*
select precision<>(cnc or c<>n<>c)
select proto<>typ*<1u>machin*
select proto<>typ*<1u>part?
select proto<>typ*<1u>rapid?
select prototyp*<1u>machin*
select prototyp*<1u>part?
select prototyp*<1u>rapid?
select quality<>assurance<5u>lath*
select quality<>assurance<5u>machin*
select quality<>assurance<5u>precision
select reverse<1u>engineer*
select short<1u>production<1u>run?
select spin<2u>form?
select ti:boring?
select ti:casting?
select ti:forging
select ti:grinding
select ti:grinding?
select ti:honing?
select ti:milling?
select ti:(prototyp* or proto<>typ*)
select ti:solder*
select ti:tooling
select ti:welding?
select tooling<1u>design*
select tooling<1u>machin*
select turning<1u>milling?
select welding?<1u>assembl*
select welding?<1u>custom*
select welding?<1u>fabricat*
select welding?<1u>metal?
select welding?<1u>mig?
select welding?<1u>servic*
select welding?<1u>stainless*

select welding?<1u>steel*
select welding?<1u>tig?
select wire<>edm

CAGE Code:

The CAGE! is not needed when the CAGE code has a letter in it. Karen does not use the CAGE! in the front because it is not necessary. If the CAGE code is all numbers then Karen uses it so it does not match on dollar values etc.

The CAGE!, NAICS! and NSN! are indexes specifically categorizing the code as a CAGE, NAICS or NSN and does not appear in the solicitation. Proximity markers < and > cannot be used in conjunction with these search indexes. For instance   Select CAGE! 1234T<2u>bolt will not work because the CAGE is not part of the solicitation so it will never be within any proximity to keywords.

Example:
select 0CSA0
select 0WL07
select 1EEW7
select 3CKP8
select 7H360
select 8T069
select CAGE!03123
select CAGE!28006
select CAGE!39796
select CAGE!58353
select CAGE!65400

Question: I was testing profile # 001686 and noticed the warning: proximity on a an expression lacking proximity information; proximity ignored error messages. Do we need to add "and" to these statements like the others in the profile or?

select (Sikorsky or Kaman or cage!78286 or cage!84955)<2u>(RH or LH or
        Right<>Hand* or Left<>Hand*)<1u>mount?<1u>(assy or assembly)
select (Sikorsky or Kaman or cage!78286 or cage!84955)<2u>(RH or LH or
        Right<>Hand* or Left<>Hand*)<1u>pintle?<1u>(assy or assembly)
select (Sikorsky or Kaman or cage!78286 or cage!84955)<2u> (adaptor? or
        adapter?)<1u>blower?
select (Sikorsky or Kaman or cage!78286 or cage!84955)<2u> (airframe? or
        aircraft? or helicopter?)<2u>(component? or parts)
select (Sikorsky or Kaman or cage!78286 or cage!84955)<2u> (assem* or assy? or
        assmb*)<2u>(seal? or plenum? or liner? or duct? or ring?)
select (Sikorsky or Kaman or cage!78286 or cage!84955)<2u> (body? or
        bodies)<1u>(assy or assembly)
select (Sikorsky or Kaman or cage!78286 or cage!84955)<2u> (body? or
        bodies)<1u>valve?

>> s (Sikorsky or Kaman or cage!78286 or cage!84955)<2u>(RH or LH or   Right<>Hand* or Left<>Hand*)<1u>mount?<1u>(assy or assembly)

       10 sikorsky
        0 kaman
        6 cage!78286
        0 cage!84955
       10 rh
        7 lh
      348 right
      269 hand*
        5 right<>hand*
       30 left
      269 hand*
        3 left<>hand*

warning: proximity on a an expression lacking proximity information; proximity ignored

Answer: The issue is that terms like cage! or naics! or nsn! can't be used next to a proximity marker. The phrase before the actual CAGE value "cage!" doesn't exist in the solicitation but is an index specifically categorizing the code as a CAGE.

There are two alternatives: one, remove the cage! tag from the profile altogether and just search on "84955". The danger of course is false positives as the number might be a zip code or part number. Two, we make separate statements for the CAGE codes, combining them with the keywords using AND. So the phrase…

select (Sikorsky or Kaman or cage!78286 or cage!84955)<2u>(RH or LH or Right<>Hand* or
        Left<>Hand*)<1u>mount?<1u>(assy or assembly)

would be replaced by

select (Sikorsky or Kaman)<2u>(RH or LH or Right<>Hand* or Left<>Hand*)<1u>mount?<1u>(assy or assembly)

and

select (cage!78286 or cage!84955) and (RH or LH or Right<>Hand* or   left<>Hand*)<1u>mount?<1u>(assy or assembly)

Do capital letters make a difference (Forcing Case Sensitivity)?

