

# Government Clause Automation v1.5 PDF



This content applies solely to Government Clause Automation, which must be purchased separately from the Appian base platform. This content was written for Appian 22.1 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 GCA?](#) 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?

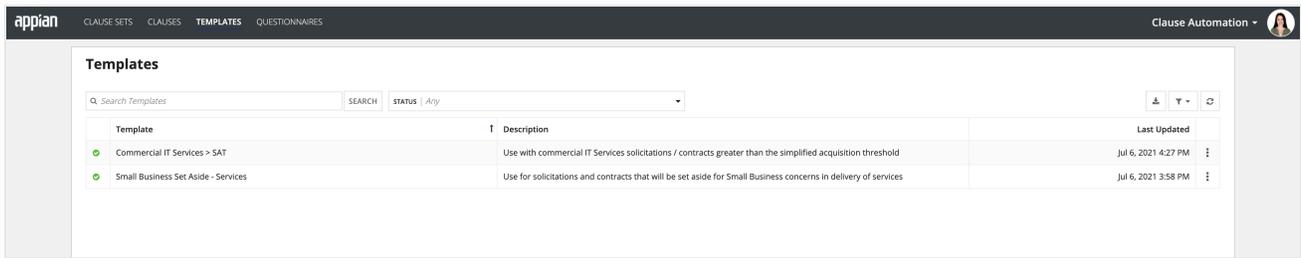
### Guided and automated clause selection process

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.

The screenshot shows the 'Create Clause Set' wizard in the Appian application. The interface is divided into five steps: 1. PROVIDE DETAILS (active), 2. ANSWER QUESTIONNAIRE, 3. REVIEW CLAUSES, 4. ADD CLAUSES, and 5. GENERATION COMPLETE. The 'Basic Information' section includes fields for 'Type' (Solicitation or Award), 'Category' (New or Amendment), and 'Solicitation / Award ID'. Below this are dropdown menus for 'Contracting Officer', 'Contract Specialist', and 'Contracting Officer's Representative (COR)'. The 'Configuration' section has a radio button for 'Is this an action off an existing vehicle?' and a 'Template' dropdown menu. The 'Contract Type' section features a list of 'Available Contract Types' (FP SUP, CR SUP, FP R&D, CR R&D) and a 'Selected Contract Types' box. Navigation buttons 'ADD SELECTED' and 'REMOVE SELECTED' are positioned between the two boxes. A 'What is a clause set?' help box is visible on the right side of the screen.

### 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.



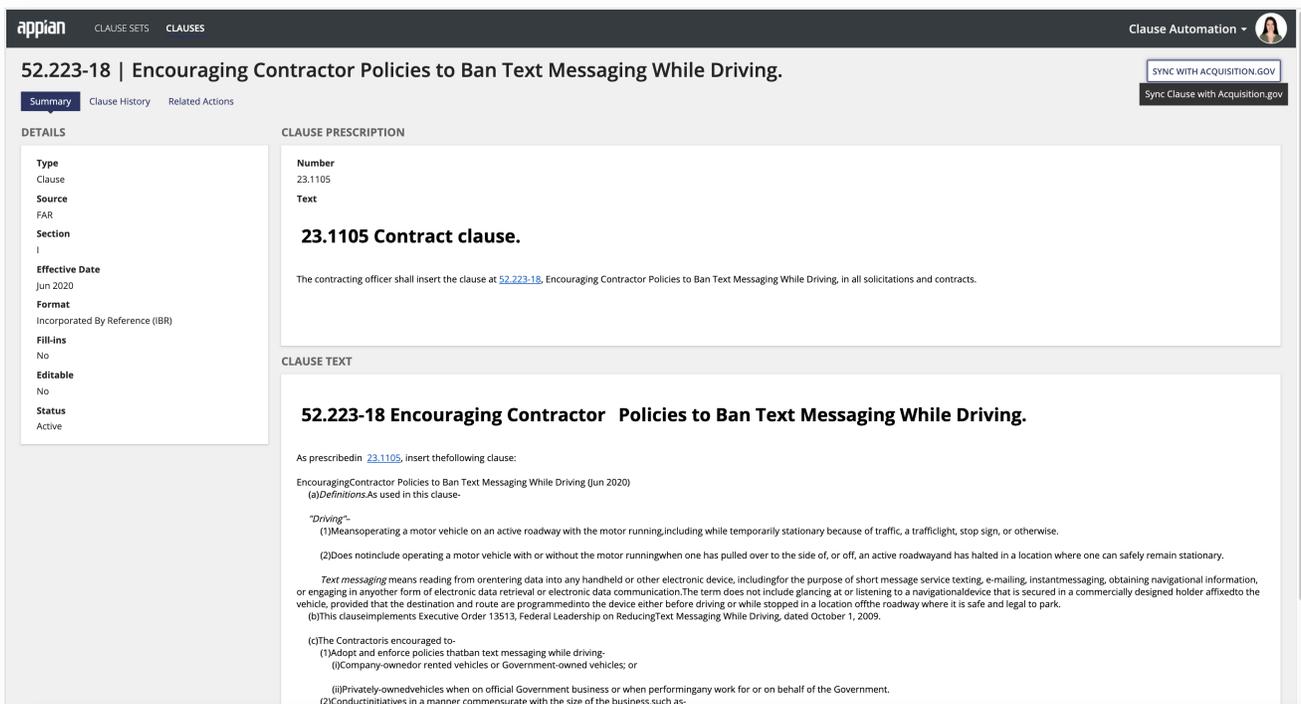
## Configurable questionnaire

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.



## 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.



## 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.

Clause	Section	Prescription Number	Last Updated	Last Sync
52.223-18   Encouraging Contractor Policies to Ban Text Messaging While Driving. <i>Clause - FAR - Jun 2020</i>	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. <i>Clause - FAR - Mar 2000</i>	I	17.208	May 28, 2021 10:50 AM	Jul 2, 2021 10:45 AM
52.202-1   Definitions. <i>Clause - FAR</i>	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. <i>Clause - FAR - Jun 2020</i>	I	23.1105	Jul 2, 2021 9:18 AM	Jul 2, 2021 9:18 AM
52.202-1   Definitions. <i>Clause - FAR - Jun 2020</i>	I	2.201	Jul 2, 2021 9:21 AM	Jul 2, 2021 9:20 AM
52.203-2   Certificate of Independent Price Determination. <i>Provision - FAR</i>	-	3.103-1	-	Jul 2, 2021 10:11 AM
52.203-3   Gratuities. <i>Clause - FAR</i>	I	3.202	Jul 24, 2021 1:00 AM	Jul 24, 2021 1:00 AM
52.203-5   Covenant Against Contingent Fees. <i>Clause - FAR</i>	-	3.404	-	Jul 2, 2021 10:11 AM
52.203-6   I <i>Clause - FAR</i>	I	3.503-2	Jul 24, 2021 1:00 AM	Jul 24, 2021 1:00 AM
52.203-7   Anti-Kickback Procedures. <i>Clause - FAR</i>	-	3.502-3	-	Jul 2, 2021 10:11 AM
52.203-8   Cancellation, Rescission, and Recovery of Funds for Illegal or Improper Activity. <i>Clause - FAR</i>	-	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 clauses and autopopulate clause fill-ins in a single location

Contracting personnel need to complete their fill-ins 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.

### Edit Clause

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

**Clause Text \***

**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 \_\_\_\_ [insert the period of time within which the Contracting Officer may exercise the option]; 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 \_\_\_\_\_ (months) (years).

(End of clause)

CANCEL
SAVE AS DRAFT
MARK AS COMPLETE

GCA can also auto-suggest clause fill-ins based on previously entered values. This allows you to select a value to pre populate in your clause for each fill-in, which saves time and reduces user input.

### Clause Fill-ins ✕

1/3 Completed 🔍 ○ ○

**Insert the period of time within which the Contracting Officer...**

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

[View Clause](#)

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 [insert the period of time within which the Contracting Officer may exercise the option]; 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.

**Insert the period of time within which the Contracting Officer may exercise the option**

**Quick Fill**

Choose a text from the list to insert

Type

Solicitation +

Contracting Officer

A ContractingOfficer +

CANCEL

SAVE AS DRAFT
NEXT

## 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.

CLAUSE SETS   CLAUSES

Clause Automation

### 20210821RA001 FINALIZE CLAUSE SET   UPDATE CLAUSE SET   VALIDATE CLAUSE SET   ⋮

Summary
Questionnaire
Excluded Clauses
Clause Set History
Related Actions

**Overview** Validation is pending

<b>Type (Category)</b> Solicitation (New)	<b>Contract Purpose</b> Commercial	<b>Pricing Type</b> Cost Reimbursement (CR)
<b>Contracting Officer</b> Christine Chenal	<b>Contract Purpose Type</b> Services (SVC)	<b>Contract Method</b> Negotiated contract (NEG CONT) <span style="float: right; font-size: 8px;">Add Shortcut</span>
<b>Contract Specialist</b> Melanie Connors	<b>Contract Purpose Detail</b> -	<b>Action of Existing Vehicle</b> No
<b>Template</b> Commercial IT Services > SAT		

**Applied Clauses**

SEARCH

TYPE | Any ▼

SOURCE | Any ▼

USAGE | Any ▼

FILL-INS | Any ▼

EDITABLE | Any ▼

+ ADD CLAUSES

Clause	Usage	Section	Fill-ins	Editable	Added Through
52.202-1   Definitions. <small>Clause - FAR - Jun 2020</small>	Required	I	No	No	Provide Details <span style="font-size: 8px;">⋮</span>
52.203-17   Contractor Employee Whistleblower Rights and Requirement To Inform Employees of Whistleblower Rights. <small>Clause - FAR</small>	Required	-	-	-	Provide Details <span style="font-size: 8px;">⋮</span>
52.203-5   Covenant Against Contingent Fees. <small>Clause - FAR</small>	Required	-	-	-	Provide Details <span style="font-size: 8px;">⋮</span>
52.203-6   I <small>Clause - FAR</small>	Required	-	-	-	Provide Details <span style="font-size: 8px;">⋮</span>
52.203-7   Anti-Kickback Procedures. <small>Clause - FAR</small>	Required	-	-	-	Provide Details <span style="font-size: 8px;">⋮</span>

## 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.

# GCA 1.5 Release Notes

## What's New?

The Government Clause Automation 1.5 Release Notes provides an overview of the latest changes and improvements to the Government Clause Automation Solution. The new features and improved capabilities were designed with best practices in mind.

## Improved Contract Type Selection Experience and FAR Matrix Inclusion

This release of Government Clause Automation (GCA) includes a new and improved contract type selection experience that allows you to select multiple contract types and ensures that the clauses GCA pulls in match those in the official Acquisition.gov FAR Smart Matrix. The improved contract type selection experience takes into account recent updates to the FAR Smart Matrix and to the Acquisition.gov APIs.

The screenshot shows the 'Create Clause Set' interface in Appian. The top navigation bar includes 'appian', 'CLAUSE SETS', 'CLAUSES', 'TEMPLATES', 'QUESTIONNAIRES', and 'Clause Automation'. The main content area is titled 'Create Clause Set' and has a progress bar with five steps: 1. PROVIDE DETAILS (active), 2. ANSWER QUESTIONNAIRE, 3. REVIEW CLAUSES, 4. ADD CLAUSES, and 5. GENERATION COMPLETE.

