Government ClauseAutomation v21.1.1.0 PDF

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☑ This content applies solely to Government Clause Automation, which must be purchased separately from the Appian base platform. This content was written for Appian 21.1 and may not reflect the interfaces or functionality of other Appian versions.

Government Clause Automation Overview

Introduction

The Appian Government Clause Automation (GCA) solution combines the best qualities of Appian's acquisition solutions with a centralized source for FAR and agency specific supplement clauses and provisions to streamline the creation of contract clauses. The solution provides a set of clauses to your contracting personnel based on characteristics of the procurement, wizard driven information collected from the user, and configurable business rules derived from regulation prescriptions. The flexible and configurable architecture makes it easy to configure for your organization's unique clause selection process. With GCA, your contracting professionals can easily create and update clauses for their solicitations and awards. Best news is it can be ready to deploy within weeks!

This page is just an overview of all the BIG features Appian Government Clause Automation has to offer. Check out What is Appian Clause Automation for a comprehensive overview of the application.

Simplify, accelerate, and optimize clause selection

When it comes to being able to effectively create and manage the specific clauses needed for your agency's contracts, the solution you use is a key factor. The process can be time consuming and lengthy with contracting personnel looking through hundreds of clauses with

little guidance into what clauses to include. The right solution can drive better outcomes, save time, and reduce guesswork and errors.

What if you could quickly and efficiently create and manage your clause selection process in a simple to use application without having to overhaul your entire process?

No matter how unique or complex your processes, you can configure GCA to meet your specific needs. Additionally, GCA allows your teams to collaborate in a single application, which eliminates the need for users to work with multiple applications and windows. This streamlines your processes and information and reduces the errors in setting up your evaluation process, allowing you to execute on activities faster.

What does Appian Government Clause Automation provide?

Guided and automated clause selection process

A wizard guides you and your end users through the process of selecting clauses by entering their contract data, selected templates, and answering your agency questionnaire. The solution will automatically suggest required, applicable, and optional clauses to your contracting personnel.

Configurable clause templates

Establish templates of clauses that contracting personnel should use in specific scenarios. For instance, create a template of clauses and provisions needed for a fixed price services contract that contains all the base clauses your agency requires for these types of contracts. This ensures a no important clauses are missed when they should be included on every clause supplement.

Templates

Search Templates | SEARCH | STATUS | Any

| Template	Description	Last Updated
● Commercial IT Services > SAT	Use with commercial IT Services solicitations / contracts greater than the simplified acquisition threshold	Jul 6, 2021 4:27 PM
● Small Business Set Aside - Services	Use for solicitations and contracts that will be set aside for Small Business concerns in delivery of services	Jul 6, 2021 3:58 PM

Configurable questionnaire

Create your own agency question bank and questionnaire to assist in selecting clauses needed. You can establish rules for the questionnaire to automatically assign specific clauses based on a questionnaire answer or group of answers.

▦ QUESTIONNAIRES ❓ QUESTIONS ✔ RULES

+ NEW QUESTIONNAIRE 🗑 DELETE QUESTIONNAIRE ★ SET DEFAULT ⎘ CLONE QUESTIONNAIRE

	Name	Default	Description	Date Created ↓	Last modified
☐	**Agency Questions**	★		Jul 7, 2021	Jul 7, 2021 6:19 PM by Neil Taylor

Acquisition.gov integration

To ensure your FAR clauses are kept up-to-date, GCA allows you to integrate with Acquisition.gov and bring the FAR clauses you need directly into your application.

52.223-18 | Encouraging Contractor Policies to Ban Text Messaging While Driving.

SYNC WITH ACQUISITION.GOV
Sync Clause with Acquisition.gov

Summary | Clause History | Related Actions

DETAILS

Type
Clause

Source
FAR

Section
I

Effective Date
Jun 2020

Format
Incorporated By Reference (IBR)

Fill-ins
No

Editable
No

Status
Active

CLAUSE PRESCRIPTION

Number
23.1105

Text

23.1105 Contract clause.

The contracting officer shall insert the clause at 52.223-18, Encouraging Contractor Policies to Ban Text Messaging While Driving, in all solicitations and contracts.

CLAUSE TEXT

52.223-18 Encouraging Contractor   Policies to Ban Text Messaging While Driving.

As prescribed in 23.1105, insert the following clause:

Encouraging Contractor Policies to Ban Text Messaging While Driving (Jun 2020)
(a) *Definitions.* As used in this clause–

"Driving"–
(1) Means operating a motor vehicle on an active roadway with the motor running, including while temporarily stationary because of traffic, a traffic light, stop sign, or otherwise.

(2) Does not include operating a motor vehicle with or without the motor running when one has pulled over to the side of, or off, an active roadway and has halted in a location where one can safely remain stationary.

Text messaging means reading from or entering data into any handheld or other electronic device, including for the purpose of short message service texting, e-mailing, instant messaging, obtaining navigational information, or engaging in any other form of electronic data retrieval or electronic data communication. The term does not include glancing at or listening to a navigation device that is secured in a commercially designed holder affixed to the vehicle, provided that the destination and route are programmed into the device either before driving or while stopped in a location off the roadway where it is safe and legal to park.
(b) This clause implements Executive Order 13513, Federal Leadership on Reducing Text Messaging While Driving, dated October 1, 2009.

(c) The Contractor is encouraged to–
(1) Adopt and enforce policies that ban text messaging while driving–
(i) Company-owned or rented vehicles or Government-owned vehicles; or

(ii) Privately-owned vehicles when on official Government business or when performing any work for or on behalf of the Government.
(2) Conduct initiatives in a manner commensurate with the size of the business, such as–

Simplify your clause management

GCA allows your agency to maintain their agency specific regulations along side the FAR clauses and provisions creating a centralized source for your contracting personnel. This allows your contracting personnel to focus on the clauses needed and not collecting them from different repositories.

appian CLAUSE SETS **CLAUSES**				Clause Automation ▾

Clauses

Search Clauses	SEARCH	TYPE Any ▾	SOURCE Any ▾	EFFECTIVE DATE Any ▾

Clause	Section	Prescription Number	Last Updated	Last Sync
52.223-18 | Encouraging Contractor Policies to Ban Text Messaging While Driving. *Clause • FAR • Jun 2020*	I	23.1105	May 28, 2021 10:47 AM	Jul 2, 2021 11:42 AM
52.217-9 | Option to Extend the Term of the Contract. *Clause • FAR • Mar 2000*	I	17.208	May 28, 2021 10:50 AM	Jul 2, 2021 10:45 AM
52.202-1 | Definitions. *Clause • FAR*	I	2.201	Jul 24, 2021 1:00 AM	Jul 24, 2021 1:00 AM
52.223-18 | Encouraging Contractor Policies to Ban Text Messaging While Driving. *Clause • FAR • Jun 2020*	I	23.1105	Jul 2, 2021 9:18 AM	Jul 2, 2021 9:18 AM
52.202-1 | Definitions. *Clause • FAR • Jun 2020*	I	2.201	Jul 2, 2021 9:21 AM	Jul 2, 2021 9:20 AM
52.203-2 | Certificate of Independent Price Determination. *Provision • FAR*	-	3.103-1	-	Jul 2, 2021 10:11 AM
52.203-3 | Gratuities. *Clause • FAR*	I	3.202	Jul 24, 2021 1:00 AM	Jul 24, 2021 1:00 AM
52.203-5 | Covenant Against Contingent Fees. *Clause • FAR*	-	3.404	-	Jul 2, 2021 10:11 AM
52.203-6 | I *Clause • FAR*	I	3.503-2	Jul 24, 2021 1:00 AM	Jul 24, 2021 1:00 AM
52.203-7 | Anti-Kickback Procedures. *Clause • FAR*	-	3.502-3	-	Jul 2, 2021 10:11 AM
52.203-8 | Cancellation, Rescission, and Recovery of Funds for Illegal or Improper Activity. *Clause • FAR*	-	3.104-9	-	Jul 2, 2021 10:12 AM

Automated clause validation process

The application provides a clause validation process to ensure fill-ins and edits are complete as well as ensuring the latest clause version is being used before the user can finalize their clause supplement document. This improves the quality of clause supplements your contracting personnel are creating.

Update clause fill-ins and edits in single location

Contracting personnel need to complete their fills-in and edits to finalize a clause supplement. GCA allows you to break down process barriers and perform the tasks necessary to finalize your clause supplements in one location. summaries and approach visibility.

Edit Clause

Clause 52.217-9 | Option to Extend the Term of the Contract.

Clause Text *

Normal Text ▾ Standard ▾ B I U S A A 🔗 ☰ ☷ ☷ ☷ ☷ Tx

52.217-9 Option to Extend the Term of the Contract.

As prescribed in 17.208(g), insert a clause substantially the same as the following:

Option to Extend the Term of the Contract (Mar 2000)
   (a)The Government may extend the term of this contract by written notice to the Contractor within ; provided that the Government gives the Contractor a preliminary written notice of its intent to extend at least days[*60days unless a different number of days is inserted*] before the contract expires. The preliminary notice does not commit the Government to an extension.

   (b)If the Government exercises this option, the extended contract shall be considered to include this option clause.

   (c)The total duration of this contract, including the exercise of any options under this clause, shall not exceed .
   (End of clause)

CANCEL   SAVE AS DRAFT   **MARK AS COMPLETE**

Full transparency with a single clause set views

To manage the clauses needed for a supplement, your contracting personnel need to be able to see all the clauses added and available in a single view. GCA allows you to break down process barriers and clarify the status of your clause set through clause set summaries.

Secure and fast deployment

GCA has what it takes to make your clause selection process successful through its entire deployment, configuration, and implementation life cycle. De-risk your deployment with the security, scalability, and reliability your customers demand. Rapidly respond with a flexible configuration that adapts to your processes and regulations.

Get started now

Ready to get started? Check out the browser on the left for a quick overview of the content covered in the GCA documentation.

What is Government Clause Automation?

Introduction

The Appian Government Clause Automation (GCA) solution is a customizable application built on Appian's low-code platform using expert knowledge and best practices for acquisition

processes. This solution allows government agencies and federal civilian agencies to provide a guided automated experience for creating clause supplement documents. This allows organizations to efficiently select the correct clauses needed for their agency.

The application consists of a main work space that is made up of the following site features:

- The Government Clause Automation site allows all users to:
  - **Create and update a clause set**: Enter in contract details, select a template, and answer questions to get suggested clauses.
  - **Fill-ins and Edit**: Upload all the vendor and evaluation documents through a guided experience.
  - **Validate and finalize clause set**: Select configurable approaches when the evaluation is created or add configurable approaches when evaluation events occur. Add, edit, and rearrange those tasks as needed. Each evaluation approach is completely configurable.
  - **Maintain visibility into status of clause set**: View all of the data for a clause set in one location. Allow your departments to see the status of the clause set.
- The GCA site allows privileged users to:
  - **Manage Templates**: Use phases to group approach tasks together, usually by the function of the task or the group that performs the tasks. Business users can update these phases as their needs change.
  - **Manage a Library of questions**: Create a library of questions that make it easy to determine what clauses to add to a clause set.
  - **Keep questionnaires up to date**: Realize that users are always missing a clause in their supplements? Add a question to the questionnaire to make sure it isn't missed. Remove the task. Have a new category of questions? Create a new category and questions in your questionnaire. Your questionnaire can be as flexible as you need them to be. GCA is designed to help you make an clause selection questionnaire set up quick and easy.
  - **Manage questionnaire rules**: Establish a questionnaire rule for each question answer and associate specific clauses with the answers. Realizing a regulation makes more clauses needed add a new rule.

Clause creation example

Let's take a look at an example scenario:

Acme Agency awarded a new contract and needs to send the vendor the award document. A contracting professional is responsible for selecting all the clauses needed for the clause supplement document. They are also responsible for ensuring the fill-in clauses and editable clauses are completed on time, with the correct data.

To complete this part of the process, the contracting professional can enter enter award details to see the suggested clauses and whether they are required, applicable, and optional clauses. The required clauses will automatically be assigned to the clause set and they can manually add any applicable or optional clauses. To increase the number of required clauses, they can also select templates and answer a questionnaire tailored for their agency's needs. By reducing the number of clauses they need to review and determine whether to include, contracting personnel will create clause supplement documents faster and with greater accuracy.

Clause Automation Site

Home page

When you log in to the GCA site, the **CLAUSE SETS** page displays. This page contains several features that help business users get a quick view of information that is pertinent to them:

1. Clause sets assigned to current user display in tabs across the page.
2. Clause set record display in **ALL** tab.
3. Action shortcuts to **CREATE CLAUSE SET**.

Additionally, the top of the page contains links to the records for **CLAUSES**. For privileged users, the top of the page will contain links to the records for **TEMPLATES** and **QUESTIONNAIRES**.

Record lists

Clicking any tab on the top of the page takes you to the associated record list. From the record list page, you can:

1. **CREATE CLAUSE SET** or **ADD CLAUSE**.
2. Search and filter the record list.
3. View a short summary of information about the records.
4. Click a name to open the associated record summary view.
5. Export the record list to Excel, clear filters, and refresh the record.
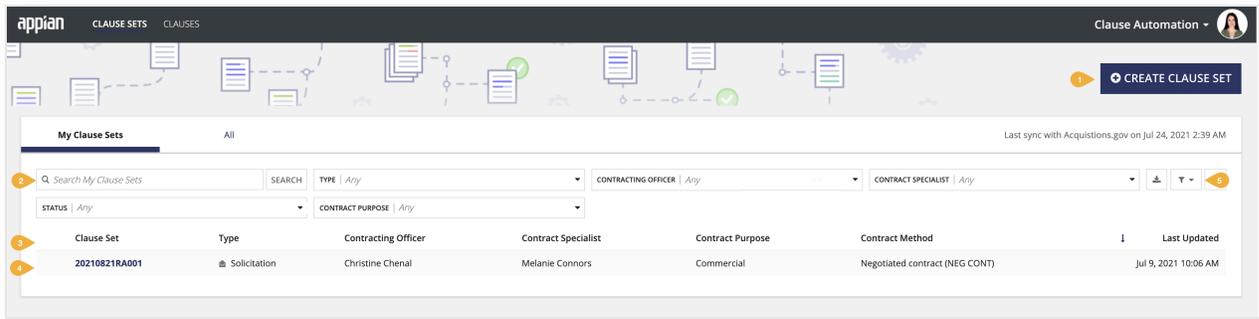
GCA Features

Appian's Government Clause Automation (GCA) contains a wide range of features for contracting personnel and administrators.

The tables below provides a quick reference of the available features.

Feature Matrix

Functional Area	Feature	Description
Clause Automation Site (All Users)	Clause Set Summary Landing Page	A view of clause sets highlighting **My Clause Sets** and **All**.
	Create Clause Set Wizard	A guided process to get required, applicable, and optional clauses needed based on contract details, templates and a questionnaire.
	Finalize Clause Set	Ability to validate and finalize the clause set to create the supplement clause document.
	Validate Clause Set	Ability to validate the clauses have the fill-in data, have been edited, and are the most recent version.
	View Document	Ability to view draft or finalized document.
	Remove Clauses	Ability to remove a clause from the clause set and provide a reason for required clauses.
	Edit Clauses	Abiity to edit clauses in a clause set and provide fills-in.
	View Clause	Ability to view the clause and prescription text for a

		clause in the clause set.
Records	Clause Set	A defined clause set record that stores groups of clauses needed in an individual clause supplement.
	Clause	A defined clause record.
Integrations	Acquisition.gov	Ability to retrieve FAR clause data and FAR Matrix data from Acquisition.gov.
Clause Automation Site (Privileged Users)	Templates	Ability to add a template of common clauses to help start a clause set.
	Questions	Ability to add questions and expected responses to a question bank.
	Questionnaire	Ability to configure a questionnaire from questions available in the question bank.
	Rules	Ability to setup associate clauses to questionnaire answers.