They do not unless you put an explanation point (!) in the front of the word. So if you search for "IT" that will match on "it" or "It" or "IT" etc. but if it is listed as "!IT" then the bid match system will only match on "IT" all upper case. The explanation point in front of a word or acronym forces case sensitivity so that the bid match system will only match on that word as written.

We do not need to put the explanation point in front of every acronym, it is best not to so we pick-up on the matches where the acronym is not written however it is supposed to be spelled. But in the case of "IT" or "DEC" it is best to use it, but we do not need to for things like SBIR.

Federal Grants:

If a client would like to receive all Federal Grants add *select age:fedgrants* to profile. No need to add *select cat:a.*

Most of the notices under FedGrants appear in category A. If a client would like to search the Federal Grants but they do not want their search terms to match against all of category A you can add "*or age:(fedgrant? or fed<>grant?)*" to the category restriction line. Example: the profile contains: "restrict cat:17,20,49" we would change it to:

> *restrict cat:17,20,49 or age:(fedgrant? or fed<>grant?)*

If the client only wants to match on the FedGrants when it also contains one of their keywords, only add the "or age:(fedgrant? Or fed<>grant?) to their category restriction line.

Broad Agency Announcements:

BAA's normally appear under category A. If a profile is searching in category A and the client only wants to match on a BAA when one of their keywords is also mentioned in the BAA you do not need to add anything.

If the client did not match on a particular BAA then they would need to add keywords to their search profile to match on those types of BAA's in the future. Just as if they had missed a match, we would need to add other keywords that were in that match so they match on similar notices in the future. If the client wants to see all BAA's make sure they are searching in category A and add the search terms:

> *select BAA*
> *select broad<>agency<>announcement?*

Multiple Search Criteria:

Question: We have a client that wants to do another search but with a different set of parameters (he still wants the original search criteria). Do we have to set up another client record and number for them? Or is there a way to use the same number with like and "a" and "b" after the original client number?

Answer: As long as the output can go to the same e-mail address and the matches do not have to be separated out, so that all the matches for the original search are together and all the matches for the new search are together, you can use the same profile. To do this we would use a "unrestrict" which starts a new search so you can use all new restrictions; it is like having two profiles under one.

If the output must be separated out and/or is to go to a different e-mail address then you would need to create a new (second) profile for the client. If the client's original profile is say ID 00XXXX then the new criteria could be under 00XXXXb. The down side to this is you will not see this profile in Neoserra since there is no client record for the Profile ID 00XXXXB in Neoserra.

Profile Testing using iSearch:

Question: Why does a profile sometimes generate more matches on iSearch than my client receives?

Answer: iSearch's profile test feature ignores the exclusion statements that exist in your program's Global file. A typical Global file will contain exclusion statements that prevent sole source bids and bids without exception from matching on a client's profile. Similarly, iSearch's profile test feature does not take into consideration global ignore files that may exist in a profile. When these exclusion and ignore statements are out of the picture, more matches can result. But even though the exact number of matches shown at iSearch may differ slightly from the numbers received by your client, this feature will still give you an excellent idea of the overall profile performance.

Question: Why are the option statements ignored?

Answer: The option reportonly and the option transport statements will always show a status of ignored in iSearch's test results because these statements carry information regarding how the resulting bid matches should be delivered and tracked. Because you are only testing the profile on iSearch and not actually delivering the output, these statements are of no interest to iSearch.   iSearch has FBO bids back about 1 year.

Question: Why doesn't the count of all matches to a keyword phrase show?

Answer: The processing of testing and sending results to the iSearch website timed out on the search term "services" since it is such a common word. The actual bids that matched are shown in the results.

Question: I was testing Profile # 003489 and got these messages. Is there some kind of problem or is it just in the test?
```
  >> s decorative<2u>(stonework* or stone<>work* or stone?)
     9  decorative
     0  stonework*
    56  stone
  1814  work*
warning: proximity on a an expression lacking proximity information; proximity ignored
    45  stone<>work*
    58  stone?
warning: proximity on a an expression lacking proximity information; proximity ignored
     2  decorative<2u>(stonework* or (stone<>work*) or stone?)
```

Answer: Unfortunately, the search engine is a bit verbose and it tells you each time you have an empty proximity. It has been there for the last 20 years, so it isn't anything new and it only gives you this warning when the proximity is empty (i.e. <> instead of <1u> or even <2>).