**Basic Information**

Type \*  
 Solicitation  Award

Category \*  
 New  Amendment

Solicitation / Award ID \*  
Enter ID

Contracting Officer \*  
--- Select Contracting Officer ---

Contract Specialist \*  
--- Select Contract Specialist ---

Contracting Officer's Representative (COR)  
--- Select Contracting Officer's Representative ---

**Configuration**

Is this an action off an existing vehicle?  
 Yes  No

Template  
No Template

**Contract Type**

Available Contract Types

- FP SUP  
Fixed Price Supply
- CR SUP  
Cost Reimbursement Supply
- FP R&D  
Fixed Price Research & Development
- CR R&D  
Cost Reimbursement Research & Development
- FP SVC  
Fixed Price Service

19 Items

Selected Contract Types  
No contract types selected yet

> ADD SELECTED  
< REMOVE SELECTED

**What is a clause set?**

- Clause set is a collection of clauses.
- Based on the information provided, required clauses will be added to the clause set.
- Additional clauses can be selected and added to the clause set as well.

GCA will automatically determine the required, applicable, and optional FAR clauses for your clause set based on up to 8 contract types selected.

This feature also brings improvements to the My Clause Sets record list interface and individual clause set summary pages.

## Additional Solution Updates

We have also updated GCA to work with the latest version of the Appian Regular Expressions plugin. This plugin is used in the weekly background sync to retrieve FAR clauses from Acquisition.gov. In addition, GCA's weekly background sync to handle clause title changes from Acquisition.gov without creating duplicate clauses in GCA.

## Solution Support

Appian provides product and documentation for 12 months from the general availability (GA) release date of a solution release. After 12 months, the solution product documentation is deprecated and archived.

In addition to the Government Clause Automation release notes and product documentation, Appian's Solutions Support team provides a number of services to ensure the success of your Government Clause Automation solution. See the [Appian Solutions and Documentation Support Guide](#) for more information.

## Release History

The Release History table provides information about each Government Clause Automation version, including release dates, supported Appian platform versions, support expiration dates, and documentation availability.

<b>Solution Version</b>	<b>Release Date</b>	<b>Supported Appian Platform</b>	<b>Support Expiration Date</b>	<b>Download PDF</b>
23.1.1.9	20 Mar 23	23.1 +	20 Mar 24	-
22.4.1.8	11 Oct 22	22.4	11 Oct 23	-
22.3.1.7	11 Oct 22	22.3 +	11 Oct 23	-
22.2.1.6	29 Jul 22	22.2 +	29 Jul 23	-
22.1.1.5	7 Jun 22	22.1 +	7 Jun 23	-
21.4.1.4	24 Mar 22	21.4 +	24 Mar 23	-
21.4.1.3	7 Jan 22	21.4 +	7 Jan 23	<a href="#">GCM v21.4.1.3 Docs</a>
21.3.1.2	15 Nov 21	21.3 +	15 Nov 22	<a href="#">GCM v21.3.1.2 Docs</a>

21.3.1.1	27 Sep 21	21.3 +	27 Sep 22	<a href="#">GCM v21.3.1.1 Docs</a>
21.1.1.0	30 Jul 21	21.2 +	30 Jul 22	<a href="#">GCM v21.1.1.0 Docs</a>

You can view the documentation for an unsupported version of Government Clause Automation by clicking the document link associated with the solution version you want to download from the **Download PDF** column. After the download completes, you can open ZIP file to view the PDF.

To learn more about a supported solution version, start with the Government Clause Automation Overview.

## 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 <b>My Clause Sets</b> and <b>All</b> .
	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.

	Exclude Clauses	Ability to exclude a clause from the clause set using a questionnaire rule or template.
	Remove Clauses	Ability to remove a clause from the clause set and provide a reason for required clauses.
	Edit Clauses	Ability 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.

# 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 screenshot displays the Appian Clause Automation interface. At the top, there is a navigation bar with the Appian logo, 'CLAUSE SETS', 'CLAUSES', and 'Clause Automation' with a user profile icon. A 'CREATE CLAUSE SET' button is visible in the top right. Below the navigation bar is a decorative banner with icons representing documents and processes. The main content area is titled 'My Clause Sets' and shows a table of clause sets. The table has columns for Clause Set, Type, Contracting Officer, Contract Specialist, Contract Type, and Last Updated. The table contains 8 rows of data, with some rows marked with a green checkmark icon.

Clause Set	Type	Contracting Officer	Contract Specialist	Contract Type	Last Updated
75D30121F01001	Award	Christine Chenal	Deborah Geary	FP SVC	Aug 8, 2021 11:15 AM
75D30121C00078	Award	Christine Chenal	Charles Parker	FP SUP, CI	Oct 21, 2021 7:22 AM
75D30121F01045	Award	Christine Chenal	Melanie Connors	FP SUP, A&E	Aug 24, 2021 2:09 PM
75D30121R01023	Solicitation	Christine Chenal	Melanie Connors	CI	Aug 8, 2021 9:55 PM
75D30121R01062	Solicitation	Christine Chenal	Deborah Geary	CR SVC	Aug 8, 2021 10:19 AM
75D30121R01042	Solicitation	Christine Chenal	Melanie Connors	FP SUP, A&E	Aug 8, 2021 10:03 AM
75D30121R00056	Solicitation	Christine Chenal	Charles Parker	FP SVC	Aug 8, 2021 10:02 AM
75D30121R01031	Solicitation	Christine Chenal	Charles Parker	FP SVC	Aug 8, 2021 10:19 PM

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, and with the correct data.

The Government Clause Automation solution allows the contracting professional to complete this part of the process with ease by entering 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.

# 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 GCA application into the Appian environment.](#)
5. [Import the administration console settings.](#)
6. [Install hotfixes for your GCA solution version.](#)

Before starting the installation process, review the [System Requirements](#) to make sure all minimum requirements are met.

## System requirements

- Appian version 22.1 for GCA 1.5.
- MariaDB version 10.5.13 or later 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](#).

If you are not using a compatible version of MariaDB, you will need to upgrade to a

## 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-1.17.1.jar**: JAR file used to deploy the Appian Solutions plug-in for self-managed environments.
- **Content Tools Combined Files 12132021.zip**: File used to deploy the Content Tools plug-ins 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-1.7.0.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 V22.1.1.5.0*.
5. In **Downloads**, click the **Download Clause Automation** link.
6. Click **PROCEED** to agree to the License Agreement.
7. Click **Download Clause Automation v22.1.1.5.0** to download the ZIP file.
8. Unzip *GCA Components v22.1.1.5.0.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

If you want to overwrite the current default start page for your GCA solution, you need to import the Admin Console. This is an optional step that is only applicable for specific versions of GCA or a related hotfix. Before performing these steps, be sure they apply to the GCA version installed in your environment.

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.

## Step 6: Install hotfixes

After you finish installing GCA, be sure to check for any relevant hotfixes, and if applicable, apply the latest hotfix version by performing the following steps:

1. Go to the **SUPPORT** tab on [My Appian](#).
2. Click **DOWNLOADS**.
3. Click **SOLUTIONS**.
4. Find and open the *Government Clause Automation* version that's installed in your environment.
5. In **Downloads**, click the first link under the **Hotfix** section.
6. Click **PROCEED** to agree to the License Agreement.
7. Click the hotfix file name to download it.
8. Unzip the hotfix package to access the software installation files.
9. Repeat the main installation steps from 3 to 5 above.

# 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 Government Clause Automation comes with an Acquisition.gov integration. In order to utilize this capability, you must create a Github account and personal access token to use with the solution after configuring it.

If you do not create a Github account, which is required to integrate your GCA solution with Acquisition.gov, it may cause your GCA-Acquisition.gov integration to hit a rate-limit enforced by Github, resulting in incomplete clause syncs.

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 the puzzle.

8. Click **Create account**.

- Check your email for a notification from Github and enter the 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 the **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'll 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 the username you created in [step 6](#).
6. Find the **Password** field, paste the saved personal access token.
7. Click **SAVE**.

Do not use these credentials in multiple environments. Doing so can lead to errors when syncing clauses to GCA.

### Connected System Properties



**HTTP**

Integrate with other systems using HTTP to securely store/share authentication information and a base URL across integrations.

**Name \***

**Description**

**System Logo** ?

**Base URL** ?

**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 Applan environments. [Learn more](#)

**Username**

**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

Activity	Description	Where is it Performed?
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 environments 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 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](mailto: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 22.2 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 v22.2.1.2.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 v22.2.1.2.X** to download the ZIP file.
8. Unzip SolutionsHubv1.2.X.zip to access the software installation files.

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

- appian-solutions-1.27.X.jar
- SolutionsHubv1.2.X.zip
- SolutionsHubv1.2.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](#) (v1.27.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.

## Available Plug-ins

**Search**

Name	Description	Type
Appian Solutions	Plug-in with functions and smart services to be used across Appian Solutions	Plug-in (Function & Smart Service)

All plug-ins are use-at-your-own-risk, and their functionality is not guaranteed by Appian. All plug-ins should be tested thoroughly. For more details about individual plug-ins, visit the [Appian AppMarket](#).

**CLOSE**

6. Click on the plug-in name.

7. Click **DEPLOY**.

## Appian Solutions

Re-deploying plug-ins that are already enabled on this site could take up to a few minutes.

Plug-in with functions and smart services to be used across Appian SolutionsThis plugin contains functions and smart services used across solutions and exclusively for solution applications.

**Contributed By**  
dan.tobias

**Component Type**  
Plug-in (Function & Smart Service)

**Version**  
1.12.0

**Last Updated**  
2021-07-27

**CANCEL** **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-1.27.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 SolutionsHubv1.2.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 `SolutionsHubv1.2.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.

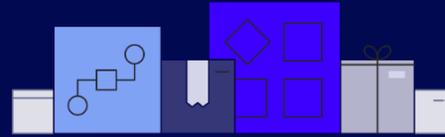
## Landing page

When you open the Solutions Hub, you'll see all of the solutions installed on the environment that support customization through the Solutions Hub.



Welcome, Bryan.

Go-Live with your Solutions.



### Financial Services Suite

Use the links below to manage content for solutions in the suite

[MANAGE SUITE CONTENT](#)