Installing GCA

Introduction

Installing Government Clause Automation (GCA) consists of five main steps:

1. Download the software package.
2. Deploy GCA plug-ins to the Appian environment.
3. Create the database objects in the business data source.
4. Import the GG application into the Appian environment.

Before starting the installation process, review the System Requirements to make sure all minimum requirements are met.

System requirements

- Appian version 21.2 for GCA 1.0.0.
- A supported version of a MariaDB database as a business data source.
  - **Note**: Instructions below are tailored for MariaDB databases. For use with other databases, the SQL scripts used in Step 3 will need to be modified.
- A supported web browser.

Step 1: Download software package

To install GCA, you'll need to download the software package that contains the following files you'll use in the remaining set up steps.

- **AS GCA SQL Deployment.sql**: SQL script for creating the database objects needed for the GCA application.
- **AS GCA Applications.zip**: Application package to import into Appian.
- **AS GCA AdminConsole.zip**: Export of the default start pages of the admin console.
- **AS GCA Applications.properties**: Import customization file for configuring the application package.
- **appian-solutions-1.11.2.jar**: JAR file used to deploy the `Appian Solutions` plug-in for self-managed environments.
- **content-tools-1.3.2.jar**: JAR file used to deploy the `Content Tools` plug-in for self-managed environments.
- **Appian-Regular-Expression-Functions_2.1.2.jar**: JAR file used to deploy the `Regular Expression Functions` plug-in for self-managed environments.
- **rich-text-editor-1.4.0.zip**: ZIP file used to deploy the `Rich Text Editor` plug-in for self-managed environments.

To download the software package:

1. Go to the **SUPPORT** tab on My Appian.
2. Click the **DOWNLOADS** tab.
3. Click **SOLUTIONS**.
4. Find and open *Clause Automation V21.2.1.0.0*.
5. In **Downloads**, click the **Download Clause Automation** link.
6. Click **PROCEED** to agree to the License Agreement.
7. Click **Download Clause Automation v21.2.1.0.0** to download the ZIP file.
8. Unzip `GCA Components v21.2.1.0.0.zip` to access the software installation files.

Step 2: Deploy plug-ins

For the GCA application to work, you must deploy the `Appian Solutions`, `Content Tools`, `Regular Expression Functions`, `Rich Text Editor` plug-ins. The steps for deploying plug-ins are different for an Appian Cloud or self-managed environment. Be sure to note which set of deployment steps you need for your environment.

Appian Cloud Environments

To deploy the plug-ins for an Appian Cloud environment:

1. In the target environment, log in as the deployment user.
2. Navigate to the **Admin Console**.
3. On the left side of the console, click **Plug-ins**.
4. Click **ADD PLUG-INS**.
5. Search for and click `Appian Solutions`.
6. Click **DEPLOY**.
7. Search for and click `Content Tools`.
8. Click **DEPLOY**.

9. Search for and click `Regular Expression Functions`.
10. Click **DEPLOY**.
11. Search for and click `Rich Text Editor`.
12. Click **DEPLOY**.

Self-Managed Environments

To deploy the plug-ins for a self-managed environment:

- Follow the Deploying Plug-ins instructions to deploy the `com.appiancorp.ps.solutions-1.7.0.jar` plug-in files that were downloaded in Step 1.

Step 3: Create database objects

In order to create the structure for the database tables, views, and other objects that are a part of the GCA application, you will need to run a DDL script in your database.

To create the database objects:

- In your database, run the `AS GCA SQL Deployment.sql` DDL file that was downloaded in Step 1.
- **Note:** This DDL file is optimized for MariaDB. If you are using a different type of database, the DDL file may need to be modified.

Step 4: Import the application

The final step needed is to install the GCA application by importing the application files into the target environment.

To import the application:

1. In the target environment, log in as the deployment user.
2. Navigate to the **Appian Designer**.
3. Click **IMPORT**.
4. Click **UPLOAD** and choose the `AS GCA Applications.zip` file that was downloaded in Step 1.
5. Select **Include related import customization file**.
6. Click **UPLOAD**. Select the `AS GCA Applications.properties` file that was downloaded in Step 1.
7. Click **INSPECT**.
8. Review the inspection results. If there are no issues, click **IMPORT PACKAGE**.
   - **NOTE:** The import may time out due to file size, but import will continue in the background.

Step 5: Import the administration console settings

This step is an optional step that allows you to update the default start page. Import the Admin Console only if you want your current Default Start page overwritten.

For instructions on how to do this, see Appian Administration Console.

> If the business database is not called `Appian`, a warning will occur when importing the data stores. To fix this, after the import is complete, open each data store object and update the **Data Source** dropdown list.

Setting up GCA

Introduction

Government Clause Automation (GCA) is as flexible as any application developed on the Appian Platform. In order to make sure your application remains scalable and aligns with best practices, we have provided instructions to guide you through some of the most common changes.

After you have installed GCA, there are several configurations you will likely perform to customize the application for your organization's processes.

This page outlines the order we recommend for configuring the default application to work for your organization after installing GCA. However, all of these instructions can be used to modify the application at any time.

Updates in Appian Designer should be done with caution by someone familiar with Appian development.

Step 1: Configure user groups and security

Configuring user groups and security is a good place to start.

You will need to know:

- If your organization has any additional business roles that are not covered in the default business groups.
- What users should be members of each business group.

For more information on groups and security, see Groups Reference Page.

Step 2: Configure fields and UI text

Likely, certain fields and UI text throughout the set up process will not exactly match the terminology your organization uses for its clause automation process. You can modify the solution to fit your organization's processes and data requirements by configuring a number of the fields and labels.

The following fields and UI text are configurable:

- Create clause set wizard labels.
- Contracting personnel labels.

If you need to perform a mass update of the UI text, you can perform a bulk update by creating a custom bundle file that overrides the values in the default bundle files. When you create a custom bundle file, GCA will retain the values during future upgrades. See Modifying UI Text for more information on performing this bulk operation.

Alternatively, if you need to modify a small number of UI text for your GCA solution, these modifications are best done using the Solution Customization Suite. You can find more information about customizing UI text for your solution in the Solution Customization User Guide.

Step 3: Configure templates

After you configure your solution, you can create templates for use during the create clause set process. The template you select will determine which clauses will be automatically assigned to the clause set when each clause set is initiated.

You will need to know:

- What templates are needed
- What clauses should be added to the templates

When users start a new clause set, they can select from the available templates listed in the first step of the Create Clause Set wizard.

Step 4: Configure questionnaire and questionnaire rules

After you configuring your solution, you can create questions and questionnaires for used during the create clause set process. The questions selected for use in the questionnaire will determine the questions asked when each clause set is started.

You will need to understand your organization's current clause selection processes including:

- What categories of the questions can occur.
- What questions or group of questions will help narrow the clause selection process.
- What clauses should be added the clause set for question answers.

Step 5: Set up Acquisition.gov integration

Next, you will need set up Acquisition.gov integration, which allows you to retrieve FAR clause data and FAR Smart Matrix data from Acquisition.gov.

For instructions on how to do this, see Setting Up Acquisition.gov.

Setting up Acquisition.gov Integration

Introduction

Appian's Government Clause Automation comes with an Acquisition.gov integration. In order to utilize this capability, you will need to create a Github account and personal access token to use with the solution after you've configured it.

This page provides instructions for registering for your account and token then configuring your application.

Create Github account and token

To set up a Github account:

1. Navigate to https://www.github.com.
2. Enter email address in **Email address**.
3. Click **Sign up for GitHub>Continue**.
4. Create a password and click **Continue**.
5. Enter 'N'.
6. Enter a username and click **Continue**.
7. Click **Start Puzzle** and complete puzzle.
8. Click **Create account**.
    - Check your email for a notification from Github and enter code they provided.

To create a personal access token:

1. Navigate to https://github.com/settings/tokens.
    - **Note:** Make sure you're on the **Personal access token** page.
2. Sign-in to your Github account.
3. Select **Generate new token**.
4. In the **Note** field, enter a name.
5. For **Select scopes**, check **public_repo".
6. Click **Update token**.
7. Click **Copy/Clipboard** icon to copy the unique Id generated in the green section.

Be sure to create a personal access token for each environment where you have the solution deployed.

Configure application

After creating your account and personal access token, you will need to configure your application to use the saved token.

1. Access your Appian Designer.
2. In your application, select `AS GCA Full Application`.
3. On the left side under object type, select **Connected System**.
4. Select `AS GCM Github`.
5. Find the **Username** field, update it with username created step 8
6. Find the **Password** field, paste the saved personal access token.
7. Click **SAVE**.

Connected System Properties

Name *

AS GCM Github

Description

Connected system for GSA Github

System Logo ⓘ

Select a PNG image   ☰   ⊕

Base URL ⓘ

https://api.github.com/repos/

Authentication

Basic ▾

Credentials are encrypted and will not be included when this object is exported. Be sure to set environment-specific values by using an import customization file when importing into other Appian environments. Learn more

Username

1 [   ]

Password

********** (Clear)

☑ Send credentials preemptively instead of waiting for a 401 authentication challenge

CANCEL   USE IN NEW INTEGRATION   SAVE

Overview

How do I tailor a solution for my needs?

There are several activities that can be performed to tailor a solution to meet the specific needs of your organization. The table below describes the difference between a configuration and customization activity, and where to perform each type of activity within the solution.

Activity	Description	Where is it Performed?
Configuration	Adapting a solution for a range of scenarios by modifying the solution's out-of-the-box, front-end settings. Configurations do not involve code changes.	In Solution
Supported Customization	Customizing a solution for a range of scenarios by adding code via the Solutions Hub. Supported customizations do not modify the solution's source code but are performed in accordance with the customization steps and are upgrade friendly.	Solutions Hub
Customization	Changing a solution for a range of scenarios by modifying or extending the solution's code. Customizations are first implemented in a development environment and typically not supported by available configurations.	Appian Designer

Wherever possible, you should always explore configuration changes first, followed by Supported Customization via the Solutions Hub. If needed, and as a last resort, customize your solution via Appian Designer.

What is the Solutions Hub?

The Solutions Hub is an Appian site that enables Low-Code Developers to perform Supported Customizations on a compatible solution built on the Appian platform. These types of customizations enable the solution to meet the needs of their organization while preserving a clean upgrade path.

Supported Customization is intended for use in a development environment only, where these types of customizations should be performed and tested before being promoted to a higher environment.

Configuration changes are performed within the solution itself. The Solutions Hub also offers a Configuration Export & Import capability, which allows a set of solution configuration data to be exported from one Appian environment and imported into another. This capability is available in all environments that have compatible solutions built on the Appian platform.

Just as Amazon allows small business owners to set up and customize their own online storefront, the Solutions Hub allows you to truly make an Appian solution your own so that it meets the needs of your specific use case.

Supported Customizations made using the Solutions Hub are preserved when you upgrade to a new solution version. This means that when you upgrade your Appian Solution to get the new features, your previous customizations remain intact. This allows your organization to take on a newly released solution version as soon as it is available.

When should I use the Solutions Hub?

It is important to understand when you should utilize the Solutions Hub over customizing directly in Appian Designer.

Appian recommends using the Solutions Hub when:

- You want to modify your solution's branding.
- You want to modify text in the languages that ship with your solution.
- You want to add new text to support a customization.
- You want to modify images that ship with the solution.
- You want to add new user interface components, pages, or elements to the solution, and there's an applicable user interface customization template that fits your use case.
- You want to extend a process that ships with the solution, and there's an applicable workflow customization template that fits your use case.
- You want to adjust business logic that ships with the solution, and there's an applicable business logic customization template that fits your use case.
- You want to move a set of solutions configuration data from one Appian environment to another.
- **You want to preserve customizations and not have to reapply them each time you upgrade your solution!**

Each solution supports a varying degree of these use cases. You can find all of the available supported customizations for your solution by opening up the Solutions Hub on a development instance of your solution. If you need to install the latest version of the Solutions Hub, you can follow the steps in the installation guide.

Solutions Hub Installation Guide

Introduction

The Solutions Hub comes pre-installed on your development environment with any new solution offering or upgrade of an existing solution via Appian Cloud.

This page provides instructions for installing the Solutions Hub. Manual install is necessary if you:

- Are an on-premise customer.
- Want to receive the latest version and features of the Solutions Hub, but you haven't recently upgraded, or do not plan on upgrading, your Appian solution.
- Want to install the Solutions Hub on another development or customization environment outside of your Cloud-provisioned environments.

Technical support

Please call the dedicated solution help line for your region if at any point you need assistance or have questions:

- US: +1 (703) 420-1311
- AUS: +61 2850 34152
- UK: +44 20 3929 3748

All Appian Solution customers can also email Appian Support at support@appian.com or log in to Appian Community and open a support case to request assistance. Information on Solutions Support Services can be found here.

System requirements

- Appian 22.1 or later.
- A supported web browser.

Step 1: Download software package

To download the software package (as an existing Customer or Partner):

1. Go to the **SUPPORT** tab on My Appian.
2. Click **DOWNLOADS**.
3. Click **SOLUTIONS**.
4. Find and open "Solutions Hub v22.1.1.1.X", where "X" refers to the latest hotfix increment on this version's branch. Be sure to stay up to date on the latest hotfix increment by regularly visiting this page.
5. In **Downloads**, click the **Solutions Hub** installer link.
6. Click **PROCEED** to agree to the license agreement.
7. Click **Solutions Hub v22.1.1.1.X** to download the ZIP file.
8. Unzip `SolutionsHubv1.1.X.zip` to access the software installation files.

Locate the following installation files, some of which will be used in later steps.

- `appian-solutions-1.26.X.jar`
- `SolutionsHubv1.1.X.zip`
- `SolutionsHubv1.1.X-AdminConsole.zip`

Step 2: Deploy Plug-ins

The Solutions Hub relies on the *latest* version of the Appian Solutions Plug-in to be deployed in the target environment before the application can be imported. This plug-in is also a prerequisite for most Appian solutions, so it may already be installed on the target environment.

- Appian Solutions Plug-in (v1.26.X+)

Appian Cloud Environments

To deploy the plug-in for an Appian Cloud environment:

1. In the target environment, log in as the deployment user.
2. Navigate to the **Admin Console**.

3. On the left side of the console, click **Plug-ins**.
4. Click **ADD PLUG-INS**.
5. Search for the plug-in by name. For example, `Appian Solutions Plug-in`.

6. Click on the plug-in name.
7. Click **DEPLOY**.

Self-Managed Environments

To deploy the plug-in for a self-managed environment:

1. Retrieve the latest version of the Appian Solutions Plug-in from the AppMarket. Alternatively, you can also use the `appian-solutions-1.26.X.jar` file downloaded in Step 1.
2. Follow the Deploying Plug-ins instructions to deploy the plug-in file.

Step 3: Import the application

Import the application into your target environment.

1. In the target environment, log in as the deployment user.
2. Navigate to the **Appian Designer**.
3. Click **IMPORT**.

4. Click **UPLOAD** and choose the `SolutionsHubv1.1.X.zip` file that was downloaded in
   Step 1.
5. Click **IMPORT PACKAGE**.

Step 4: Set User Start Pages

By default, the start pages contained in the `SolutionsHubv1.1.X-AdminConsole.zip` file set
the Solutions Hub site as the landing page and user start page for all Designers and System
Administrators.