#### Connected Onboarding

Manage content for Release v4.1.0



#### Connected Servicing

Manage content for Release v2.1.0

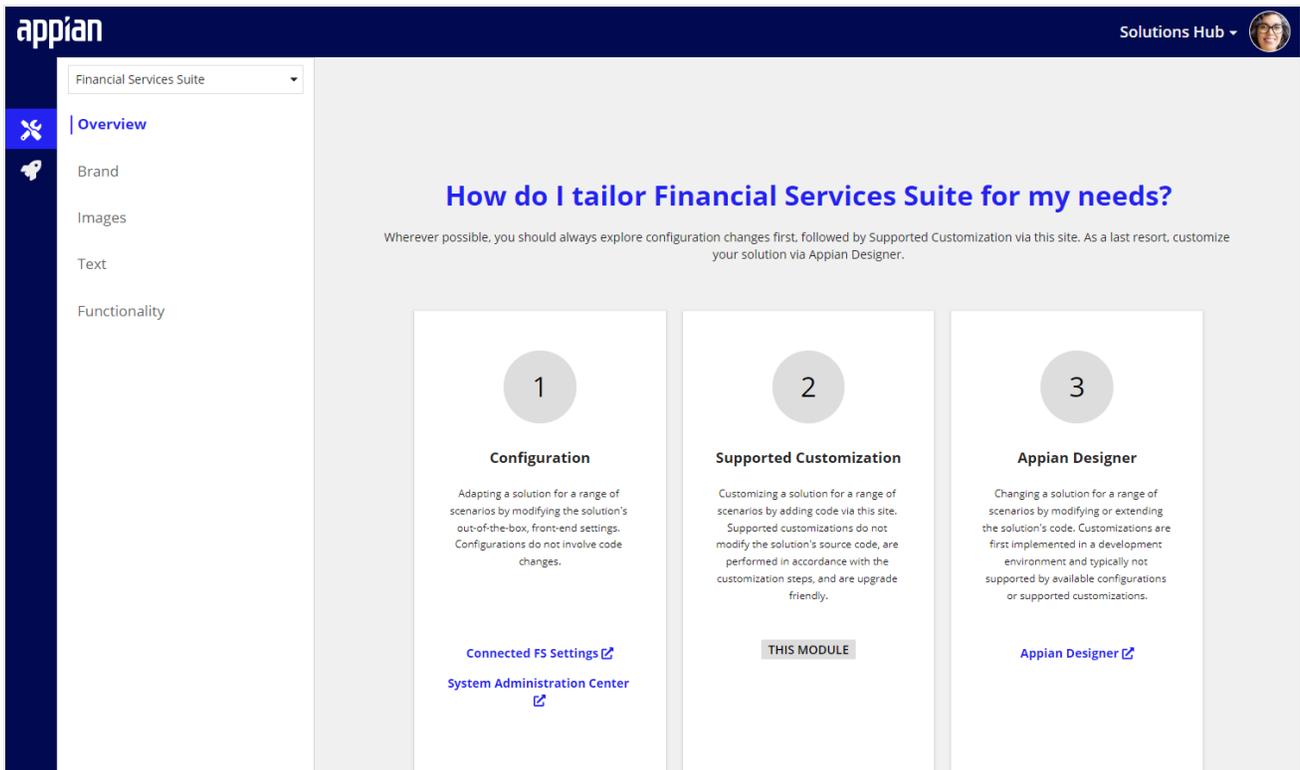


#### Know Your Customer

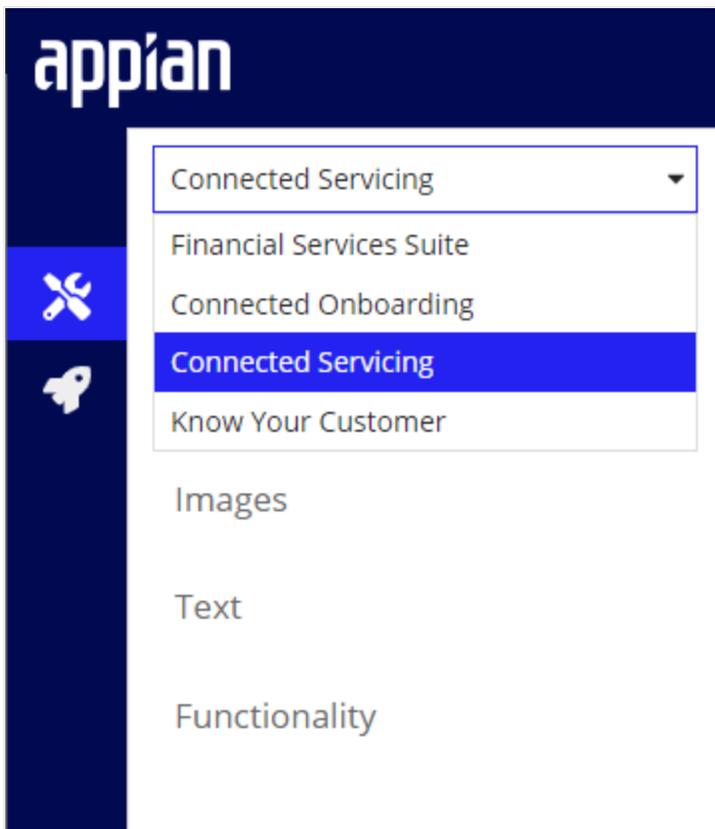
Manage content for Release v1.0.0

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.



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 22.1.1.5 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

The screenshot shows the Appian Solutions Hub branding configuration interface. The top navigation bar includes the Appian logo and a 'Solutions Hub' dropdown menu with a user profile icon. A left sidebar contains navigation options: 'Solution Suite' (dropdown), 'Overview', 'Brand' (selected), 'Images', 'Text', and 'Functionality'. The main content area is divided into three sections, each with an 'UPDATE' button:

- ORGANIZATION**: Shows the 'Organization Name' field with the value 'Appian'.
- LOGOS**: Shows the 'Site Logo' field with a preview of the Appian logo and the 'Favicon' field with a preview of the Appian favicon.
- COLORS**: Shows color selection options for:
  - Accent Color: #2322f0
  - Selected Highlight Color: #2322f0
  - Header Background Color: #020a51
  - Navigation Bar Color: #020a51
  - Loading Bar Color: #2322f0
  - Chart Colors: Midnight (represented by a color palette)

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.

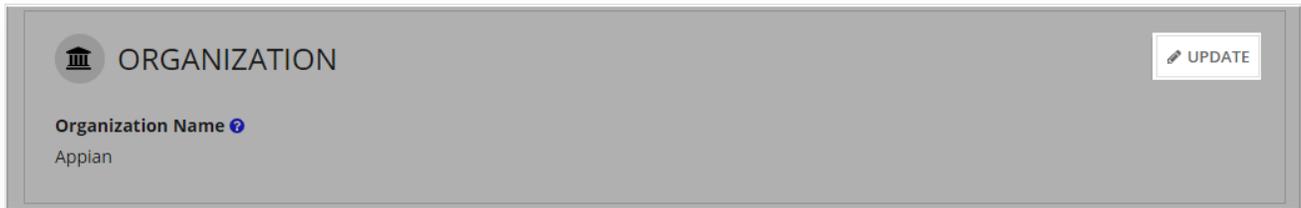
**Note:** the organization name is visible only if your solution supports it.

## 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.

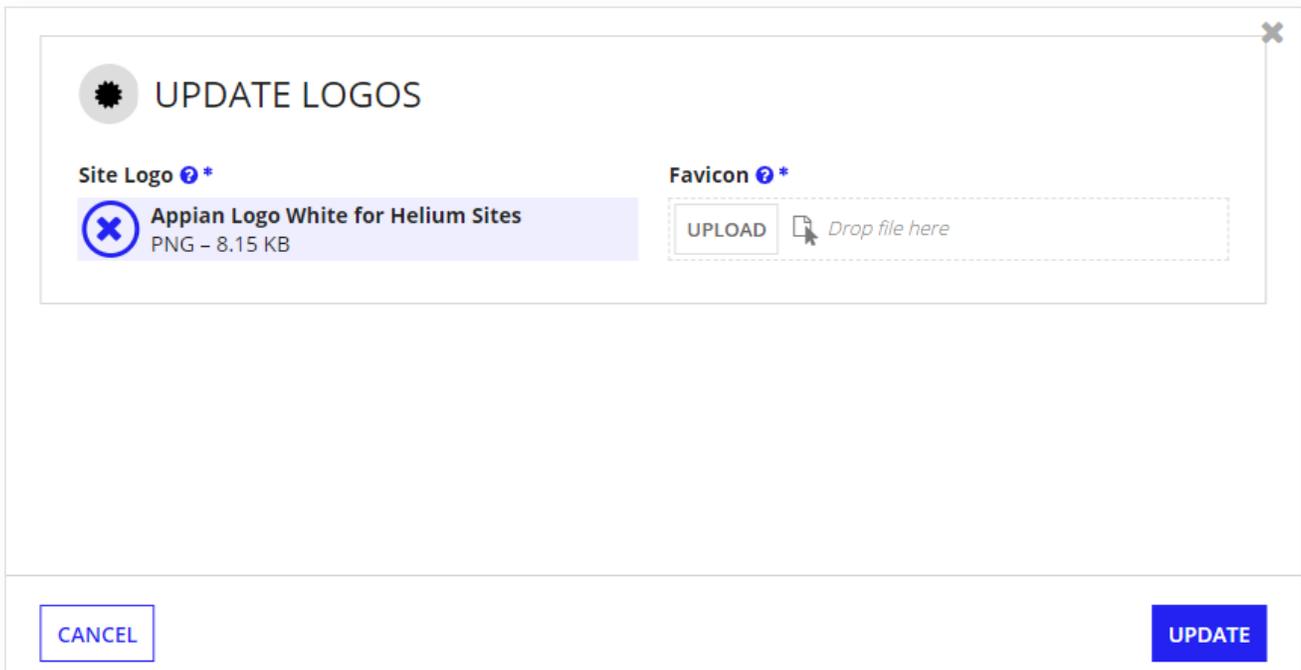


## Logos

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

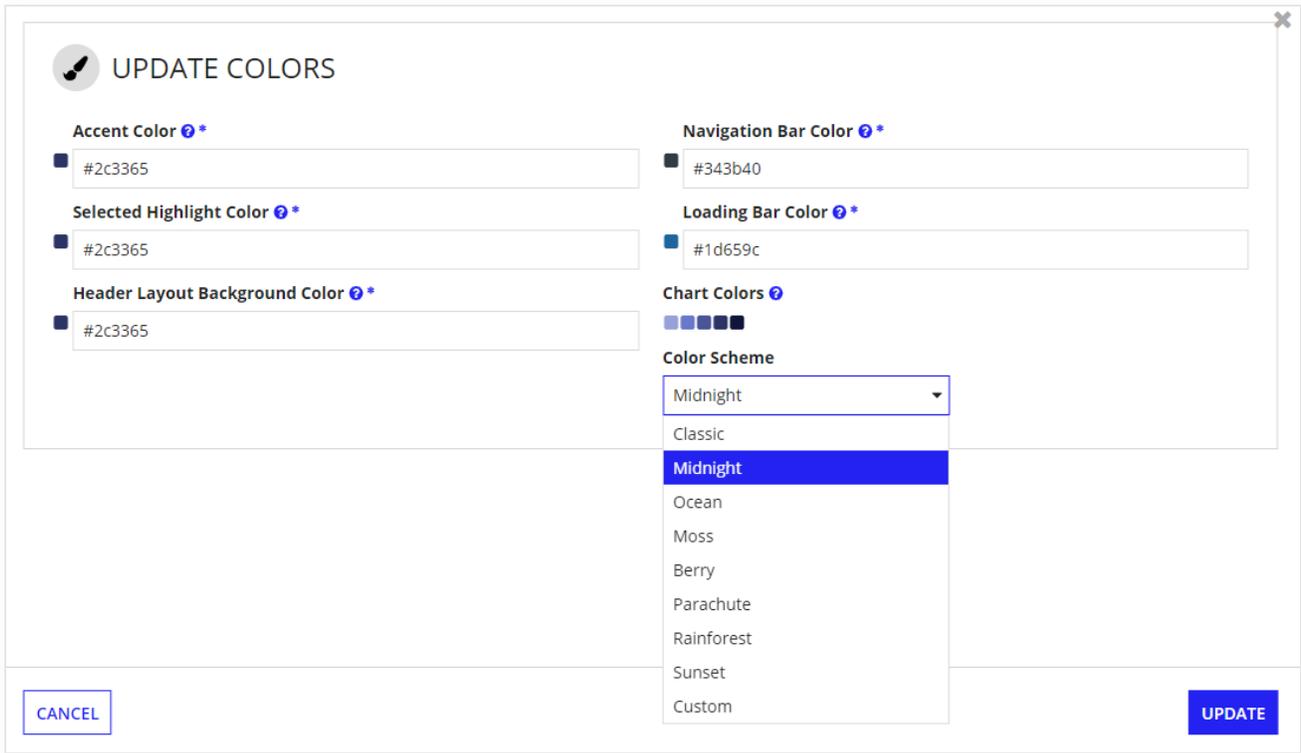
If a solution utilizes charts, you can even set the color palette that is used to render the charts. An extended range of colors beyond the base set listed above may be available for certain solutions.