If you already have user start pages configured, we recommend skipping this step. If you have
not already configured your user start pages, we recommend importing this file.

Follow the Importing Admin Console Settings instructions to import this file.

Next steps

After you finish installing the application, see the User Guide to learn how to use the Solutions
Hub.

Solutions Hub User Guide

The Solutions Hub is a standalone site that offers a number of features that allow you to
customize your solutions from a centralized dashboard. You can easily access the site from
your solution's development environment. If the Solutions Hub is not installed on your
development environment, you can follow the installation guide to install the suite.

The Solutions Hub User Guide is your quick reference guide to understanding of all of the
features the Solutions Hub has to offer and how to use them to customize different
components of your solutions.

Landing page

When you open the Solutions Hub, you'll see all of the solutions installed on the environment
that support customization through the Solutions Hub.
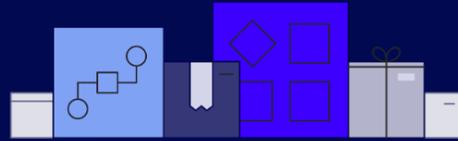
To access all of the available customizations for a given solution, click on the solution. If the solution is part of a solution "suite", then an additional **MANAGE SUITE CONTENT** button appears. For example, the Financial Services solution suite contains the Connected Onboarding, Connected Servicing, and Know Your Customer solutions. Any customizations common to all Financial Services solutions can be accessed by clicking the **MANAGE SUITE CONTENT** button.

Once in the context of a particular solution, you will be greeted with an overview of configuration & customization opportunities available for your solution. From here, you'll have the tools you need to configure & customize your Appian solution! There are links to the solution's configuration site(s), navigation tabs to each type of supported customization, and lastly a direct link to Appian Designer.

How do I tailor Financial Services Suite for my needs?

Wherever possible, you should always explore configuration changes first, followed by Supported Customization via this site. As a last resort, customize your solution via Appian Designer.

1

Configuration

Adapting a solution for a range of scenarios by modifying the solution's out-of-the-box, front-end settings. Configurations do not involve code changes.

Connected FS Settings ↗

System Administration Center ↗

2

Supported Customization

Customizing a solution for a range of scenarios by adding code via this site. Supported customizations do not modify the solution's source code, are performed in accordance with the customization steps, and are upgrade friendly.

THIS MODULE

3

Appian Designer

Changing a solution for a range of scenarios by modifying or extending the solution's code. Customizations are first implemented in a development environment and typically not supported by available configurations or supported customizations.

Appian Designer ↗

You can easily navigate context between solutions within the solution suite by selecting the desired solution from the dropdown.
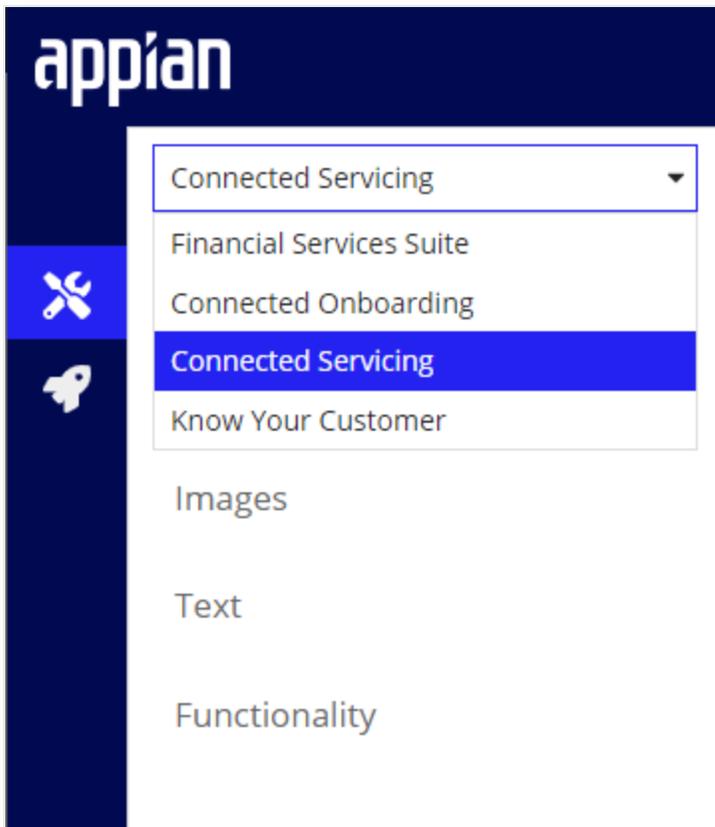
Types of customizations available

Government Clause Automation 21.1.1.0 supports the following customization categories. Each solution offers a varying degree of supported customization templates within each category.

Branding

The branding section allows you to customize your solution to match your organization's name, logos, and colors.

You won't have to go into multiple site objects on the back-end to configure the branding across your solution. It's all taken care of via the Solutions Hub. The best part? When you use the suite to customize the branding for your solution, you won't have to reapply the customizations when you upgrade your solution to the latest version.

The **BRAND** section allows you to quickly and easily customize the following three brand elements for a selected solution:

- Organization*
- Logos
- Colors

Branding changes made here impact the selected solution only, they do not affect the Solutions Hub branding. It's important to navigate to each solution's sites to view any branding changes you made.

Note: the organization name is visible only if your solution supports it.

Organization

The organization name should be reflective of your organization or company name.

This value is used in instances where the solution needs to refer to your organization. If left blank, the default name (typically the solution name) will take effect.

To update your organization name, click **UPDATE**. The UPDATE ORGANIZATION dialog will open, which allows you to update your organization name and save the changes.
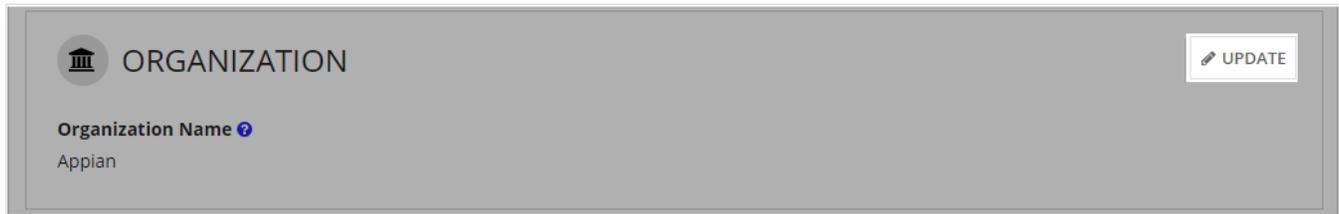
Logos

You can update logos to match your brand. Logos include the site logo that end users see within the solution's sites, as well as the favicon that appears in a user's active Web browser tab.

To update the logos in your solution, click **UPDATE**. The UPDATE LOGOS dialog displays with the current file for each image. Hover over the image you want to replace, and click **X** to remove the current file. Then, simply upload a new image. Site logo file types must be PNG. Favicon file types must be ICO. Be sure to save your changes when you are finished updating your logo or favicon file.

Colors

The branding section gives you control over the color palette that is used in the solution. Colors are used throughout your solution, from accenting selected items, to providing color to charts. This offers you the ability to set component colors for your solution, such as:

- Accent Color
- Selected Highlight Color
- Navigation Bar Color
- Loading Bar Color

If a solution utilizes charts, you can even set the color palette that is used to render the charts. An extended range of colors beyond the base set listed above may be available for certain solutions.

To modify the colors in your solution, click **UPDATE**. The UPDATE COLORS dialog appears, which allows you to change the color of each presented field. Colors must be entered as valid hex

codes.

Chart colors include pre-set color schemes, or you can enter your own set of hex codes by selecting **CUSTOM**

Once you have made your edits, click **UPDATE** to save your changes.

Text

The Solutions Hub provides a quick and comprehensive means to customize the text that ships with a solution without impacting future upgrades. This includes editing text that comes with the solution and adding new text.

Within the Solutions Customization Suite, navigate to **CONFIGURE & CUSTOMIZE –> TEXT**.
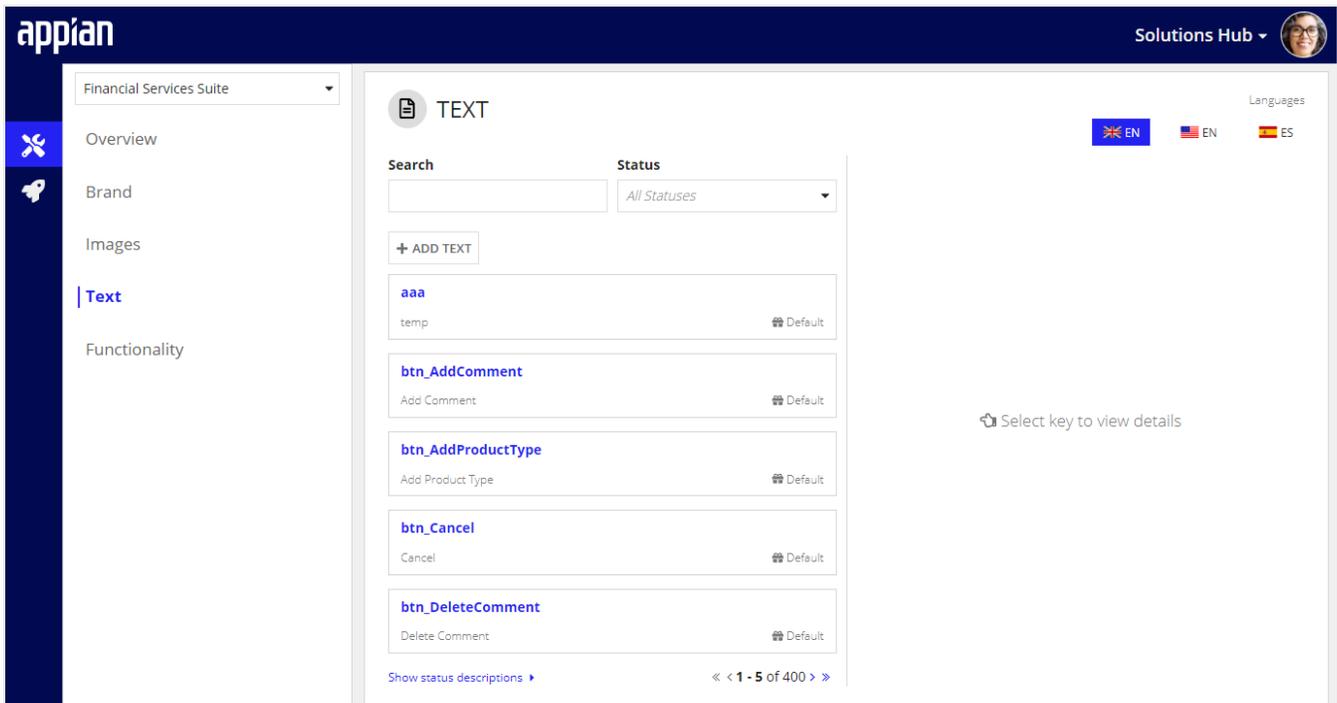
Using the language bar, first select the language for which you want to make changes. By default, English (en_US) is selected. Available languages include any that ship with the solution, or languages for which you added support.
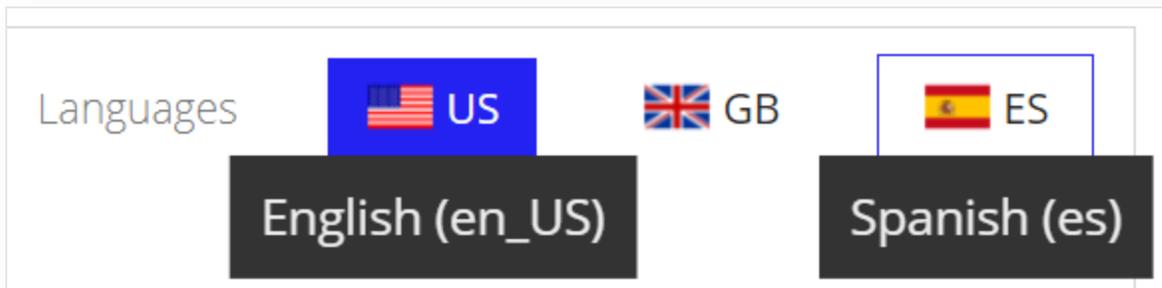
Once a language is selected, a grid shows all of the text within the solution for that language. The key, text, and status are shown on each card:
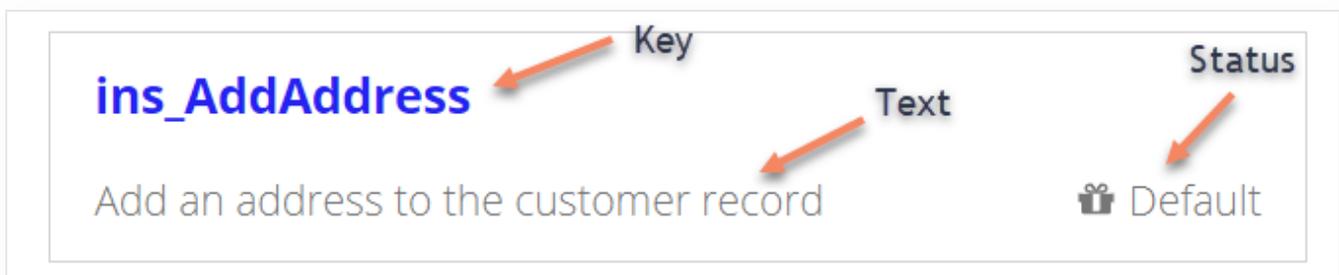
To narrow down the text set, there is a search component that allows full or partial searches on either the text key or value.

A status filter allows for easy filtering of the results. Text can have one of three statuses:

- **Default**: Text that is set to its out of the box value.
- **Edited**: Text that is modified from its default value.

- **Custom**: Text that has been added by a customer.
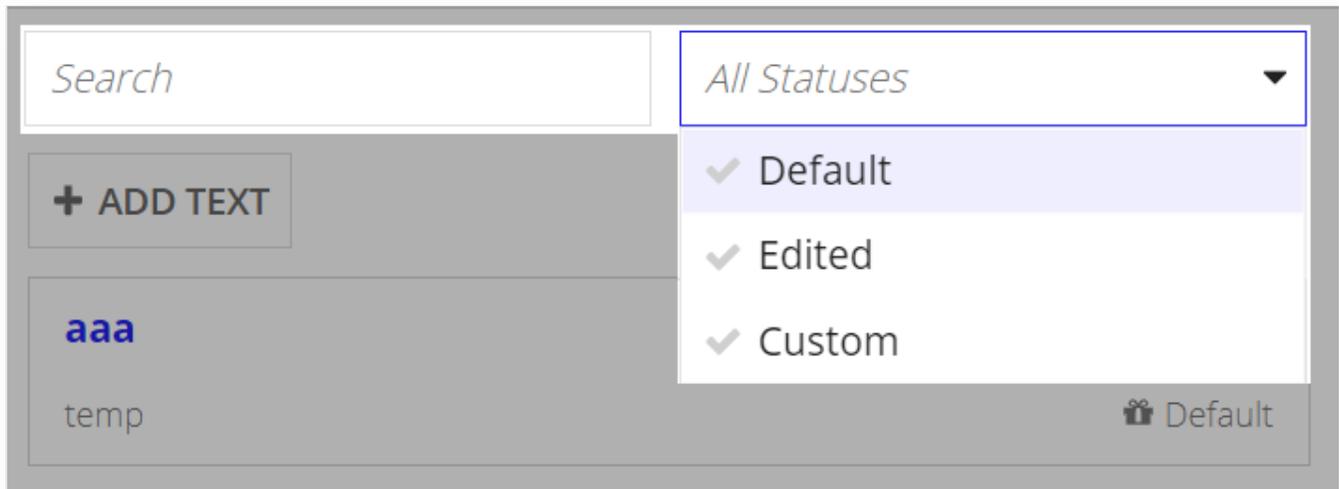
When a text card is selected, additional attributes can be viewed:

- **Key**: This is the unique identifier for a piece of text within a bundle file; the key appears on the top of the text card and the details section.
- **Text**: The value the text is currently set to and how it shows up to end users when the key is called.
- **Status**: Identifies the *current* status of the text.
- **Language**: This is the locale that this bundle file represents (e.g., en_US for English - United States).
- **Bundle Folder**: This is the Appian folder that contains the bundle file where the text is stored.
- **Bundle File**: This is the properties file that contains the text being viewed. The date and time displayed is when the file was last updated.
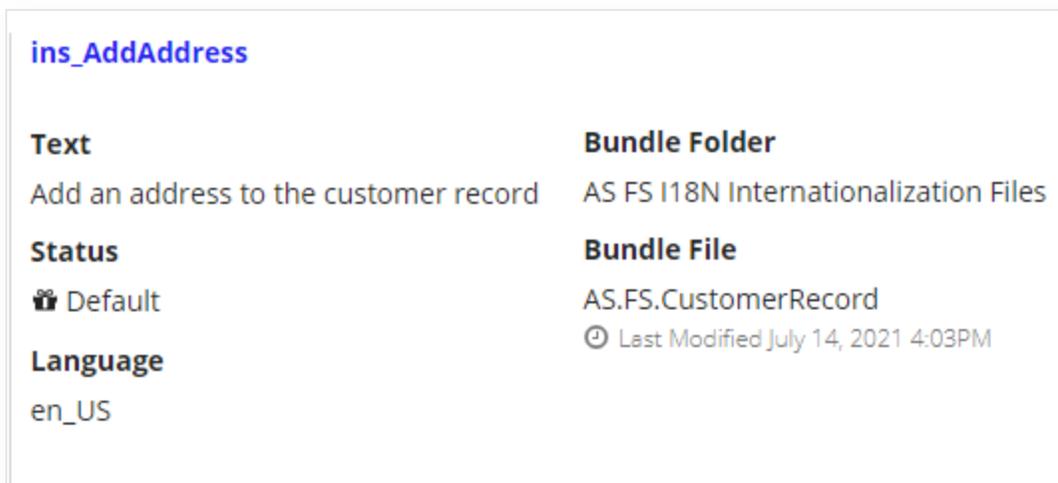
Editing text

To modify the text value, select a text card in the grid, and click **UPDATE**.

From here you can change the value of the text to your choosing. Click **UPDATE** to commit the change.

Adding custom text

To add new text to the solution, click **ADD TEXT**.

An in-line form appears. Enter a unique key that will serve as the reference to this text when calling it in your custom expressions, followed by the text value. If there are multiple bundle files present in the solution, you will first need to select the applicable one.

Click **SAVE**. A confirmation dialog indicates that the text was added successfully.
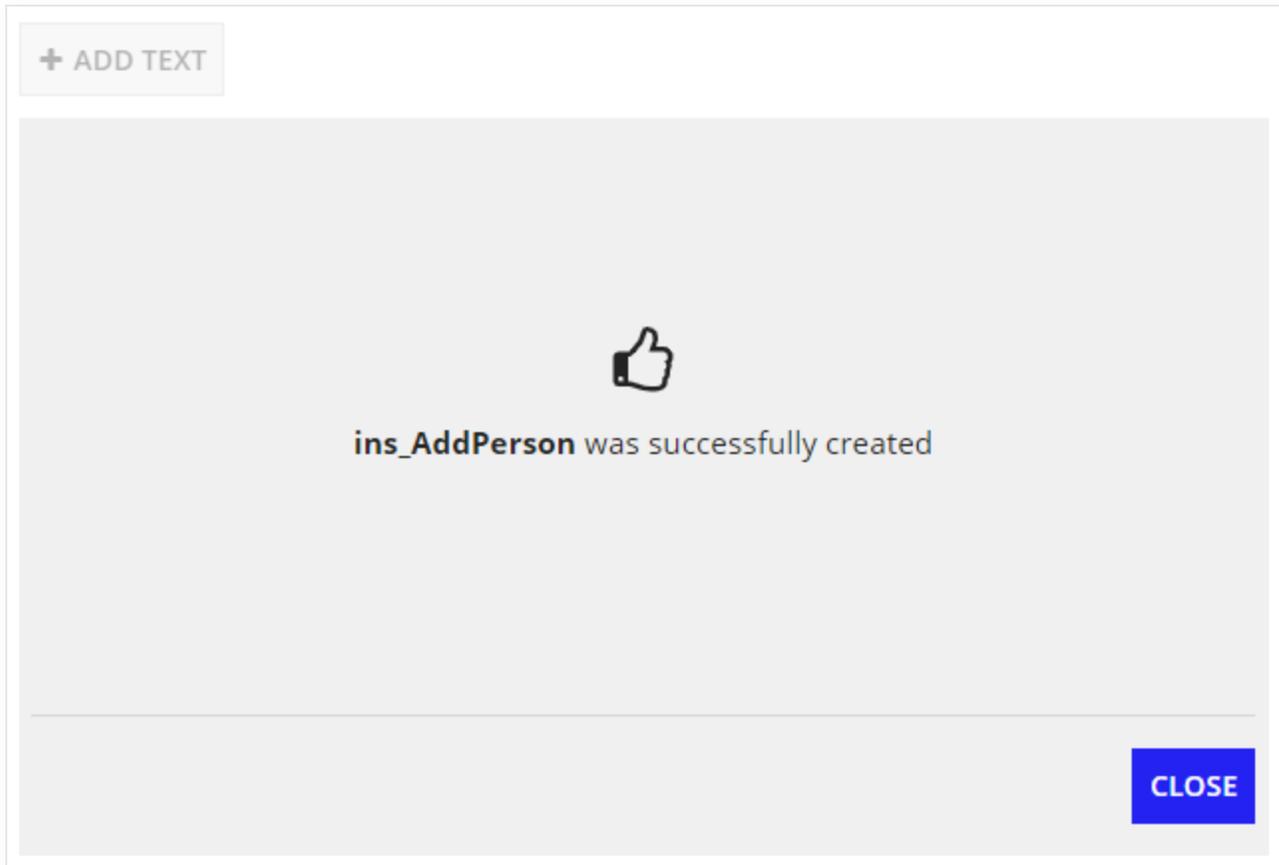
Reverting text to default

There may be times when you want to change text back to its default value. Click into the text card of the edited text that you want to revert.

Click **REVERT TO DEFAULT** and confirm that you would like to make the change. This action cannot be undone, though you can always edit the text again if desired.

Deleting custom text

There may be times when you no longer need the custom text that you added to the solution. Maybe the solution's latest version now ships with a feature that covers the use case of a customized report.

In these instances, you can delete custom text by clicking into a custom text card.

Click **DELETE** and confirm that you would like to delete the text. This action cannot be undone.
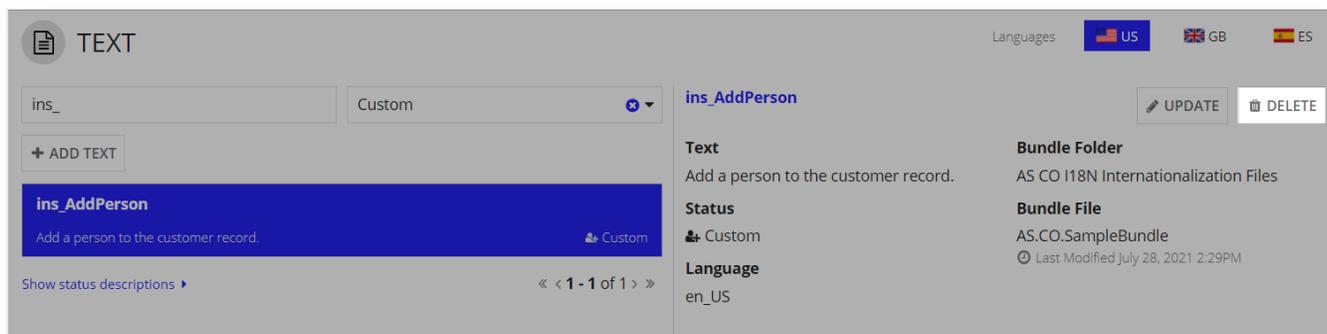
It is important to know that deleting custom text does not mean that any customized functionality in which the text is used is also deleted. Be sure you delete or remove access to any customized front-end reports, records, or sites if you intend to fully restrict access to a former customization.

Working with Arguments

In `[%1] is currently closed`, `[%1]` is an argument. When working with arguments, keep the following in mind:

- If the default label does not have arguments, your custom label can not have arguments.
- If the default label does have arguments, your custom label can have arguments, but does not have to.
    - Your custom label cannot use different arguments and cannot use more arguments than the default label.
- Make sure the syntax of the translated value stays the same as the default. For example, use [%1], not ###1### or {1}.

Images

You may want to modify the images that ship with your solution to fit your corporate brand. Image customization involves uploading new images via the Solutions Hub. Image customizations replace the default images that shipped with your solution. These changes persist even on solution upgrades.

To perform an image customization, navigate to **CONFIGURE & CUSTOMIZE –> IMAGES**. The Images section displays all of the default images that shipped with the solution and are available for customization.
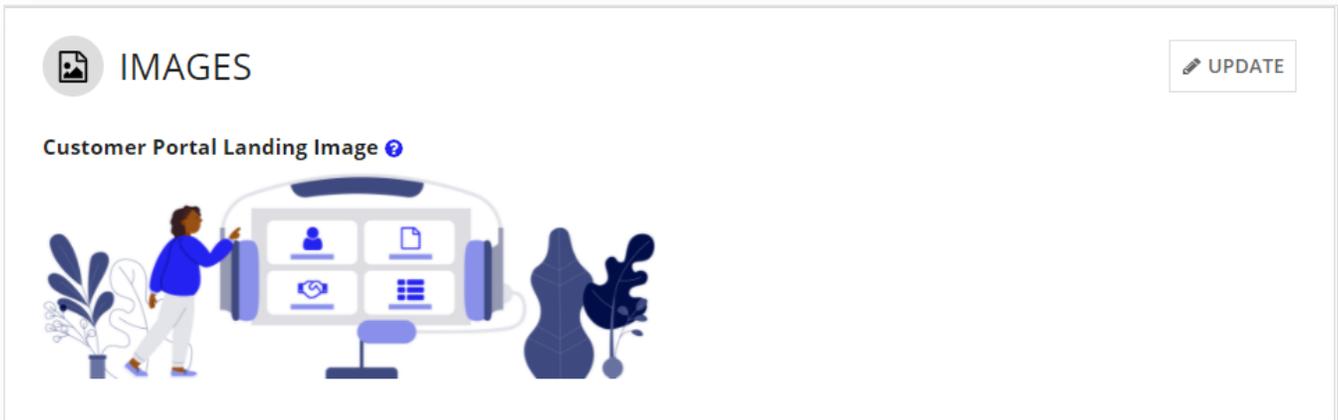
When you click **UPDATE**, the UPDATE IMAGES dialog appears with the current file for each image. Hover over the image you want to replace, and click **X** to remove the current file.
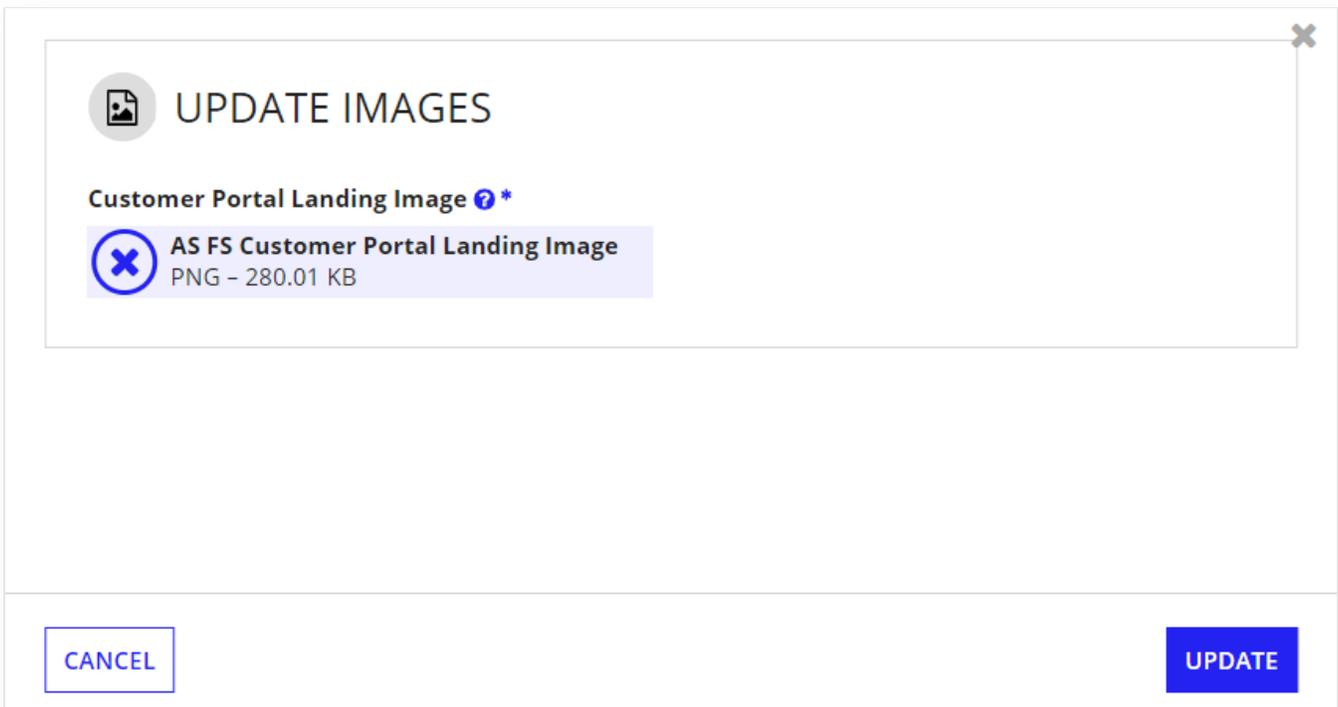
Then, simply upload a new image. Newly uploaded images must be the same file type as the original image.

Once you are finished making changes, click **UPDATE**. Any modifications to images you made will persist, even if upgrading to a new version of the solution.

Business Logic

Business logic is a functional customization that includes any customization templates that have been exposed by the solution's product engineers to allow you to:

- Adjust conditional content
- Modify data loads
- Adjust static values
- Modify a logical expression

See Functional Customizations for guidance on how to perform, edit, or revert a business logic customization.

Acquisition Weekly Sync Schedule

The Acquisition Weekly Sync Schedule customization allows you to configure the scheduling of the FAR sync process. Modify this rule to change the frequency or time at which the process runs.

Acquisition Weekly Sync Schedule   `Customized`

This rule represents the scheduling configuration of the FAR sync process. Modify this rule to change the frequency or time at which the process runs.

✏ EDIT   ↺ REVERT TO DEFAULT

Click **EDIT** to view detailed instructions on how to customize the frequency or time of your weekly sync and **REVERT TO DEFAULT** to revert the sync schedule to its default behavior.