**COLORS** UPDATE

<b>Accent Color</b> ?	<b>Navigation Bar Color</b> ?
■ #2c3365	■ #343b40
<b>Selected Highlight Color</b> ?	<b>Loading Bar Color</b> ?
■ #2c3365	■ #1d659c
<b>Header Layout Background Color</b> ?	<b>Chart Colors</b> ?
■ #2c3365	■ ■ ■ ■ ■ Midnight

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**

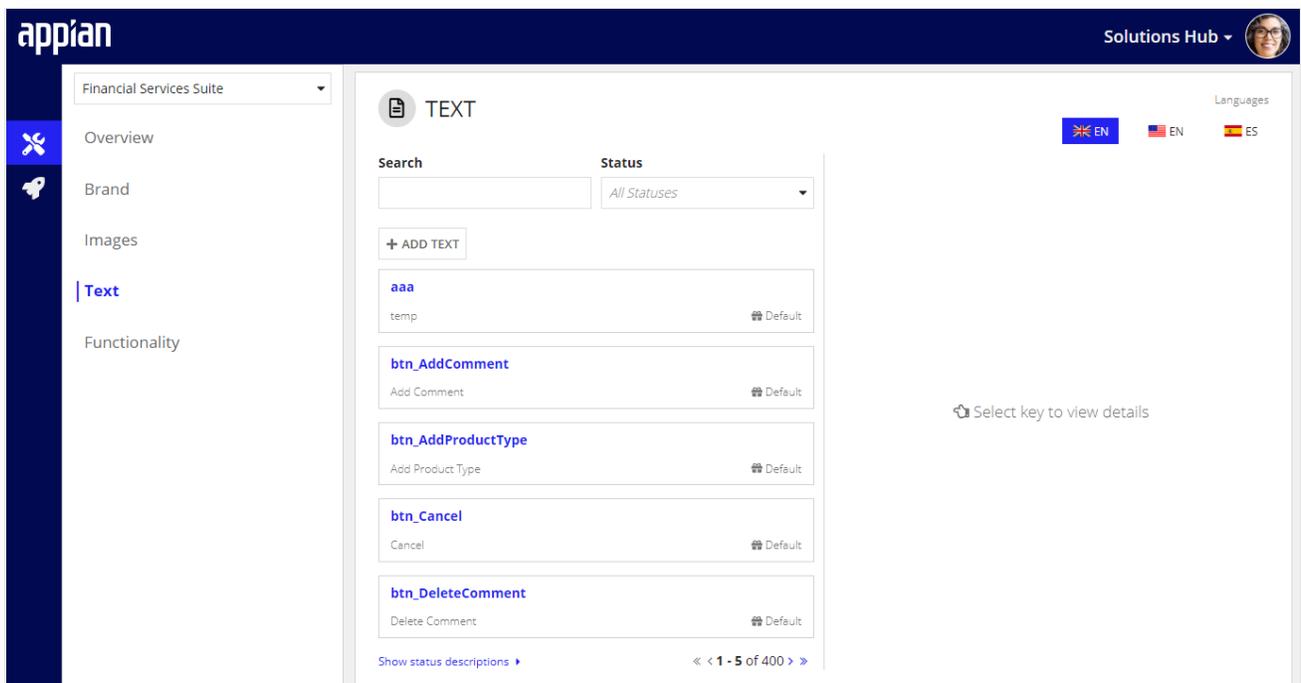


Once you have made your edits, click **UPDATE** to save your changes.

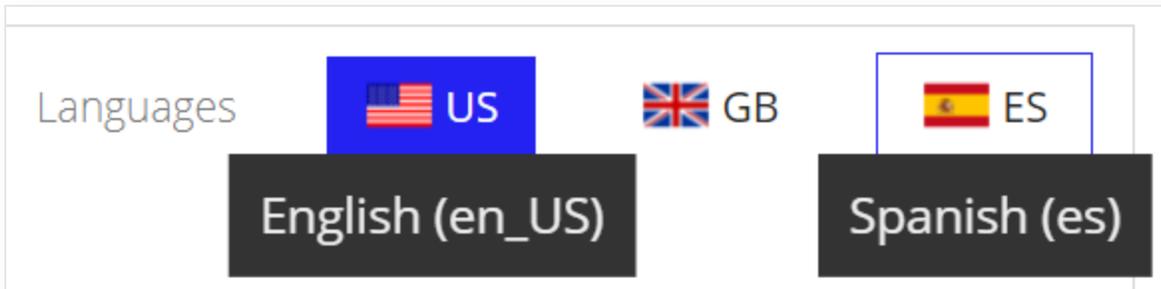
## Text

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.

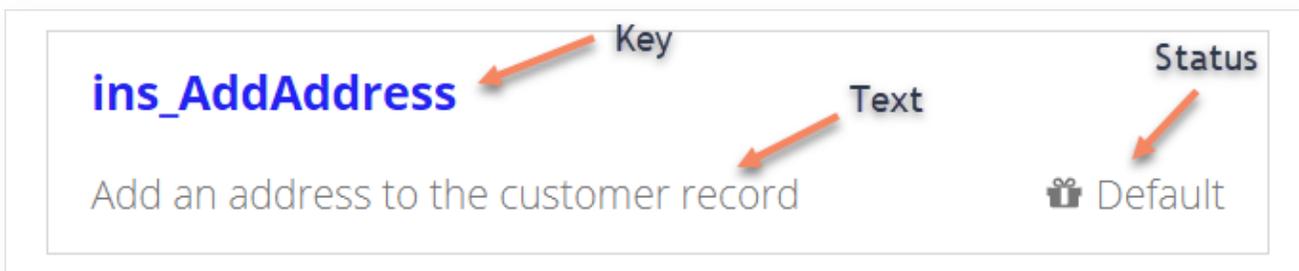
Within the Solutions Customization Suite, navigate to **CONFIGURE & CUSTOMIZE -> TEXT**.



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.



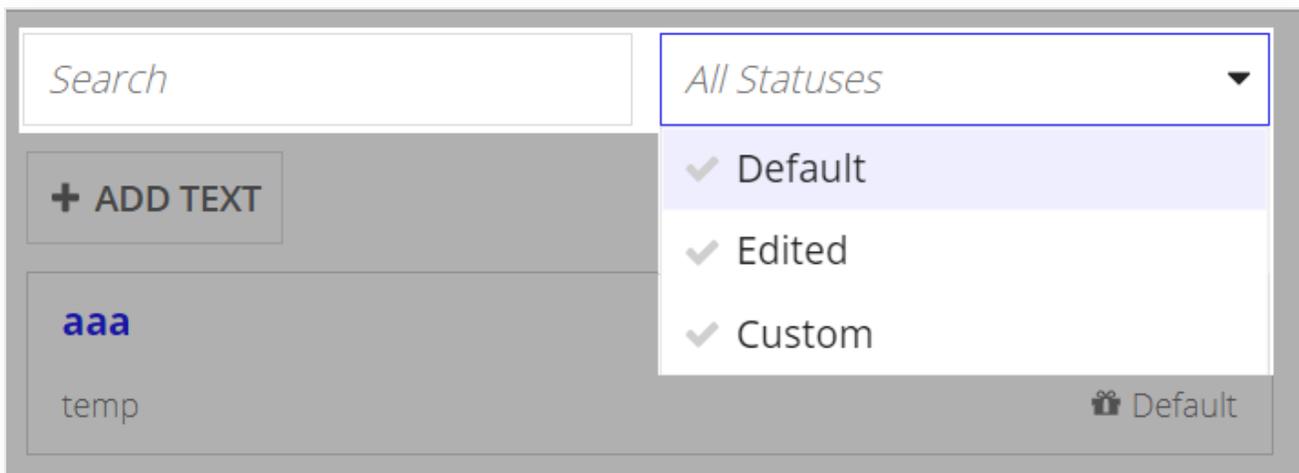
Once a language is selected, a grid shows all of the text within the solution for that language. The key, text, and status are shown on each card:



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.

**ins\_AddAddress**

<b>Text</b>	<b>Bundle Folder</b>
Add an address to the customer record	AS FS I18N Internationalization Files
<b>Status</b>	<b>Bundle File</b>
📦 Default	AS.FS.CustomerRecord
<b>Language</b>	🕒 Last Modified July 14, 2021 4:03PM
en_US	

## Editing text

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

The screenshot shows the Appian Text Editor interface. On the left, there is a list of text cards under the heading 'TEXT'. The cards are: 'btn\_Add' (Add Address), 'btn\_Cancel' (Cancel), 'btn\_Save' (Update Address), 'ins\_AddAddress' (Add an address to the customer record), and 'ins\_NoAddressesAvailable' (No addresses available). The 'ins\_AddAddress' card is selected and highlighted in blue. On the right, a detailed view of the selected card is shown, including its key, bundle folder, status, bundle file, and language. An 'UPDATE' button is visible in the top right corner of the detailed view.

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

## Update Text

Add a mailing address to the customer record.

CANCEL
UPDATE

**Key**  
ins\_AddAddress

**Status**  
DEFAULT

**Language**  
en\_US

**Bundle Folder**  
AS FS I18N Internationalization Files

**Bundle File**  
AS.FS.CustomerRecord

## Adding custom text

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

TEXT
Languages US GB ES

All Statuses

+ ADD TEXT

**btn\_Add**  
Add Address Default

**btn\_Cancel**  
Cancel Default

**btn\_Save**  
Update Address Default

**ins\_AddAddress**  
Add an address to the customer record Default

**ins\_NoAddressesAvailable**  
No addresses available Default

Show status descriptions ▶
« < 1 - 5 of 63 > »

**ins\_AddAddress** UPDATE

**Text**  
Add an address to the customer record

**Status**  
Default

**Language**  
en\_US

**Bundle Folder**  
AS FS I18N Internationalization Files

**Bundle File**  
AS.FS.CustomerRecord  
Last Modified July 14, 2021 4:03PM

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.

**+ ADD TEXT**

**Bundle File \***

AS.CO.SampleBundle

**Key \***

ins\_AddPerson

**Text \***

Add a person to the customer record.