Functional customizations

This section outlines the methodology for performing, editing, and reverting functional customizations.

Performing a customization

To perform a customization, find the supported customization template that best matches your customization use case. Navigate to **CONFIGURE & CUSTOMIZE –> FUNCTIONALITY** within the context of the solution you want to customize.

The title and description of the supported customization template provide contextual clues as to where in the solution the customization occurs.

For example, let's say you want to customize your solution's landing page so that it includes a link to custom content. On the existing landing page, shown below, you want to add a new "Training" link.
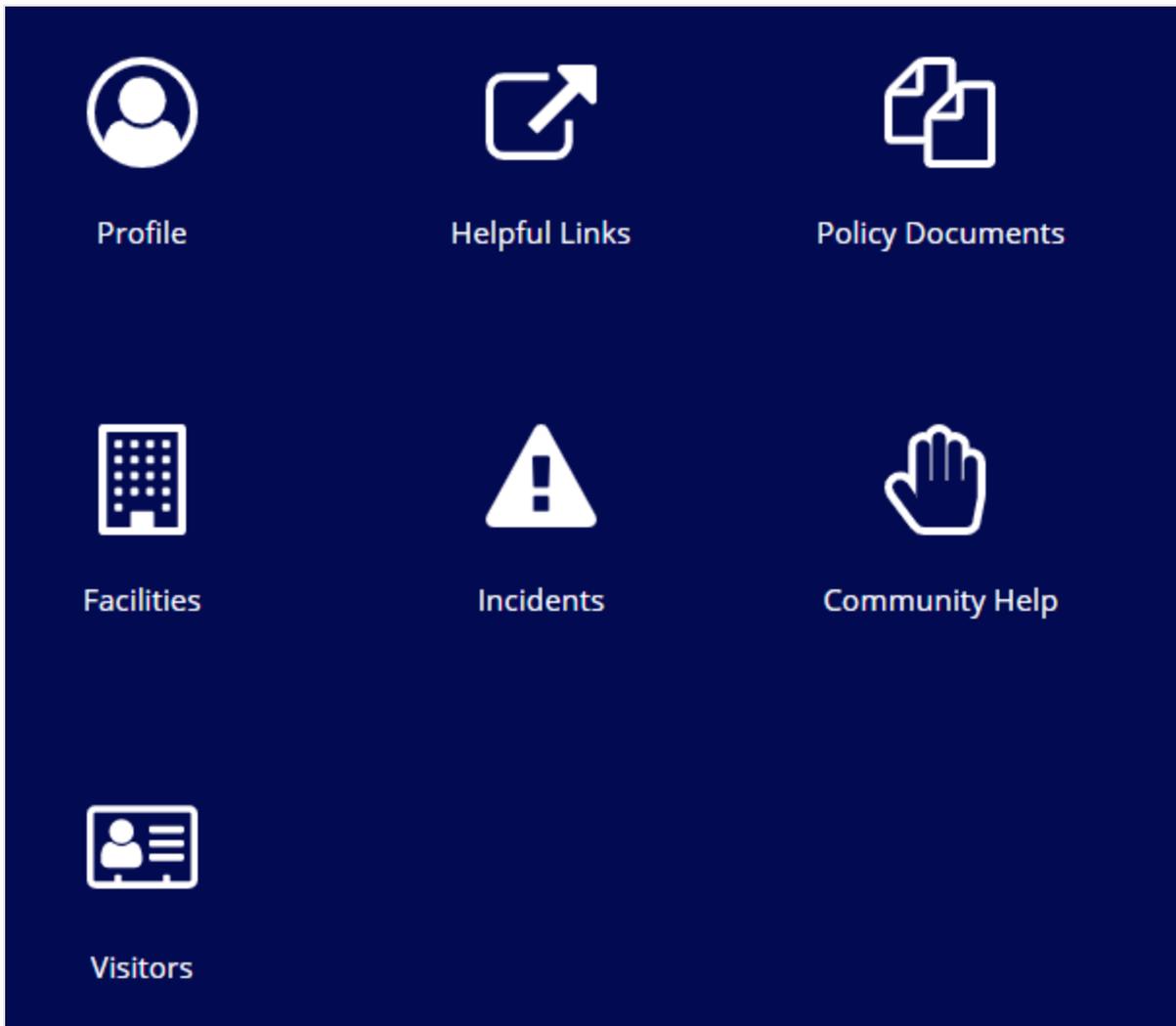
After searching the available customization templates, and finding the template you want to customize, click **CUSTOMIZE**.

Home Page Quick Links

Renders quick link cards at the bottom of the Home Page, one quick link card for each configuration. Custom quick link cards are rendered after the quick link cards that are standard with the application.

🎁 Default version

✏ CUSTOMIZE

A confirmation dialog appears, indicating that a new object will be created on the backend. Click **YES**.

Are you sure?

A new rule will be created with the suffix "_custom". This rule will execute in lieu of the "_default" rule.

NO	YES

When the customization template state refreshes, as shown below, click **EDIT** to begin customizing.

Home Page Quick Links

Renders quick link cards at the bottom of the Home Page, one quick link card for each configuration. Custom quick link cards are rendered after the quick link cards that are standard with the application.

Custom version

✏ EDIT	↺ REVERT TO DEFAULT

A new tab opens in Appian Designer that allows you to begin customizing the code. You'll see detailed how-to instructions on performing the customization within the commented code.

```
ITA_HomePageQuickLinks_v1_custom

2
3   DESCRIPTION: Renders a custom quick link card at the bottom of the Home Page for each item in the a
4   Custom quick link cards display after the quick link cards that ship with the solution.
5
6   DEFAULT BEHAVIOR: This rule contains no custom quick links by default. Quick links that ship with t
7
8   CUSTOMIZATION STEPS: For each custom quick link card you'd like to display on the Home Page, includ
9   Use the commented Quick Link Template to configure a custom quick link.
10
11
12  PARAMETERS:
13
14  generalBundle: A dictionary of key-value pairs for front-end labels. Custom labels can be
15  added following the Custom Bundle documentation:
16  https://community.appian.com/w/the-appian-playbook/2228/workforce-safety-v8-1-custom-bundle-file-cc
17
18
19  EXPECTED RETURN TYPE: Map?list
20
21  */
```

You'll see the modifiable code block with a defined example commented out.

```
23 ▾ cast(
24 ▾   'type!{http://www.appian.com/ae/types/2009}Map?list',
25 ▾   {
26
27 ▾     /*Quick Link Template - sample configuration:*/
28
29 ▾     /*a!map(*/
30 ▾        /*label: "My Link Label",*/
31 ▾        /*icon: "icon",*/
32 ▾        /*showWhen: true,*/
33 ▾        /*link: a!safeLink(uri: "https://www.google.com")*/
34 ▾     /*),*/
35
36 ▾     /*Note, the link parameter can return one of: */
37 ▾        /*a!documentDownloadLink()*/
38 ▾        /*a!processTaskLink() */
39 ▾        /*a!recordLink() */
40 ▾        /*a!reportLink() */
41 ▾        /*a!safeLink()*/
42 ▾        /*a!startProcessLink()*/
43 ▾        /*a!userRecordLink()*/
44
45 ▾     /*Add 0, 1, or multiple links to this array*/
46     }
47   )
```

Use the detailed steps and example to perform your customization. When you are finished, save your changes.

View the example below to see how we customized a new "Training" link to the landing page.

```
cast(
  'type!{http://www.appian.com/ae/types/2009}Map?list',
  {
    a!map(
      label: "Training",
      icon: "graduation-cap",
      showWhen: true,
      link: a!safeLink(uri: "https://www.appian.com/university")
    )

    /*Quick Link Template - sample configuration:*/

    /*a!map(*/
      /*label: "My Link Label",*/
      /*icon: "icon",*/
      /*showWhen: true,*/
      /*link: a!safeLink(uri: "https://www.google.com")*/
    /*),*/
```

Finally, navigate to the area in your solution where you expect the customization to appear and verify the results. In our example, we can see that the new "Training" link was successfully added to the landing page. When the user clicks the link, they are redirected to the URL we specified in the customization.
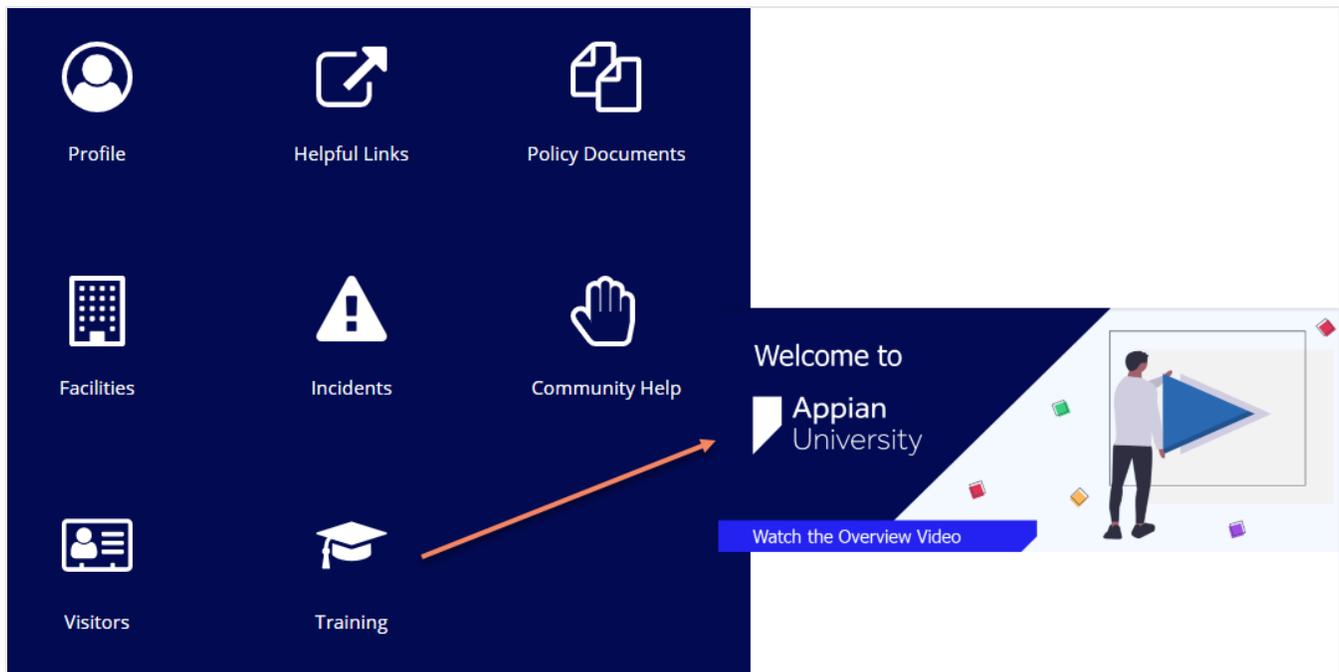
Congratulations, you have successfully customized your solution. Your changes will persist when you upgrade to a new solution version!

Editing a customization

Maybe your business requirements have changed and you need to tweak the functionality of your supported customization. To edit a customization, simply navigate to the customization

template, and click **EDIT**.

The template will open in a new tab in Appian Designer where you can view the latest saved version of your customization.

Make the required changes and save the modified objects. Verify the intended results are displayed in the frontend of your solution.

Don't forget to deploy your customizations when finished!

Reverting a customization

If you find that the latest version of an out-of-the-box feature in the latest solution release addresses your customization use case, you may want to adopt the new feature and revert your customization back to the default behavior.

Navigate to the appropriate customization template and click **REVERT TO DEFAULT**.

After understanding the impacts of this type of customization change, click **YES** on the confirmation dialog. The default out-of-the-box solution behavior will overwrite your customization so that it is no longer present in the solution.

Deploying customizations

To deploy your customizations to a higher environment, click the **DEPLOYMENT** tab under the solution you want to deploy.

Answer the series of questions to dynamically generate the required deployment steps on-screen. Follow the steps shown to deploy your solution to a higher environment.

Below is an example of answering these questions and the rendered deployment steps:

Creating a Clause Set

Introduction

Clause selection is the process of selecting and editing a group of clauses, also called a clause set, needed to create a clause supplemental document. The Appian Government Clause Automation (GCA) solution walks users through a guided experience that allows them to collect

contract information and answer additional questions so the solution can automatically suggest clauses needed for the contract.

This page provides instructions on creating a new clause set.

Creating a clause set

Creating a clause set consists of the following steps:

1. Provide details
2. Answer questionnaire
3. Review clauses
4. Add Clauses
5. Generation Complete

Provide details

Creating a clause set begins with providing contract details.

Basic information

To start creating a clause set:

1. Select the **Type**, either `Soliciation` or `Award`.
2. Select the **Category**, `New` or `Amendment`.
   - The category options depend on the **Type** you selected in the previous step.
3. Enter the **Soliciation / Award ID**.
4. Enter the **Modification / Amendment Number** if the **Category** previously selected was not `New`.
5. Select the **Contracting Officer**.
6. Select the **Contract Specialist**.

Configuration

1. Select whether this is an action off an existing vehicle.
2. Select a **Template**.
   - Templates are created from the Templates page. The template you select affects which clauses are added to the clause set.

Contract details

This section is only relevant and available for new solicitation or awards that are not an action off an existing vehicle.

To enter additional contract details for a new award:

1. Select the **Contract Purpose**, either `Commercial` or `Non Commercial`.
2. Select the **Contract Purpose Type**.
   - The Contract Purpose Type options available depend on the **Contract Purpose** you selected in the previous step.
3. Enter the **Contract Purpose Detail**.
4. Select the **Pricing Type**.
5. Select the **Contract Method**.

6. Click **NEXT** to proceed.

Answer questionnaire

GCA allows you to have multiple questionnaires for your agency. When creating a new clause set, only the questionnaire selected as the default will appear.

Each questionnaire can have multiple categories and multiple questions in each category. In order to complete a questionnaire, users must answer all of the questions in each category.

Click **NEXT** to proceed.

Review clauses

Here you can review the clauses that have been automatically added as a result of contract details, rules, selected template, and answered questionnaire.

Users can search the clause list for a specific clause or filter the clause list by Usage, Type, or Source.

- **Usage**: `Applicable`, `Optional`, or `Required`.
- **Type**: `Clause or Provision`.
- **Source**: `FAR`, `Department`, or `Agency`.

To proceed to the step, click **NEXT**.

Add clauses

As an option, you can manually add clauses that were not automatically added. You can search the clause list to find a specific clause and filter the list by **Usage**, **Type**, or **Source**. Select any additional clauses you would like to add, and click **GENERATE**.

Suggested Clauses

Following clauses are suggested based on the contract details

0 suggested clauses selected

| Search Clauses | --- Any Usage --- ▾ | --- Any Type --- ▾ | --- Any Source --- ▾ |

	Clause	↑ Usage	Section
☐	52.203-16	Preventing Personal Conflicts of Interest. *Clause • FAR • 20*	Applicable	I
☐	52.203-19	Prohibition on Requiring Certain Internal Confidentiality Agreements or Statements. *Clause • FAR*	Applicable	I
☐	52.203-1999	Prohibition on Requiring Certain Internal Confidentiality Agreements or Statements. *Clause • FAR • 20 july 2021*	Applicable	I
☐	52.203-3	Gratuities. *Clause • FAR • July 30*	Applicable	I
☐	52.203-8	CCancellation, Rescission, and Recovery of Funds for Illegal or Improper Activity. *Clause • FAR • 20 june 2021*	Applicable	I

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Additional Clauses

Following clauses are available from the clause catalog and don't have any suggested usage

0 additional clauses selected

| Search Clauses | --- Any Type --- ▾ | --- Any Source --- ▾ |

	Clause	↑ Section
☐	52.247-20	Estimated Quantities or Weights for Evaluation of Offers. *Provision • FAR*	M
☐	52.247-4	Inspection of Shipping and Receiving Facilities. *Provision • FAR*	L
☐	52.247-45	F.o.b. Origin and/or F.o.b. Destination Evaluation. *Provision • FAR*	L
☐	52.247-46	Shipping Point(s) Used in Evaluation of F.o.b. Origin Offers. *Provision • FAR*	L
☐	52.247-47	Evaluation-F.o.b. Origin. *Provision • FAR*	M

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BACK   CANCEL   SAVE AND CLOSE   GENERATE

Generation complete

After clicking **GENERATE** on the **Add Clauses** page, you'll be brought to a page that confirms that generation was successful. You will also see a link to the summary record page for your clause set.

Create Clause Set

| ✔ PROVIDE DETAILS | ✔ ANSWER QUESTIONNAIRE | ✔ REVIEW CLAUSES | ✔ ADD CLAUSES | ⟳ GENERATION COMPLETE |

👍

Clause set is generated and clauses have been added to it.
If you don't see your updates immediately, refresh your clause set summary page as the process is still running in the background.
View Clause Set ⬈

And that's it! You've finished creating a clause set.

Clause Automation Home Page Overview

Introduction

The Government Clause Automation (GCA) Home page is the primary page user will use to setup evaluations, complete tasks, and track evaluation progress. For contracting personnel, it is an invaluable tool to keep track of evaluations at a high-level and identify issues. For other users, it is their home for keeping on top of their evaluation work.

The Home page for contracting personnel and other users will display slightly different information. This following page provides an overview of the Home page and describes the differences between the type of information each user will see.

Who sees what?

Contracting personnel:

- Evaluations assigned to them
- Evaluation tasks associated with their evaluations
- Overall evaluation status
- Progress by criteria
- Progress by evaluation phase
- Progress of each evaluator

All other users:

- Evaluations tasks assigned to them
- Their evaluation status
- Progress by evaluation phase
- Their progress by factor

Evaluations

The user can easily see the evaluations they are involved in the top banner.

Evaluation visibility

Contracting personnel can view the evaluations they created or are associated to as a member of the contracting team. All other users can view the evaluations they are assigned as a member of the evaluation team.

Approach Tasks

Users can perform the following actions from the checklist items list by clicking on a single checklist item or bulk items:

- Edit the due date for a checklist item or bulk items.
- Change the status for a single checklist item or bulk items to **MARK NOT NEEDED** or **CLAIM ITEM**.
- Reassign a single checklist item or bulk items by selecting the checklist items, entering a username into the **Reassign To box**, then clicking **REASSIGN**.

Approach tasks visibility

Contracting personnel:

- Tasks assigned to them
- Tasks associated to their evaluations

All other users:

- Tasks assigned to them

Create a new evaluation

You can add a new evaluation directly from the Home page by clicking **Create new evaluation**.

New evaluation action visibility

By default, only members of the `Contracting Officer` and `Contract Specialist` groups see the **Create new evaluation** action.

Configuring Questionnaires

Introduction

The process for managing the clauses and provisions required for a contract can be labor-intensive, and error-prone. With Government Clause Automation, users can automate this process by providing contract details and completing a contract questionnaire. After completing the questionnaire, GCA uses the contract details and questionnaire answers to recommend clauses to include in the contract.

Through the Clause Automation site, business users can view, add, and edit questionnaires, including the questions and rules associated with each questionnaire, that suggest clauses to add to their contracts.

This page describes how to use the Clause Automation site to configure approaches.

Viewing questionnaires

On the Clause Automation site, a grid lists all of the information that is pertinent to questionnaires. Users can use this information to determine which questionnaires already exist and when their last update occurred.

After you access the Clause Automation site, you can view the Questionnaires page by selecting **Questionnaire** at the top of the page. When you click **Questionnaires**, you will see three tabs: **Questionnaires**, **Questions**, and **Rules**.

When you select the Questionnaire tab, a list of existing questionnaires and a timestamp showing when each question was last modified displays. You can also create a new questionnaire from this view.

Managing questionnaires

Along with the grid of existing questionnaires, you will also see actions that you can take against a questionnaire from the Questionnaires tab. From this page, you can create a new questionnaire, delete a questionnaire, clone a questionnaire, and set a questionnaire as the default that will automatically appear for users when they're creating clause sets. You can also edit a questionnaire by clicking on it.
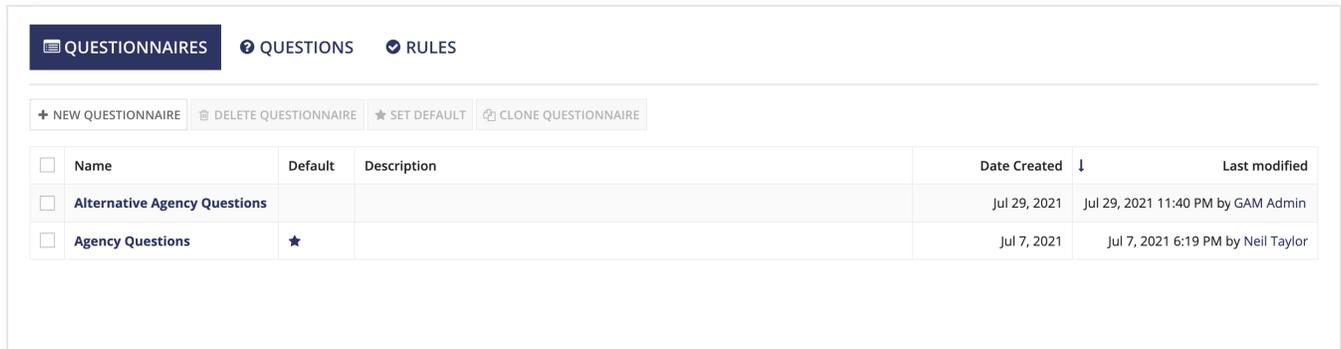
Creating a new questionnaire

To create a new questionnaire:

1. From the **Questionnaires** page, click **NEW QUESTIONNAIRE**.
2. Enter a questionnaire **Name** and **Description**.
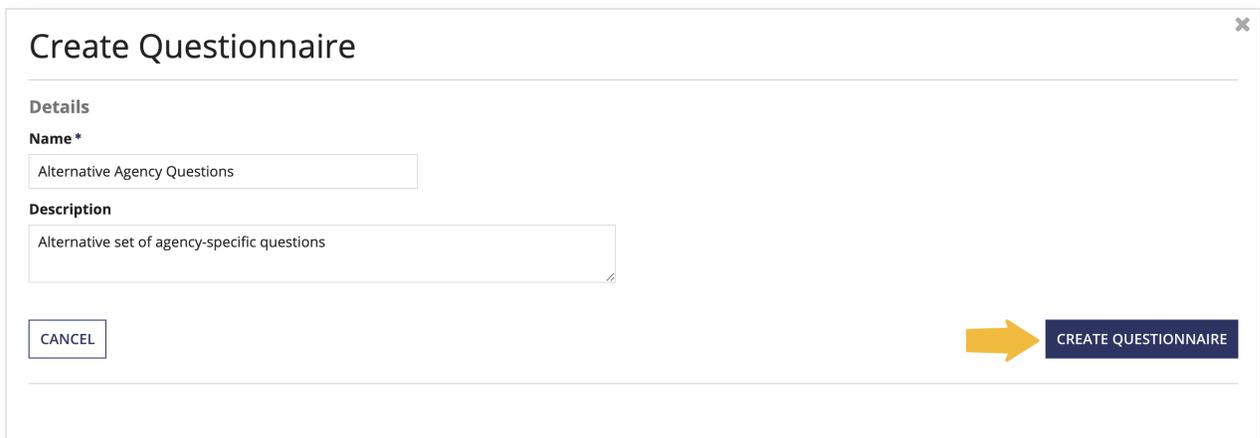
3. Click **CREATE QUESTIONNAIRE**.
4. Select **ADD CATEGORY** to add a question category.

Alternative Agency Questions

Details

Name	Alternative Agency Questions	
Description	Alternative set of agency-specific questions	

Question Categories

+ ADD CATEGORY	

...on	Response Type	Choices
	No items available	

5. Enter a **Category Name** and select **CREATE CATEGORY**.

Create Category ✕

Category Name *

Default

CANCEL   **CREATE CATEGORY**

6. You can continue adding categories to the questionnaire, or use **UPDATE CATEGORY** and **DELETE CATEGORY** to make changes to the selected category.

7. Click **ADD QUESTION** to add questions to the categories you created.
   - **Note:** The Add Question grid contains all of your configured questions.

8. Use the Search field to look for a specific question in the grid. After the identifying the question you want to add, simply click on it to add it to the category.
   - **Note**: If you can't find the question you're looking for, see Creating a new question below to add a question.

Add Question ✖

Select a Question

| Search for a question to add... | 🔍 SEARCH |

Question Text	Response Type	Choices
What is GCM?	Radio Button	• Government Clause Management • General Claim Management
Does this contract have options?	Radio Button	• Yes • No
Are you buying IT Hardware?	Radio Button	• Yes • No

Configure Visibility

◉ This is a standalone question that is always shown
○ This is a follow-up question that is shown based on the answer to a previous question

| CANCEL | | ADD QUESTION |

9. Once you have selected the desired question, click **ADD QUESTION** to include it in the questionnaire.
10. Repeat steps 7-9 until the questionnaire contains all the questions you need.
11. Click **PREVIEW QUESTIONNAIRE** to see what the questionnaire will look like to users.

Preview for Questionnaire Template "Alternative Agency Questions" ✖

Default

| 0% |

Default ❯

Does this contract have options?
○ Yes
○ No

Are you buying IT Hardware?
○ Yes
○ No

CLOSE

12. After confirming the questionnaire is set up correctly, select **CLOSE** to finish creating it.

Updating an existing questionnaire

With the Clause Automation site, you can easily update questionnaires.

To update a questionnaire:

1. From the **Questionnaires** page, click on the questionnaire you want to edit.
2. Select **Edit Details** to update the questionnaire **Name** and **Description**.

3. After the **Name** and **Description** have been changed, click on **SAVE** to return to the questionnaire summary page.
4. Select **ADD CATEGORY** to add a question category.

5. Enter a **Category Name** and select **CREATE CATEGORY**.

Create Category

Category Name *

Default

CANCEL   **CREATE CATEGORY**

6. Use **UPDATE CATEGORY** and **DELETE CATEGORY** to make changes to the existing categories.

Alternative Agency Questions

Details   ✎ EDIT DETAILS

Name   Alternative Agency Questions

Description   Alternative set of agency-specific questions

Question Categories   **Default**   🔧 UPDATE CATEGORY   🗑 DELETE CATEGORY

| Default |
| ➕ ADD QUESTION |

☐	Question	Response Type	Choices
	No items available		

➕ ADD CATEGORY

7. Click **ADD QUESTION** to add questions to the categories you created.

Alternative Agency Questions

Details   `✎ EDIT DETAILS`

       Name   Alternative Agency Questions

    Description   Alternative set of agency-specific questions

Question Categories

Default
+ ADD CATEGORY

Default   `✎ UPDATE CATEGORY` `🗑 DELETE CATEGORY`

+ ADD QUESTION ⬅

☐	Question	Response Type	Choices
	No items available		

8. The Add Question grid contains all of your configured questions. Use the **Search** field to look for a specific question in the grid. After the identifying the question you want to add, simply click on it to add it to the category.
   - **Note**: If you can't find the question you're looking for, see Creating a new question to add a question.

Add Question ✖

Select a Question

`Search for a question to add...` `🔍 SEARCH`

Question Text	Response Type	Choices
What is GCM?	Radio Button	• Government Clause Management • General Claim Management
Does this contract have options?	Radio Button	• Yes • No
Are you buying IT Hardware?	Radio Button	• Yes • No

Configure Visibility

◉ This is a standalone question that is always shown
○ This is a follow-up question that is shown based on the answer to a previous question

`CANCEL`   `ADD QUESTION`

9. After selecting the desired question, click **ADD QUESTION** to include it in the questionnaire.
10. To edit or remove a question, select the question and use **UPDATE QUESTION** and **DELETE QUESTION**.
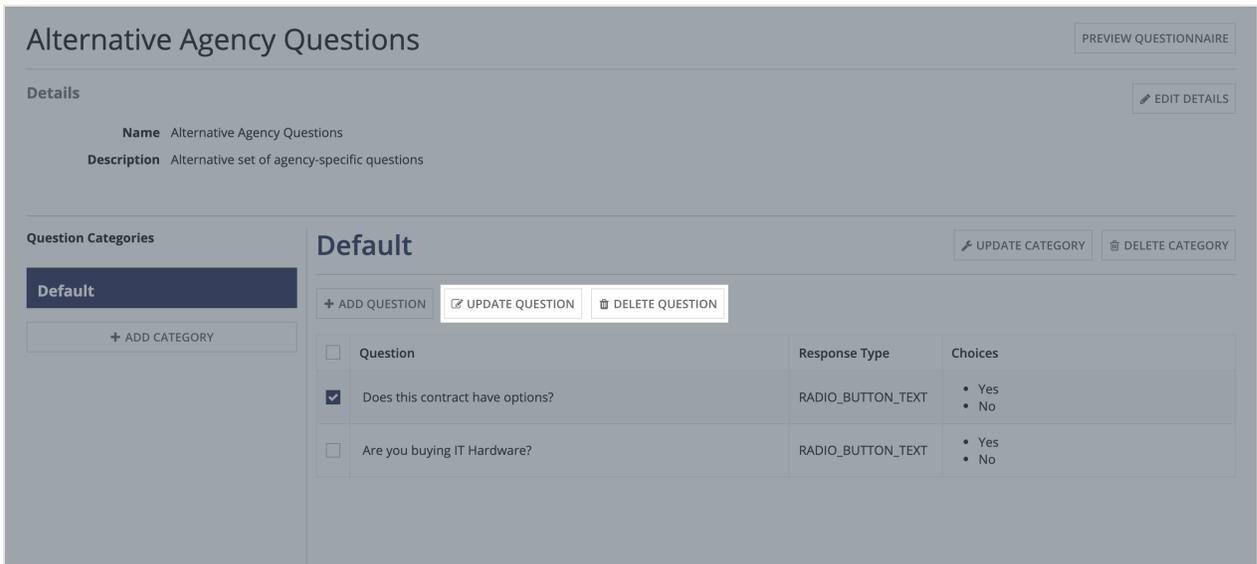
11. Click **PREVIEW QUESTIONNAIRE** to see what the questionnaire will look like to users.
12. After confirming the questionnaire is set up correctly, select **CLOSE** to finish creating it.

All future questionnaires will display the latest updated version. Questionnaires that have already been completed will not be affected.

Viewing questions

After accessing the Clause Automation site, you can view the questionnaires by selecting the **QUESTIONNAIRES** page at the top of the UI. From here, you'll have access to three unique tabs: **Questionnaires**, **Questions**, and **Rules**."

When you select the **Questions** tab, a list of existing questions, each question type, and a timestamp showing when each question was last modified displays. You can also create a new question from this view.

Managing questions

You can filter the list of questions by question type using the dropdown list and radio buttons. You can also search the list for a specific question. Click **NEW QUESTION** when you want to create a new question and click **IMPORT QUESTIONS** to add multiple questions at once from an Excel file. Click the **trash can** 🗑 icon to delete a question."