**CANCEL** **SAVE**

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

**+ ADD TEXT**



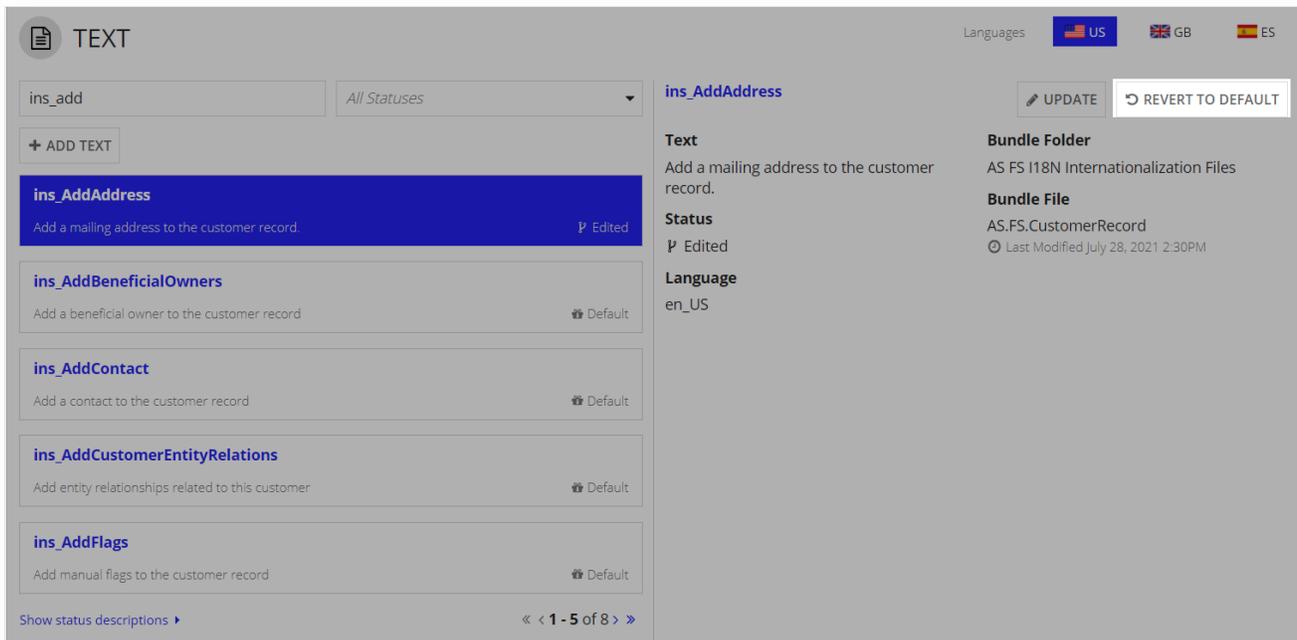
**ins\_AddPerson** was successfully created

**CLOSE**

## 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.



The screenshot shows a user interface for managing text. At the top left, there's a 'TEXT' header with a document icon. Below it, a search bar contains 'ins\_add' and a dropdown menu shows 'All Statuses'. A '+ ADD TEXT' button is present. A list of text cards is shown, with 'ins\_AddAddress' selected and highlighted in blue. This card has a description 'Add a mailing address to the customer record.' and a 'P Edited' status. Other cards include 'ins\_AddBeneficialOwners', 'ins\_AddContact', 'ins\_AddCustomerEntityRelations', and 'ins\_AddFlags', all with 'Default' status. At the bottom left, there's a 'Show status descriptions' link and a pagination indicator '<< < 1 - 5 of 8 > >>'. On the right, a sidebar for 'ins\_AddAddress' shows details: 'Text' (Add a mailing address to the customer record.), 'Status' (P Edited), 'Language' (en\_US), 'Bundle Folder' (AS FS I18N Internationalization Files), and 'Bundle File' (AS.FS.CustomerRecord, Last Modified July 28, 2021 2:30PM). At the top right of the sidebar are 'UPDATE' and 'REVERT TO DEFAULT' buttons.

## 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.



The screenshot shows the same user interface as the previous one, but with a different text card selected. The search bar now contains 'ins\_'. The 'ins\_AddPerson' card is selected and highlighted in blue, with a description 'Add a person to the customer record.' and a 'Custom' status. The sidebar for 'ins\_AddPerson' shows details: 'Text' (Add a person to the customer record.), 'Status' (Custom), 'Language' (en\_US), 'Bundle Folder' (AS CO I18N Internationalization Files), and 'Bundle File' (AS.CO.SampleBundle, Last Modified July 28, 2021 2:29PM). At the top right of the sidebar are 'UPDATE' and 'DELETE' buttons.

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

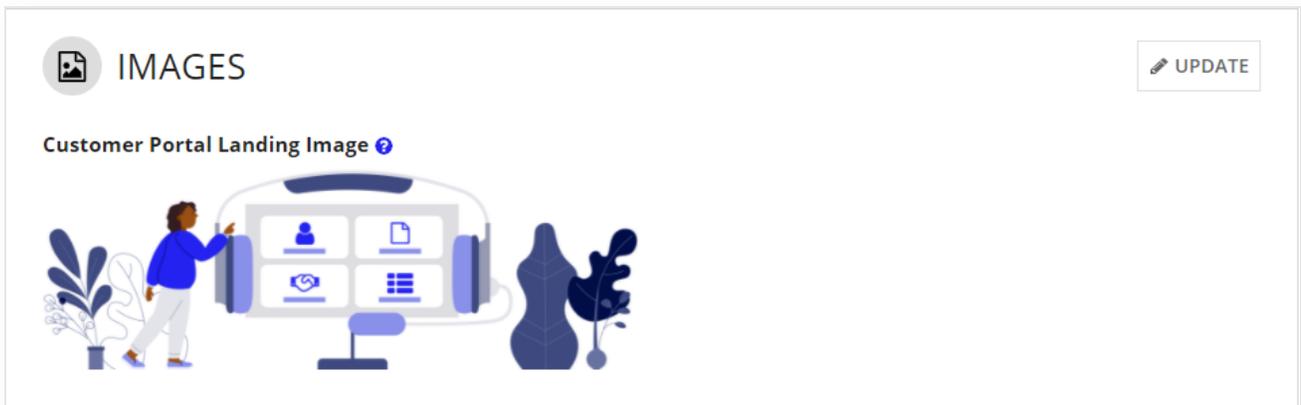
In [%1] is currently closed, [%1] is an argument. When working with arguments, keep the following in mind:

- 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}.

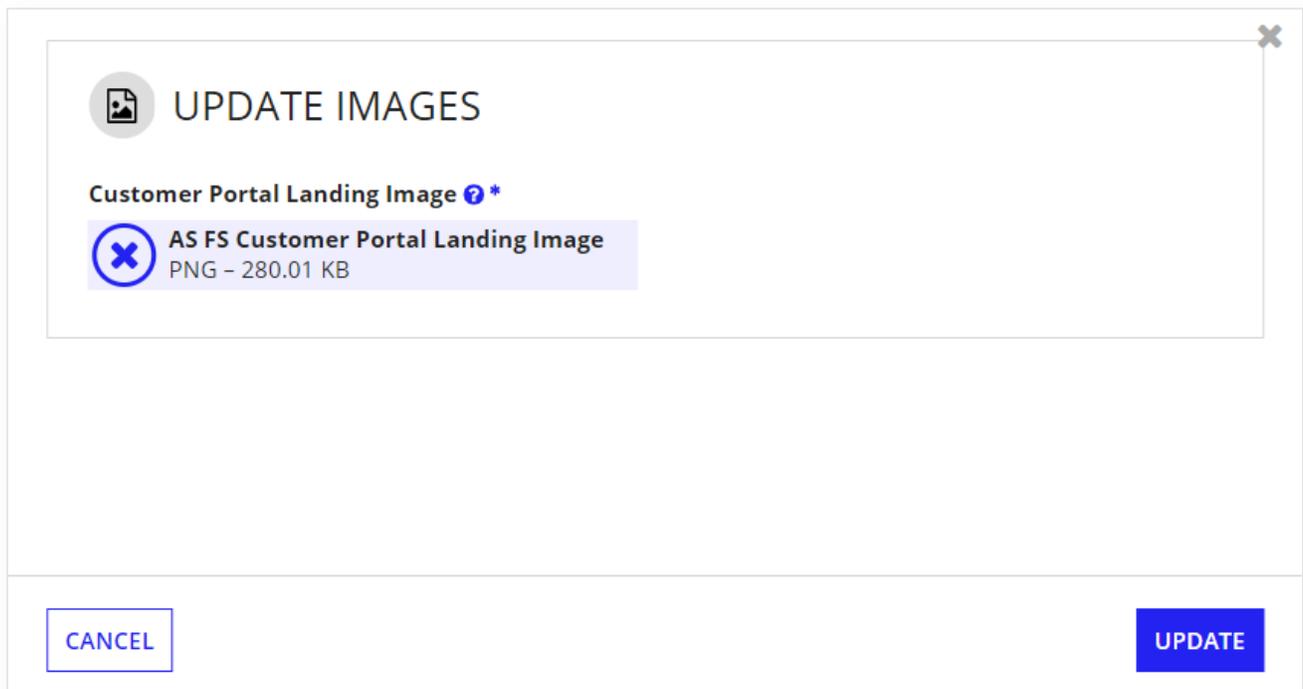
## Images

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.

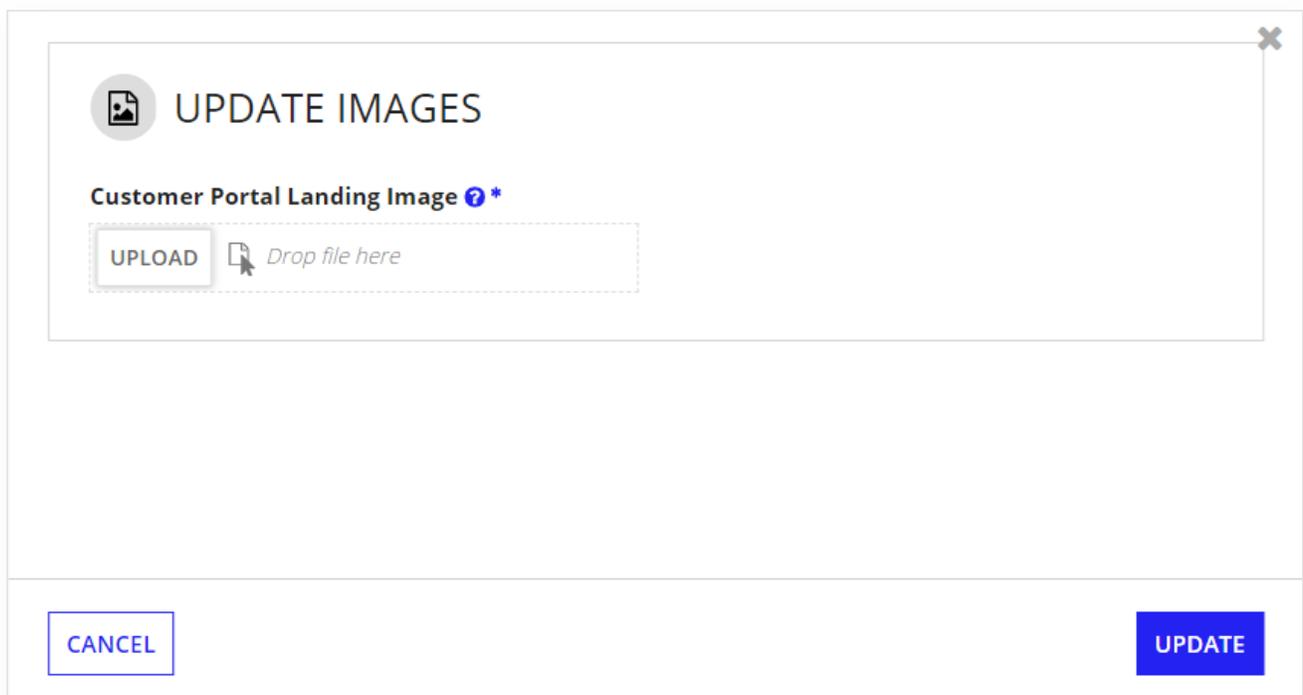
To perform an image customization, navigate to **CONFIGURE & CUSTOMIZE -> IMAGES**. The Images section displays all of the default images that shipped with the solution and are available for customization.