Question types

There are two types of questions in Clause Automation:

1. **Dropdown:** Users can select multiple answers.
   - **Note:** You can configure the maximum number of answers that can be selected.

Type *		Response Options	
Dropdown ▾		car	🗑
Max Selections ❓		truck	🗑
2		van	🗑
		bus	🗑
		⊕ Add Option	

2. **Radio Button:** Users can only select one answer.

Type *		Response Options	
Radio Button ▾		car	🗑
		truck	🗑
		van	🗑
		⊕ Add Option	

Creating a new question

To create a new question:

1. From the **Questions** page, click **NEW QUESTION**.

🗐 QUESTIONNAIRES	❓ QUESTIONS	✅ RULES			
➕ NEW QUESTION ⬅ UESTIONS			--- All --- ▾	Search for a question	🔍 SEARCH
Question		**Response Type**	**Last modified**		↓
Are you buying IT Hardware?		Radio Button	Jul 7, 2021 6:18 PM by GAM Admin		🗑
Does this contract have options?		Radio Button	Jul 7, 2021 6:17 PM by Neil Taylor		🗑
What is GCM?		Radio Button	Apr 12, 2021 7:53 AM by GAM Admin		🗑

2. Enter the **Question Text** and select a question **Type**.
   - **Note:** See Question types for information on the different question types.

3. In **Response Options**, add your responses.
   - Click **Add Option** to add another response option. You can delete a response option by selecting the **trash can** 🗑 icon.
4. For dropdown question types, enter the maximum number of options a user can select in **Max Selections**.

Updating an existing questionnaire

You can easily update questions with the Clause Automation site.

1. From the **Questions** page, click the question you want to update.

2. Enter new text in **Question Text** to update the question text or select a different question using **Type**.

- **Note:** See Question types for information on the different question types.
3. In **Response Options**, update the desired response options.
    - Click **Add Option** to add another response option. Click the **trash can** 🗑 icon to delete a response option.
4. For dropdown question types, update the maximum number of options a user can select in **Max Selections**.
5. Click **CREATE QUESTION** to finalize and save your updates.

Any questionnaire that contains the updated question will display the latest version of the question.

Viewing rules

After you access the Clause Automation site, you can view the Rules page by selecting **QUESTIONNAIRE>Rules** the top of the page.

When you select **Rules**, a list of the existing rules; their corresponding questionnaire and category; and the time they were last modified will appear. You can also create a new rule from this page.

Managing rules

You can search the rules list for a specific rule or filter the list to identify rules associated with a specific questionnaire, status, or both. You can also export the rules list to an Excel file by clicking on the **download** ⬇ icon.
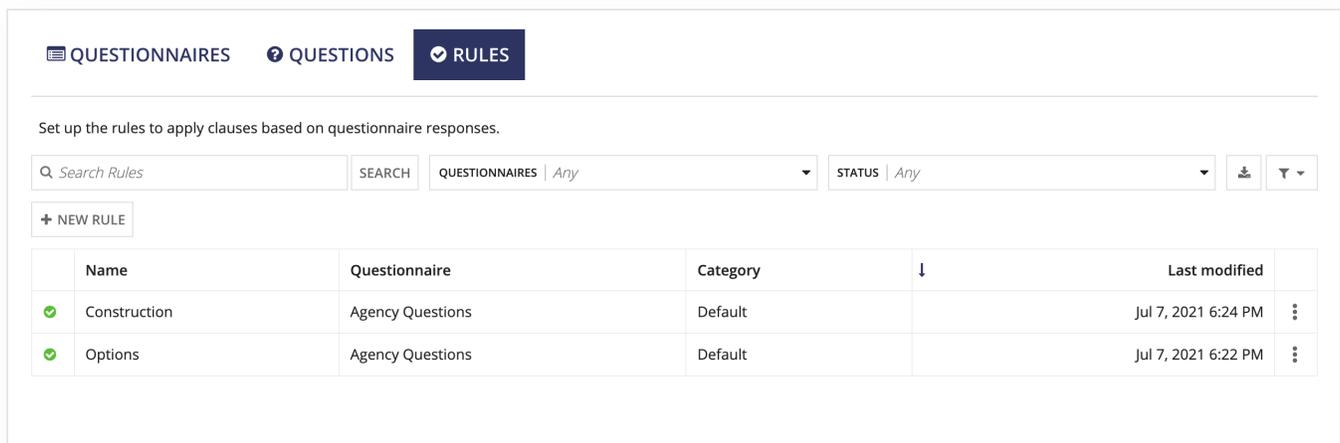
Creating a new rule

To create a new rule:

1. From the **Rules** page, click **NEW RULE**.

2. Enter the rule **Name** and select the **Status**.
    - **Note:** There are two statuses:
        - **Active:** The rule will be applied to its corresponding questionnaire.
        - **Inactive:** The rule will not be applied to its corresponding questionnaire.

3. Select the **Questionnaire** for which this rule will apply.
4. Select the **Category** for the rule.
5. In the **Conditions** section, select a **Question**, **Operator**, and **Response Option** to apply the rule to.
    - Select **Add Condition** to apply the rule to another question and response set.
6. Click **NEXT** when you are ready to assign clauses to the rule.
7. In the **Available Clauses** section, click the **checkbox** ☐ next to each clause you want to attach to the rule.
    - Easily search the clause list for a specific clause or filter by clause or provision **Type**, clause **Source**, or both.

1. After selecting the desired clauses, click the **right arrow ➜** to move them to the **Selected Clauses** section.
   - To remove one or more clauses from **Select Clauses**, click the **checkbox ☐** next to each clause you want to remove and click the **left arrow ⬅** icon.

2. Click **SAVE** to create the rule.

Updating an existing rule

You can quickly and easily update rules with Clause Automation.

To edit an existing rule:

1. From the **Rules** page, click the ⋮ icon at the left of your desired rule and select the **Edit Rule** action.
2. If desired, enter a new rule **Name** and select a new **Status**.

3. Select a different **Questionnaire** for which this rule will apply.
4. Select a different **Category** for the rule.
5. In the **Conditions** section, select a **Question**, **Operator**, and **Response Option** for the rule.
   ○ Select **Add Condition** to apply the rule to another question and response set.
6. Click **NEXT** when you are ready to assign clauses to the rule.
7. In the Available Clauses section, you will see a list of all clauses in Clause Automation. Click the checkbox to the right of each clause you want associated with the rule.
   ○ You can search for a specific clause, filter by **Type** (Clause or Provision), and filter by **Source** (FAR, Department, or Agency).

8. After you have selected your desired clauses, click the right arrow to move them to the Selected Clause section.

Available Clauses
Select the clauses to associate with the rule

Q Search Clauses	SEARCH	TYPE | Any ▾	▾

SOURCE \| Any ▾

☐ **Clause**

☐ 52.223-22 | Public Disclosure of Greenhouse Gas Emissions and Reduction Goals-Representation.
Provision • FAR •

☐ 52.222-32 | Construction Wage Rate Requirements-Price Adjustment (Actual Method).
Clause • FAR •

☐ 52.222-31 | Construction Wage Rate Requirements-Price Adjustment (Percentage Method).
Clause • FAR •

☐ 52.222-30 | Construction Wage Rate Requirements-Price Adjustment (None or Separately Specified Method).
Clause • FAR •

☐ 52.203-2 | Certificate of Independent Price Determination.
Provision • FAR • tomorrow

☐ 52.203-3 | Gratuities.
Clause • FAR • July 30

52.225-19 | Contractor Personnel in a Designated Operational Area or Supporting a

Selected Clauses
Following clauses will be associated with the rule

Q Search Clauses	SEARCH	TYPE | Any ▾	▾

SOURCE \| Any ▾

☐ **Clause**

☐ 52.223-22 | Public Disclosure of Greenhouse Gas Emissions and Reduction Goals-Representation.
Provision • FAR •

☐ 52.203-2 | Certificate of Independent Price Determination.
Provision • FAR • tomorrow

> <

CANCEL   SAVE

9. Remove clauses from Selected Clauses, by selecting them and clicking the left arrow.
10. When you have added the desired clauses, click **SAVE** to update the rule.

All future evaluations will use the modified approach. Evaluations that are already in approach or completed will not be affected.

Configuring Templates

Introduction

Similar clause sets may contain significant overlap in the clauses they use. It is much easier for users to identify and re-use these overlapping clauses than to create each clause set from scratch. This is where templates come into play.

Through the Government Clause Automation site, business users can view, add, and edit templates containing pre-configured groups of clauses that can be added to clause sets.

This page describes how to use the Clause Automation site to configure templates.

Viewing templates

On the Clause Automation site, a grid lists all of the information that is pertinent to templates. Users can use this information to determine which templates already exist and when they were last updated.

After you access the Clause Automation site, you can view the Templates tab by selecting **Templates** at the top of the page.

When you click **Templates**, a list of the existing templates display. You can search this list for a particular template. You can also filter the list of templates by active or inactive templates. Clicking the download icon will export the current list of templates as an Excel file.

Clicking on the dotted icon to the left of each template will display the **Edit Template** action. Selecting that action will allow you to update an existing template.

See the Creating a new template section for more details on adding templates.

Creating a new template

To create a new template:

1. From the **Templates** page, click **CREATE TEMPLATE**.

2. Enter a **Template Name** and **Description**.
3. Set the template's **Status** as **Active** or **Inactive**.
   - **Active**: Users can select the template when creating a clause set.
   - **Inactive:** Users cannot select the template when creating a clause set.

Create Template

Template Name *

Status *
○ Active ○ Inactive

Description

Clause Catalog
Select the clauses to include in the template

Search Clauses — Select a Source — — Select a Clause Type —

ADD TO TEMPLATE

		Clause	Source	Type	Effective Date
☐	✓	52.229-12 | on Certain Foreign Procurements.	FAR	Clause	-
☐	✓	52.229-11 | on Certain Foreign Procurements—Notice and Representation.	FAR	Provision	-
☐	✓	52.219-33 | Nonmanufacturer Rule.	FAR	Clause	-
☐	✓	52.219-32 | Orders Issued Directly Under Small Business Reserves	FAR	Clause	-
☐	✓	52.219-31 | Notice of Small Business Reserve.	FAR	Provision	-
☐	✓	52.246-26 | Reporting Nonconforming Items.	FAR	Clause	-
☐	✓	52.204-26 | Covered Telecommunications Equipment or Services Representation.	FAR	Provision	-

Included Clauses
Following clauses are included in the template

Search Clauses — Select a Source — — Select a Clause Type —

REMOVE FROM TEMPLATE

	Clause	Source	Type	Effective Date
	No clauses available			

CANCEL   CREATE

4. From the **Clause Catalog**, click the **checkbox** ☐ next to each clause that you want to add to the template.
   - You can search for a specific clause or filter by **Source** and **Clause Type**.

Create Template

Clause Catalog
Select the clauses to include in the template

construction   FAR   ⊗ ▾   Clause ▾

ADD TO TEMPLATE

		Clause	Source	Type	Effective Date
☐	✓	52.249-10 | Default (Fixed-Price Construction).	FAR	Clause	-
☐	✓	52.248-3 | Value Engineering-Construction.	FAR	Clause	-
☐	✓	52.246-21 | Warranty of Construction.	FAR	Clause	-
☐	✓	52.236-26 | Preconstruction Conference.	FAR	Clause	-
☑	✓	52.236-21 | Specifications and Drawings for Construction.	FAR	Clause	-
☐	✓	52.236-18 | Work Oversight in Cost-Reimbursement Construction Contracts.	FAR	Clause	-
☑	✓	52.236-15 | Schedules for Construction Contracts.	FAR	Clause	-
☑	✓	52.232-27 | Prompt Payment for Construction Contracts.	FAR	Clause	-
☐	✓	52.232-5 | Payments under Fixed-Price Construction Contracts.	FAR	Clause	-
☐	✓	52.228-16 | Performance and Payment Bonds-Other Than Construction.	FAR	Clause	-

Included Clauses
Following clauses are included in the template

Search Clauses — Select a Source — — Select a Clause Type —

REMOVE FROM TEMPLATE

	Clause	Source	Type	Effective Date
	No clauses available			

CANCEL   CREATE

5. Once your desired clauses are selected, click **ADD TO TEMPLATE**.
   - The selected clauses will appear in the Included Clauses section.
   - **Note:** To remove one or more clauses from **Included Clauses**, click the checkbox ☐ next to each clause you want to remove and select **REMOVE FROM TEMPLATE**.
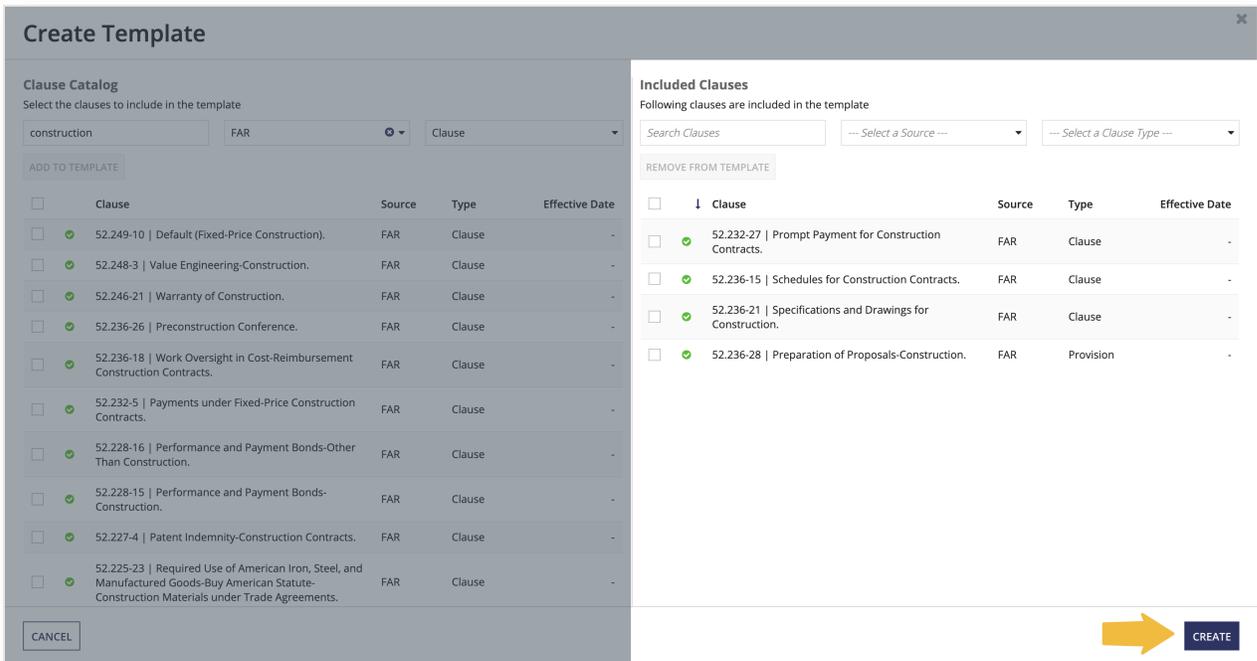
6. After adding the desired clauses, click **CREATE** to create the template.

Updating an existing template

The Clause Automation site also allows you to easily update your templates.