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:

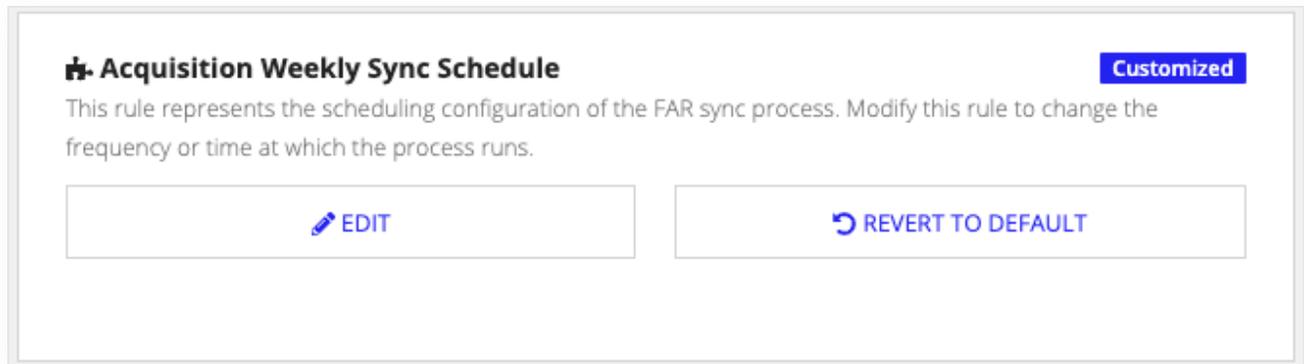
- Adjust conditional content

- 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.



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

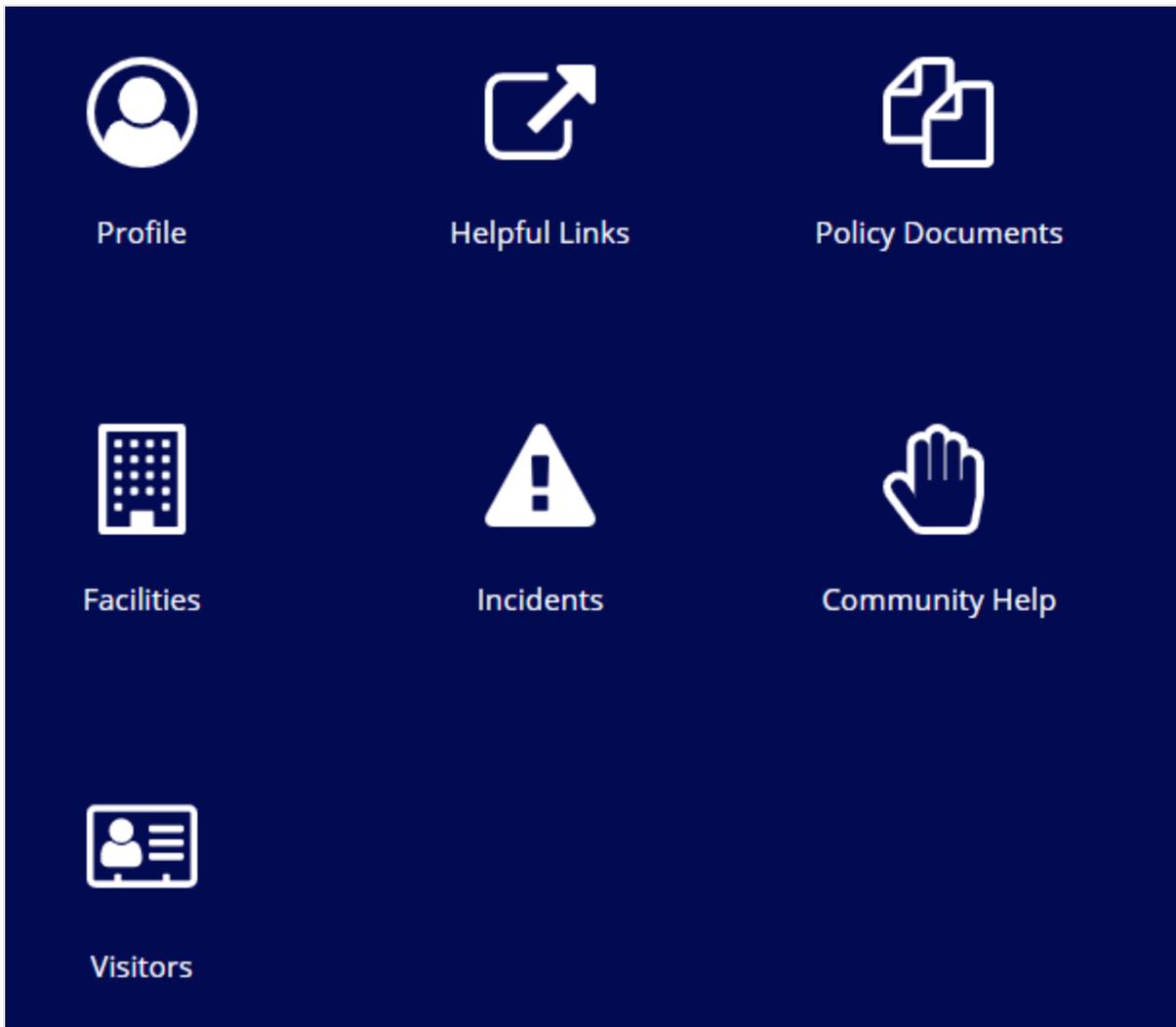
This section outlines the methodology for performing, editing, and reverting functional customizations.

### 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
DESCRIPTION: Renders a custom quick link card at the bottom of the Home Page for each item in the a
Custom quick link cards display after the quick link cards that ship with the solution.
DEFAULT BEHAVIOR: This rule contains no custom quick links by default. Quick links that ship with t
CUSTOMIZATION STEPS: For each custom quick link card you'd like to display on the Home Page, includ
Use the commented Quick Link Template to configure a custom quick link.
PARAMETERS:
generalBundle: A dictionary of key-value pairs for front-end labels. Custom labels can be
added following the Custom Bundle documentation:
https://community.appian.com/w/the-appian-playbook/2228/workforce-safety-v8-1-custom-bundle-file-co
EXPECTED RETURN TYPE: Map?list
*/

```

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     /*Quick Link Template - sample configuration:*/
27     /*!map(*/
28       /*label: "My Link Label",*/
29       /*icon: "icon",*/
30       /*showWhen: true,*/
31       /*link: a!safeLink(uri: "https://www.google.com")*/
32     /*),*/
33     /*Note, the link parameter can return one of: */
34     /*!documentDownloadLink()*/
35     /*!processTaskLink() */
36     /*!recordLink() */
37     /*!reportLink() */
38     /*!safeLink()*/
39     /*!startProcessLink()*/
40     /*!userRecordLink()*/
41     /*Add 0, 1, or multiple links to this array*/
42   }
43 )