To update an approach:

1. Click on the ⋮ icon at the left of each template.
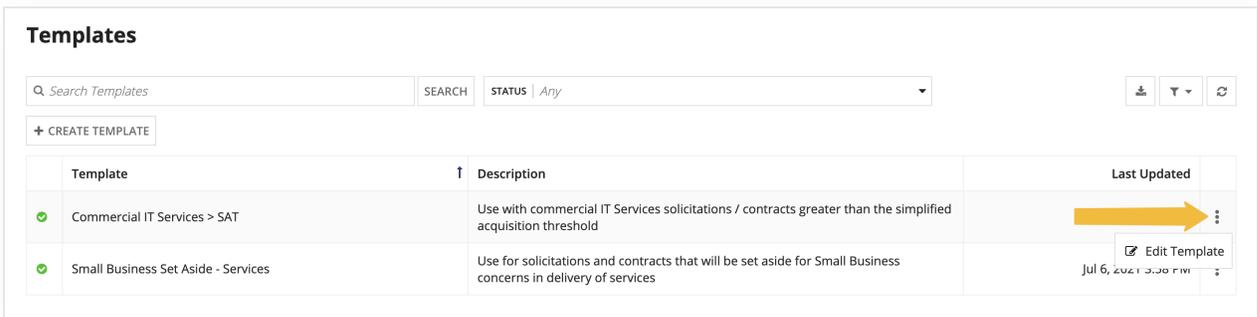
2. Select the **Edit Template** action that displays.
3. If desired, update the **Template Name**, **Description**, or both.
4. Change the template **Status**.
5. Add tasks to any phase.
    - Click **ADD TASK** for the desired phase.
6. In the Clause Catalog section, select one or more clauses that you want to add to the template.
    - You can search for a specific clause in the clause list or filter the clauses by **Source** or **Clause Type**.
7. Once your desired clauses are selected, click **ADD TO TEMPLATE**.
    - The selected clauses will appear in the Included Clauses section.
8. In the **Included Clause** section, select one or more clauses that you want to remove from the template.

- You can search for a specific clause or filter by **Source** and **Clause Type**.
9. After selecting the clauses you want to remove, click **REMOVE FROM TEMPLATE**.
10. After modifying the template, click **SAVE** to save the updates.

All future clause sets will use the modified template. Clause sets that already contain the template will not be affected.

Modifying Dropdown Lists in GCA

Introduction

You can customize the Government Clause Automation solution to your organization's particular needs. The various interfaces in the out-of-the box solution contain dropdown lists that you can modify by changing the values in the reference data tables with values that reflect the data that is unique to your processes. For example, you can add or delete values that display in the Clause Source dropdown list.

This page outlines how to modify the values for the dropdown lists in the various interfaces of the GCA solution.

- If you need to add a value to a particular dropdown list, add a row to the reference data table. See the Adding a new dropdown value section.
- If you need to remove a value from a dropdown list, deactivate the value in the reference data table. See the Deactivating a new dropdown value section.
- If you want to add a new dropdown list, create a new dropdown list type in the reference data table. See the Adding a new dropdown list section.

See the Reference Data Tables page for descriptions of the table structures.

Adding a new dropdown value

Most dropdown values for GCA are stored in the `AS_GCA_R_DATA` table. Updating this table allows you to control which dropdown values and lists display to end users moving through the evaluation process.

To add a value to a dropdown list:

1. Insert a new row into the `AS_GCM_R_DATA` table.
2. Update each column with the following information:
   - REF_LABEL: The new value you are adding.

- REF_TYPE: A grouping category for the dropdown values; a name for the dropdown list.
- SORT_ORDER: Optional field that can be used specifying the sort order.
- Note: In order to implement the sort order, you will have to update the queries applied to this column.
- REF_ICON: Optional field that can be used to specify an icon for this entry.
- REF_COLOR: Optional field that can be used to specify the icon color.
- IS_ACTIVE: true (1).
- CREATED_BY: Your Appian username.
- CREATED_DATETIME: The current timestamp in the YYYY-MM-DD HH:MM:SS format.
- MODIFIED_BY: Your Appian username.
- MODIFIED_DATETIME: The current timestamp in the YYYY-MM-DD HH:MM:SS format.

After the row is inserted, this value will be available in any of the dropdown lists that have the same reference `REF_TYPE` as the value you inserted.

Example

To add a new dropdown value, you could use the following SQL statement by replacing the values in the angle brackets (`< >`) with your data.

```
1  INSERT INTO `AS_GCM_R_DATA` (`REF_DATA_ID`, `REF_LABEL`, `REF
2  _TYPE`, `IS_ACTIVE`, `CREATED_BY`, `CREATED_DATETIME`, `MODIFIED_BY`, `MODIFIED_DA
3  VALUES (null, '<New Label>', '<Type>', 1, '<Username>', CURRENT_TIMESTAMP(), '<Use
4  (null, '<New Label>', '<Type>', 1, '<Username>', CURRENT_TIMESTAMP(), '<Username>'
```

Deactivating a dropdown value

If there is a value in a dropdown list that is no longer needed, deactivate the value by changing the `IS_ACTIVE` value in the `AS_GCM_R_DATA` from 1 (true) to 0 (false).

After the update is made, this value will no longer display in any dropdown list. The value will continue to display for evaluations that are already active and historical evaluations.

Deactivating an evaluation status or task status is not recommended, as it will negatively affect other aspects of the application. Deleting data from the table is not recommended except during initial set up. If the application is already in use, deleting data rather than deactivating it may cause issues.

Example

To deactivate a dropdown value, you could use the following SQL statement. Replace `<ID Being Updated>` with the `R_DATA_ID` value. For example, to deactivate *Agency* in the following table, `<ID Being Updated>` would be 3.

REF_DATA_ID	LABEL	TYPE	IS_ACTIVE
1	FAR	Source	1

REF_DATA_ID	LABEL	TYPE	IS_ACTIVE
2	Department	Source	1
3	Agency	Source	1

Note that this example uses MySQL syntax.

```
1  UPDATE AS_GCM_R_DATA SET IS_ACTIVE = 0 WHERE R_DATA_ID = <ID Being Updated>
```

Adding a new dropdown list

If you want to add a new dropdown list, you need to create a new dropdown list type. There are two main steps to add a new dropdown list:

1. Add a new row to the `AS_GCM_R_DATA` table. See Adding new dropdown values for instructions on how to add new rows.
   - For the value in the `REF_TYPE` column, enter a name for the new dropdown list, such as Entity Region.
2. Create a constant in the application to query this from the database. See Using a new dropdown list in the application for instructions on how to set this up.

Using a new dropdown list in the application

After a new dropdown list type has been added to the `AS_GCM_R_DATA` table, it will need a constant to point to it in order to be used in interfaces.

1. Go to the `AS GCM Baseline` application in Appian Designer.
2. Create a new constant called `AS_GCM_REF_TYPE_<NEW_DROPDOWN_LIST_TYPE>`. For example `AS_GCM_REF_TYPE_CLAUSE_STATUS`.
   - Type: Text
   - Value: `<New Dropdown List Type>`
     - Note: Be sure this matches the dropdown list name in the `REF_TYPE` column of the `AS_GCM_R_DATA` table exactly. For example, if the name in the `REF_TYPE` column is Evaluation Status, the value here must be the same.
   - Save it in the `AS GCM SAIL Design Objects` folder.

After the dropdown list constant has been created, the list is ready to be used by the `AS_GCM_QE_getRefDataByTypes` rule. This rule pulls all of the reference data onto the interface that needs a reference value. `AS_GCM_QE_getRefDataByTypes` takes in typelist—an array of text—corresponding to the type values in the database you need to use.

EXAMPLE

To pull in the Evaluation Status dropdown list, you would use the rule as shown below:

```
1
2
3
```

```
4   local!refData: rule!AS_GCM_QE_getRefDataByTypes(
5     refTypes: {
6       /* Evaluation Status */
        cons!AS_GCM_REF_TYPE_EVALUATION_STATUS,
      }
    )
```

As shown in the example, you can pass in either text or a constant of type `text` with the corresponding dropdown list type.

Other reference data tables

There are several other tables that contain reference data that appear in lists. The information stored in these tables are universal and shouldn't change often. However, if you ever have to change the list of countries, currencies, industry classification codes, or states, refer to the below tables.

- AS_GAM_R_Country
    - A list of countries
- AS_GAM_R_State
    - A list of US states

Modifying UI Text in GCA

Introduction

Appian stores certain UI text for Government Clause Automation's interfaces in bundle files, including:

- Labels
- Validation Messages
- Button Labels
- Tooltips
- Instructional text

If you need to perform a mass update of the UI text for your Clause Automation solution so that it matches your organization's terminology, you can perform a bulk update by creating a custom bundle file that overrides the values in the default bundle files. When you create a custom bundle file, GCA will retain the values during future upgrades.

Alternatively, if you need to modify a small number of UI text for your GCA solution, these modifications are best done using the Solution Customization Suite. You can find more information about customizing UI text for your solution in the Solution Customization User Guide.

Note that some UI text is contained in reference data tables, such as dropdown lists. To modify this type of UI text, see Modifying Dropdown Lists.

Requirement Management bundle files

The bundle file included in this solution is `AS.GCA.ClauseAutomation_default_en_US`. The `AS GCM Properties Files` folder in the `AS GCM Knowledge Center` stores the `AS.GCA.ClauseAutomation_default_en_US` bundle file, which is for the Government Clause Automation site.

You can use these bundle files to create a custom bundle file for your organization.

Creating a custom bundle file

To create a custom bundle file:

1. Go to Appian Designer and open the Government Clause Automation application package.
2. Locate and open the GCA Bundle Files Folder; `AS GCM Properties Files`.
3. Click on the bundle file in the folder you selected.
4. Click **Download file** and open the file in a text editor.
5. In this file, you'll see every key used in the application and the label that displays for each key.
6. Identify the keys for the labels that you want to change.
7. Edit each label that you want to change. Do NOT edit the keys.
8. Save the file.
9. Upload your file as a new document:
   - Click **New** -> **Document**.
   - Upload the file to GCA in the **File Upload**.
   - Click **NEXT**.
   - Name the file `AS.GCA.ClauseAutomation_custom_en_US`.
   - In the **Save In** field, verify the correct GCA Bundle File Folder is selected.
   - Click **Create Document**

These custom labels will now override the default labels and show up in the application interface for users. If any changes need to be made to this custom bundle file, download the custom bundle file, edit it, and re-upload as a new version (not a new document). When you upgrade Government Clause Automation, your custom bundle file will not be replaced or updated.

Modifying Reference Data Tables

Introduction

The solution is designed to be customized to your organization's particular needs. The various interfaces in the out-of-the box solution contain values that are stored in database tables. This information is called reference data.

The main type of reference data in GCA is:

- Dropdown lists and their values.

- See Modifying Dropdown Lists for instructions on how to add and deactivate values in dropdown lists, and add new dropdown lists.

You can identify reference data tables by looking for tables that have _R_ in the name, such as `AS_GCM_R_DATA`.

This page describes the structure of the reference data tables.

Reference data table

Dropdown values for GCA are stored in the AS_GCM_R_DATA table. Updating this table allows you control what dropdown values and lists display to end users moving through the award process. See Modifying Dropdown Lists for more information on how this table is used. See the following table for a description of the fields in the `AS_GCM_R_DATA` table.

Name	MySQL Data Type	Appian Data Type	Description
REF_DATA_ID	int(11)	Number (integer)	The primary key.
REF_LABEL	varchar(255)	Text	The name that the end user will see in the dropdown list.
REF_TYPE	varchar(255)	Text	What reference type the value is grouped by. For example, Evaluation Status.
REF_DESCRIPTION	varchar(255)	Text	The description of the dropdown list value. For example, "the evaluation status is setting up."
REF_ICON	varchar(50)	Text	The icon associated with the value. For more information, visit the Appian icons page.
REF_COLOR	varchar(50)	Text	Determines the color associated with the data. Valid values: STANDARD, POSITIVE, NEGATIVE, ACCENT, or a specific hex value. For example, #FFBF00.
SORT_ORDER	int(11)	Number (integer)	Determines the order of values displayed in the dropdown.

Name	MySQL Data Type	Appian Data Type	Description
IS_ACTIVE	tinyint(1)	Boolean	Determines if the value will display, or not. Valid values: 1, 0. 1 will display the value and 0 will not display the value.
CREATED_BY	varchar(255)	Text	The user who added the reference data originally.
CREATED_DATETIME	timestamp	DateTime	The date and time that the reference data was originally added.
MODIFIED_BY	varchar(255)	Text	The user who changed the reference data most recently.
MODIFIED_DATETIME	timestamp	DateTime	The date and time that the reference data was most recently changed.

See below for an example of what the first seven columns of the reference data may look like:

REF_DATA_ID	LABEL	TYPE	REF_ICON	REF_COLOR	IS_ACTIVE
1	FAR	Source	NULL	NULL	1
2	Department	Source	NULL	NULL	1
3	Agency	Source	NULL	NULL	1
4	Clause	Type	NULL	NULL	1
5	Provision	Type	NULL	NULL	1
6	Uniform Contract Format (UCF)	Format	NULL	NULL	1
7	Incorporated by Reference (IBR)	Format	NULL	NULL	1

Groups Reference Page

Introduction

Government Clause Automation comes with a number of groups provided by default. By adding users to these groups, you can grant access to separate parts of the application.

There are three categories that the default groups belong to:

- **Business Groups**
    - These groups represent the different business roles that will interact with the application.
    - Examples include **Contracting Officer** and **Contract Specialist**.
- **Security Groups**
    - These groups are set as the security for certain Appian objects. Different business groups are members of security groups to grant access to application functionality to entire roles.
    - Examples include **AS GCM Clause Management Site Access** and **AS GCM View Documents PM Access**.
- **Wrapper Groups**
    - These groups are used to group together a number of groups of the same category. For instance, a list of business groups may be added to a certain wrapper group. This allows for querying for all groups of a certain category in different parts of the application.
    - Examples include **AS GCM Business Roles**.

This page lists the default groups provided with GCA, what business groups belong to which wrapper and security groups, and what actions members of the security groups can perform.

Group visibility

In order for the correct groups to show up in application pickers, each type of group has the following visibility settings:

Group Type	Visibility	Reason
Business group	Public	End users should be able to select business groups in application pickers.
Security group	Private	End users should never see security groups in application pickers.
Wrapper group	Private	End users should never see wrapper groups in application pickers.

Wrapper group membership

This table lists all of the default business groups and the wrapper group to which they belong.

These business groups are members of the **AS GCM All Business Users** group type.

Wrapper Group	Business Group
AS GCA Business Roles	Contracting Officer
	Contract Specialist
	Contracting Manager
	Privileged Users

Actions users can perform based on their group membership

This table lists all of the actions that are available in GCA and the security groups that control access to each action. It also lists the business groups that are members of each security group.

For security groups where no business group is listed, Appian recommends that you grant membership to individual users.

These security groups are members of the **AS GCM Security Groups** group.

Actions with Security Group	Security Group	Business Groups with Access
Manage Appian design objects for Clause Automation solution.	AS GAM Appian Administrators	• NA
View the Clause Automation site.	AS GCM Clause Management Site Access	• All Business Users
View a Clause Set.	AS GCM Clause Set Record Access	
View a Clause.	AS GCM Clause Record Access	
Import Clauses.	AS GCM Import Clause PM Access	
Create a Clause Set.	AS GCM Create Clause Set PM Access	

Actions with Security Group	Security Group	Business Groups with Access
Add Clauses manually.	AS GCM Add Manual Clauses PM Access	
Validate a Clause Set.	AS GCM Validate Clause Set PM Access	
View a Clause Set document.	AS GCM View Document PM Access	
Create or update an evaluation.	AS GCM Create or Update Template PM Access	• Contracting Officer • Contract Specialist • Privileged User
Create or update questionnaire rule.	AS GCM Create or Update Rule PM Access	
Remove a Clause.	AS GCM Remove Clause PM Access	