```

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.

```

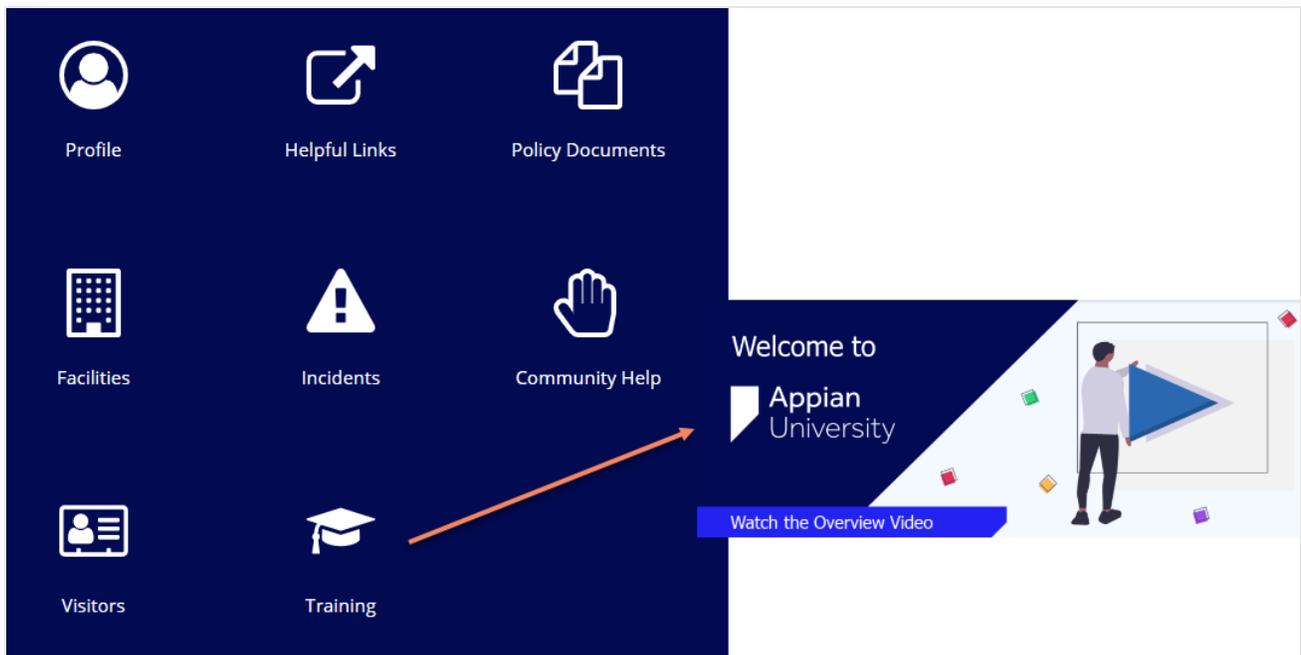
cast(
  'type!{http://www.appian.com/ae/types/2009}Map?list',
  {
    a!map(
      label: "Training",
      icon: "graduation-cap",
      showWhen: true,
      link: a!safeLink(uri: "https://www.appian.com/university")
    )

    /*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**.

## 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

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**.

## 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

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.

## Are you sure?

The "\_default" rule will now execute in lieu of the "\_custom" rule. The previous "\_custom" rule will be appended with a suffix of "\_reverted" and available in the application package for easy deployment.

NO

YES

## 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:

The screenshot shows the Appian Solutions Hub interface. The top navigation bar includes the Appian logo and a "Solutions Hub" dropdown menu with a user profile icon. The left sidebar contains a navigation menu with "Configurations" and "Deployment Guidance" (the latter is highlighted). The main content area displays a deployment guidance form for "Financial Services Suite". The form includes two questions with radio button options:

- Question 1: "Are you deploying Financial Services Suite for the first time?" with "Yes" selected.
- Question 2: "Did you customize Financial Services Suite?" with "Yes" selected.

To the right of the form, a list of four deployment steps is displayed:

1. Finalize customizations using the Solutions Hub in this environment
2. Deploy Financial Services Suite to the target environment following the Financial Services Suite installation guide  
Deploy Financial Services Suite Custom Objects to the target environment using [Compare and Deploy](#). Be sure to add any missing precedents that are part of your customization(s).
3. You can now start using your solution, complete with customizations, in the target environment!
4. (This step is partially obscured by the previous one)

# Clause Automation Home Page Overview

## Introduction

A clause set is a collection of clauses that contractors are required to meet for a solicitation or award contract. From the Government Clause Automation (GCA) home page, users can view a complete list of their clause sets and a list of all clause sets for their organization.

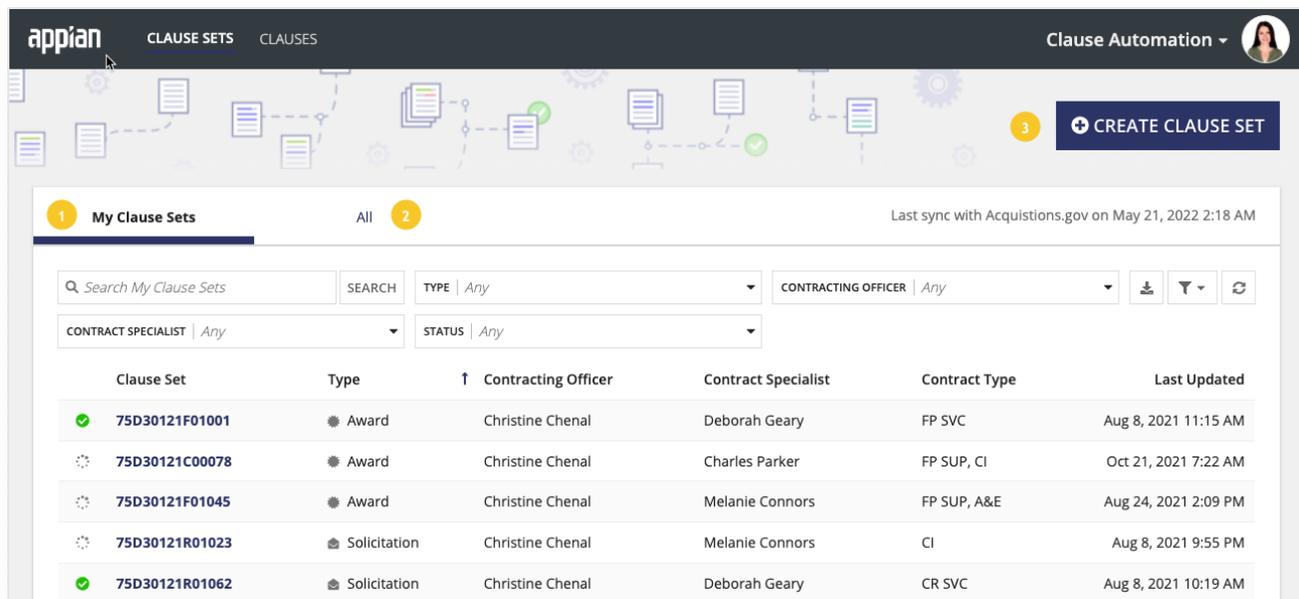
In addition, the home page also allows users to view a complete list of all their organization's imported or created clauses. This is helpful for business users when creating a new clause set for a clause supplemental document. They can easily search all available clauses and select the ones they want manually add to a clause set or select from a list of auto-suggested clauses that GCA provides that are based on answers to questionnaires.

## GCA Site Navigation

The GCA site consists of several pages: **CLAUSE SETS**, **CLAUSES**, **TEMPLATES** and **QUESTIONNAIRES** that provide business users with views of the clause information they need to see and take action on.

The **CLAUSE SETS** page contains several features, including:

1. **My Clause Sets**: Clause sets assigned to the current user.
2. **All**: All clause set records for your organization.
3. **CREATE CLAUSE SET**: Action shortcut that allows users to create a new clause set.
  - o Only users with access can see certain action shortcuts, including **CREATE CLAUSE SET** and **ADD CLAUSE**.



The screenshot shows the Appian interface for 'My Clause Sets'. At the top, there are navigation tabs for 'CLAUSE SETS' and 'CLAUSES', and a user profile for 'Clause Automation'. A 'CREATE CLAUSE SET' button is visible. Below the navigation, there are filters for 'My Clause Sets' and 'All'. The main content area displays a table of clause sets with the following data:

Clause Set	Type	Contracting Officer	Contract Specialist	Contract Type	Last Updated
75D30121F01001	Award	Christine Chenal	Deborah Geary	FP SVC	Aug 8, 2021 11:15 AM
75D30121C00078	Award	Christine Chenal	Charles Parker	FP SUP, CI	Oct 21, 2021 7:22 AM
75D30121F01045	Award	Christine Chenal	Melanie Connors	FP SUP, A&E	Aug 24, 2021 2:09 PM
75D30121R01023	Solicitation	Christine Chenal	Melanie Connors	CI	Aug 8, 2021 9:55 PM
75D30121R01062	Solicitation	Christine Chenal	Deborah Geary	CR SVC	Aug 8, 2021 10:19 AM

## Viewing clause sets and clauses

Clicking **CLAUSE SETS** or **CLAUSES** allows you to see a list of all clause sets or all clauses in your organization and perform certain actions, including:

1. Creating a clause set from the CLAUSE SETS page.
2. Searching and filtering the clause sets or clauses record list.
3. Viewing a summary of information about an individual clause set or individual clause.
4. Exporting the clause sets or clauses record list to Excel
5. Clearing filters and refreshing the record.

**My Clause Sets** All Last sync with Acquisitions.gov on May 21, 2022 2:18 AM

1 **CREATE CLAUSE SET**

2 Search My Clause Sets SEARCH TYPE | Any CONTRACTING OFFICER | Any CONTRACT SPECIALIST | Any STATUS | Any

Clause Set	Type	Contracting Officer	Contract Specialist	Contract Type	Last Updated
75D30121F01001	Award	Christine Chenal	Deborah Geary	FP SVC	Aug 8, 2021 11:15 AM
75D30121C00078	Award	Christine Chenal	Charles Parker	FP SUP, CI	Oct 21, 2021 7:22 AM
75D30121F01045	Award	Christine Chenal	Melanie Connors	FP SUP, A&E	Aug 24, 2021 2:09 PM
75D30121R01023	Solicitation	Christine Chenal	Melanie Connors	CI	Aug 8, 2021 9:55 PM
75D30121R01062	Solicitation	Christine Chenal	Deborah Geary	CR SVC	Aug 8, 2021 10:19 AM

3 4 5

## Start using GCA

Now that you understand how to navigate between the clause set and clause views from the home page, you can start using GCA to view, create, and update clause sets.

# 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](#)

## Providing details

Creating a clause set begins with providing contract details.

## Basic information

To start creating a clause set:

1. Select the **Type**, either Solicitation 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 **Solicitation / 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**.
7. Select the **Contracting Officer's Representative (COR)** (optional).

### Basic Information

**Type \***  
 Solicitation  Award

**Category \***  
 New  Modification

**Solicitation / Award ID \***

**Modification / Amendment Number \***

**Contracting Officer \***

**Contract Specialist \***

**Contracting Officer's Representative (COR)**

## Configuring a clause

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.

### Configuration

**Is this an action off an existing vehicle? \***  
 Yes  No

**Template**

## Selecting contract types

1. Select one or more available contract types.
2. Click > **ADD SELECTED** to add. To remove a contract, click on the contract type under Selected Contract Types and click < **REMOVE SELECTED**.

### Contract Type

Available Contract Types	Selected Contract Types
<b>CR SUP</b> Cost Reimbursement Supply	<b>FP SUP</b> Fixed Price Supply
<b>FP R&amp;D</b> Fixed Price Research & Development	
<b>CR R&amp;D</b> Cost Reimbursement Research & Development	
<b>FP SVC</b> Fixed Price Service	
<b>CR SVC</b> Cost Reimbursement Service	
<b>18 items</b>	

## Entering 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 Start Date** and **Contract End Date**.
2. Select the **Contract Method**.
3. Enter the **Estimated Dollar Amount**.
4. Enter the **PSC** and **NAICS** codes.
5. Enter the **Contract Purpose Detail**.
6. Add any additional contract details.

### Contract Details

<b>Contract Start Date</b>	<b>Contract End Date</b>
<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>
<b>Contract Method</b>	<b>Estimated Dollar Amount</b>
<input type="text" value="--- Select Contract Method ---"/>	<input type="text" value="1000.00"/>
<b>PSC</b>	<b>NAICS Code</b>
<input type="text" value="Enter PSC"/>	<input type="text" value="Enter NAICS Code"/>
<b>Additional Contract Details</b>	
<input type="text"/>	

7. Click **NEXT** to proceed.

## Answering questionnaires

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.

The screenshot shows a questionnaire form with a progress indicator at 0% on the left. The form is titled "Category 1" and contains three questions:

- Question 1: "What other agencies are involved?" with a dropdown menu showing "--- Select ---".
- Question 2: "Is the contract value over \$250,000?" with radio button options for "Yes" and "No".
- Question 3: "What is the priority of this award?" with a dropdown menu showing "--- Select ---".

A "NEXT" button is located in the bottom right corner of the form.

## Reviewing 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.

The screenshot shows the "Create Clause Set" interface with a progress bar at the top indicating the current step is "REVIEW CLAUSES". Below the progress bar, a message states: "The following clauses are required based on the information provided and have been added to the clause set." There are search and filter options for "Search Clauses", "Any Usage", "Any Type", and "Any Source".

Clause	Usage	Section
52.202-1   Definitions. <i>Clause • FAR • Jun 2020</i>	Required	I
52.203-17   Contractor Employee Whistleblower Rights and Requirement To Inform Employees of Whistleblower Rights. <i>Clause • FAR • Jun 2020</i>	Required	I
52.203-5   Covenant Against Contingent Fees. <i>Clause • FAR • May 2014</i>	Required	I
52.203-6   Restrictions on Subcontractor Sales to the Government. <i>Clause • FAR • Jun 2020</i>	Required	I
52.203-6   Alternate I <i>Clause • FAR • Nov 2021</i>	Required	I
52.203-7   Anti-Kickback Procedures. <i>Clause • FAR • Jun 2020</i>	Required	I
52.204-19   Incorporation by Reference of Representations and Certifications. <i>Clause • FAR • Dec 2014</i>	Required	I
52.204-24   Representation Regarding Certain Telecommunications and Video Surveillance Services or Equipment. <i>Provision • FAR • Nov 2021</i>	Required	K
52.204-25   Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment. <i>Clause • FAR • Nov 2021</i>	Required	I
52.204-26   Covered Telecommunications Equipment or Services-Representation. <i>Provision • FAR • Oct 2020</i>	Required	K

At the bottom of the interface, there are "BACK", "CANCEL", "SAVE AND CLOSE", and "NEXT" buttons. A pagination indicator shows "1 - 10 of 32".

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

# Adding 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**. If any templates or rules excluded clauses, they can be viewed in the **Additional Clauses** list with the **Excluded Clauses Only** filter, and manually added back in.

Select any additional clauses you would like to add, and click **GENERATE**.

1 PROVIDE DETAILS   2 ANSWER QUESTIONNAIRE   3 REVIEW CLAUSES   **4 ADD CLAUSES**   5 GENERATION COMPLETE

### Suggested Clauses

Following clauses are suggested based on the contract details 0 suggested clauses selected

Search Clauses  --- Any Usage ---  --- Any Type ---  --- Any Source ---

<input type="checkbox"/> Clause	Usage	Section
<input type="checkbox"/> 52.204-2   Alternate I <small>Clause • FAR • Apr 1984</small>	Applicable	I
<input type="checkbox"/> 52.204-2   Alternate II <small>Clause • FAR • Apr 1984</small>	Applicable	I
<input type="checkbox"/> 52.204-21   Basic Safeguarding of Covered Contractor Information Systems. <small>Clause • FAR • Nov 2021</small>	Applicable	I
<input type="checkbox"/> 52.204-23   Prohibition on Contracting for Hardware, Software, and Services Developed or Provided by Kaspersky Lab and Other Covered Entities. <small>Clause • FAR • Nov 2021</small>	Applicable	I
<input type="checkbox"/> 52.204-4   Printed or Copied Double-Sided on Postconsumer Fiber Content Paper. <small>Clause • FAR • May 2011</small>	Applicable	I

<< < 16 - 20 of 458 > >>

### 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 ---  Excluded clauses only

<input type="checkbox"/> Clause	Usage	Section
<input type="checkbox"/> 52.211-6   Brand Name or Equal. <small>Provision • FAR • Aug 1999</small>	-	L
<input type="checkbox"/> 52.211-7   Alternatives to Government-Unique Standards. <small>Provision • FAR • Nov 1999</small>	-	L
<input type="checkbox"/> 52.212-1   Instructions to Offerors-Commercial Items. <small>Provision • FAR • Nov 2021</small>	Excluded	NA
<input type="checkbox"/> 52.212-2   Evaluation-Commercial Items. <small>Provision • FAR • Nov 2021</small>	Excluded	NA
<input type="checkbox"/> 52.212-3   Offeror Representations and Certifications-Commercial Items. <small>Provision • FAR • Nov 2021</small>	Excluded	NA

<< < 36 - 40 of 318 > >>

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.

1 PROVIDE DETAILS   2 ANSWER QUESTIONNAIRE   3 REVIEW CLAUSES   4 ADD CLAUSES   **5 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.

# Managing Clause Sets

## Managing clause sets

After you [create a clause set](#), GCA makes it simple and easy to manage existing clause sets directly from the Clause Sets list by allowing you to view additional information about the clause set, and take action on the clause set if you are a privileged business user.

## Viewing a clause set

To view an individual clause set, simply locate and click the clause set you want to view in the Clause Set list. This will take you to the Clause Set Summary view where you can see details about the clause set, contract information, and any clauses applied to the clause set.

The screenshot displays the Appian Clause Automation interface for a specific clause set (75D30121F01045). The interface is divided into several sections:

- Header:** Includes the Appian logo, navigation tabs for 'CLAUSE SETS' and 'CLAUSES', and a user profile icon with the text 'Clause Automation'.
- Clause Set ID:** 75D30121F01045, with buttons for 'FINALIZE CLAUSE SET', 'UPDATE CLAUSE SET', and 'VALIDATE CLAUSE SET'.
- Summary:** A tabbed interface with 'Summary' selected, and other tabs for 'Questionnaire', 'Excluded Clauses', 'Clause Set History', and 'Related Actions'.
- Details:** A sidebar on the left containing information such as 'Type (Category)', 'Contracting Officer', 'Contract Specialist', 'Contracting Officer's Representative (COR)', 'Action of Existing Vehicle', 'Template', 'Validation Status', 'Contract Information', 'Contract Type', 'Contract Method', 'Contract Start Date', 'Contract End Date', 'Estimated Dollar Amount', 'PSC', 'NAICS Code', and 'Additional Contract Details'.
- Applied Clauses:** A table listing clauses applied to the set. The table has columns for 'Clause', 'Usage', 'Section', 'Fill-ins', 'Editable', 'Included By', and 'Added Through'. Each row represents a clause with its ID, description, and status (e.g., 'Required').

Clause	Usage	Section	Fill-ins	Editable	Included By	Added Through
352.203-70   Anti-Lobbying. <i>Clause • HHSAR • Dec 2015</i>	Required	I	No	No	IBR	Template
352.222-70   Contractor Cooperation in Equal Employment Opportunity Investigations. <i>Clause • HHSAR • December 18 2015</i>	Required	I	No	No	IBR	Template
352.227-14   Rights in Data - Exceptional Circumstances. <i>Clause • HHSAR • September 2014</i>	Required	I	No	No	IBR	Template
352.227-70   Publications and Publicity. <i>Clause • HHSAR • December 18 2015</i>	Required	I	No	No	IBR	Template
352.237-75   Key Personnel. <i>Clause • HHSAR • Dec 2015</i>	Required	H	No	No	Full Text	Template
52.202-1   Definitions. <i>Clause • FAR • Jun 2020</i>	Required	I	No	No	IBR	FAR Matrix
52.203-10   Price or Fee Adjustment for Illegal or Improper Activity. <i>Clause • FAR • May 2014</i>	Required	I	No	No	IBR	Template
52.203-11   Certification and Disclosure Regarding Payments to Influence Certain Federal Transactions. <i>Provision • FAR • Sept 2007</i>	Required	K	No	No	IBR	Questionnaire
52.203-12   Limitation on Payments to Influence Certain Federal Transactions. <i>Clause • FAR • Jun 2020</i>	Required	I	No	No	IBR	Template
52.203-17   Contractor Employee Whistleblower Rights and Requirement To Inform Employees of Whistleblower Rights. <i>Clause • FAR • Jun 2020</i>	Required	I	No	No	IBR	FAR Matrix
52.203-19   Prohibition on Requiring Certain Internal Confidentiality Agreements or Statements. <i>Clause • FAR</i>	Required	I	-	No	IBR	Template
52.203-3   Gratuities. <i>Clause • FAR • Apr 1984</i>	Required	I	No	No	IBR	Template
52.203-5   Covenant Against Contingent Fees. <i>Clause • FAR • May 2014</i>	Required	I	No	No	IBR	FAR Matrix
52.203-6   Alternates I.						

## Viewing a clause in a clause set

From the Clause Set Summary view, you can view a complete list of all clauses applied to the clause set. To view an individual clause, click the **ellipsis** icon associated with the clause you want to view and click **View Clause**.

Clause	Usage	Section	Fill-ins	Editable	Included By	Added Through
52.232-12   Advance Payments. <i>Clause • FAR • May 2001</i>	Applicable	I	Yes	Yes	Full Text	FAR Matrix
52.232-12   Alternate I <i>Clause • FAR • Apr 1984</i>	Applicable	I	Yes	Yes	Full Text	FAR Matrix
52.232-39   Unenforceability of Unauthorized Obligations. <i>Clause • FAR • Jun 2013</i>	Required	I	-	No	IBR	FAR Matrix
52.233-2   Service of Protest. <i>Provision • FAR • Sep 2006</i>		L	Yes	No	Full Text	Manually
52.233-3   Alternate I <i>Clause • FAR • Jun 1985</i>	Required	I	-	Yes	IBR	FAR Matrix
52.233-3   Protest after Award. <i>Clause • FAR • Aug 1996</i>	Required	I	-	Yes	IBR	FAR Matrix
52.233-4   Applicable Law for Breach of Contract Claim. <i>Clause • FAR • Oct 2004</i>	Required	I	-	No	IBR	FAR Matrix
52.244-6   Subcontracts for Commercial Items. <i>Clause • FAR • Jan 2022</i>	Required	I	-	No	IBR	FAR Matrix

- View Clause
- Complete Fill-ins
- Edit Clause
- Remove Clause

The View Clause dialog will display all pertinent information about the clause, including:

- Clause Name and Identifier
- Prescription Number
- Prescription Text
- Clause Text

## View Clause ✕

**Clause**  
52.232-12 | Advance Payments.

**Prescription Number**  
32.412

**Prescription Text**  
**32.412 Contract clause.**

(a) The contracting officer shall insert the clause at 52.232-12, Advance Payments, in solicitations and contracts under which the Government will provide advance payments, except as provided in 32.412(b).

(b) If the agency desires to waive the countersignature requirement because of the contractor's financial strength, good performance record, and favorable experience concerning cost disallowances, the contracting officer shall use the clause with its Alternate I.

&nb

[...more](#)

**Clause Text**  
**52.232-12 Advance Payments.**

As prescribed in 32.412(a), insert the following clause:  
Advance Payments (May 2001)

(a) *Requirements for payment.* Advance payments will be made under this contract (1) upon submission of properly certified invoices or vouchers by the Contractor, and approval by the administering office, \_\_\_\_\_ [insert the name of the office designated under agency procedures], or (2) under a letter of credit. The amount of the invoice or voucher submitted plus all advance payments previously approved shall not exceed \$\_\_\_\_\_. If a letter of credit is used, the Contractor shall withdraw cash only when needed for disbursements acceptable under this contract and report cash disbursements and balances as required by the administering office. The Contractor shall apply terms similar to this clause to any advance payments to subcontractors.

(b) *Special account.* Until (1) the Contractor has liquidated all advance payments made under the contract and related interest charges and (2) the administering office has approved in writing the release of any funds due and payable to the Contractor, all advance payments and other payments under this

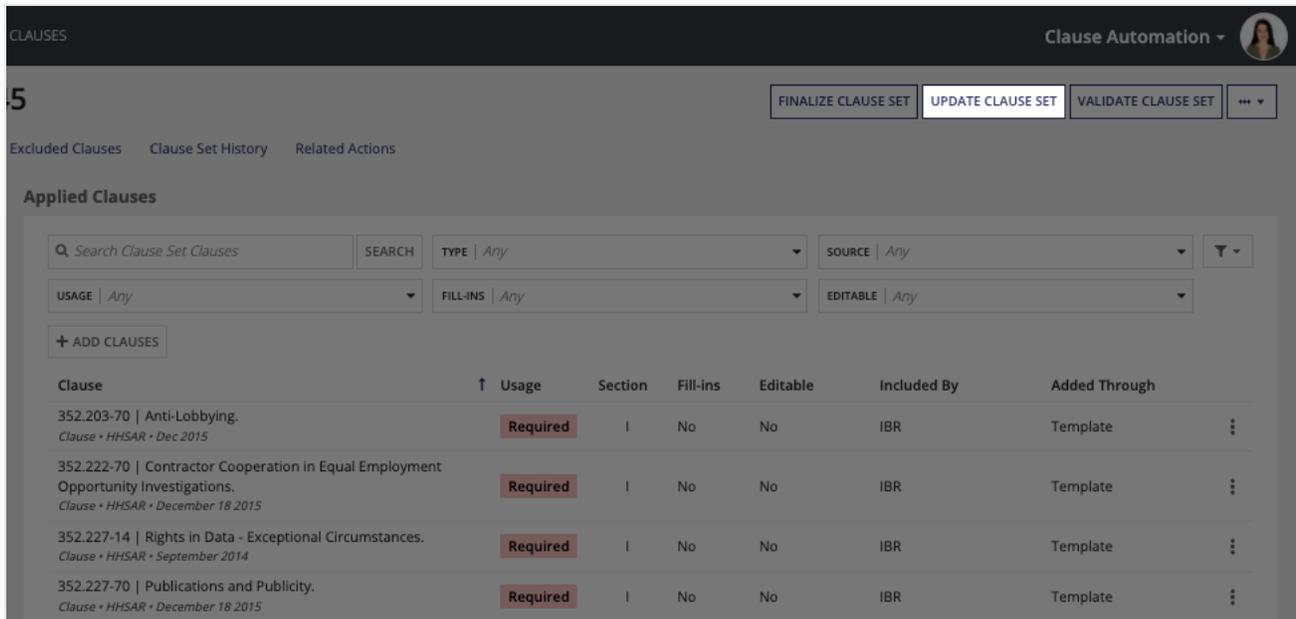
CLOSE

## Taking action on a clause set

Privileged users, which is a specific user group in GCA, can perform certain actions like create rules, templates, and questionnaires. Contracting officers and contract specialists can update, validate, and finalize the clause sets assigned to them.

## Updating clause sets

When you need to update an existing clause, GCA walks you through a guided workflow that allows you to update the clause set details and questionnaire answers, review clauses assigned to the clause set, and add additional clauses if needed. After completing each step in the guided workflow, you can generate an updated clause set that matches the modifications you made.



The screenshot shows the 'CLAUSES' interface in GCA. At the top, there are navigation tabs: 'Excluded Clauses', 'Clause Set History', and 'Related Actions'. The 'Applied Clauses' section is active, displaying a table of clauses. The table has columns for 'Clause', 'Usage', 'Section', 'Fill-ins', 'Editable', 'Included By', and 'Added Through'. The 'Usage' column for all listed clauses is 'Required'. The 'Section' column for all is 'I'. The 'Fill-ins' and 'Editable' columns for all are 'No'. The 'Included By' column for all is 'IBR'. The 'Added Through' column for all is 'Template'. There are three rows of clauses listed:

Clause	Usage	Section	Fill-ins	Editable	Included By	Added Through
352.203-70   Anti-Lobbying. <i>Clause • HHSAR • Dec 2015</i>	Required	I	No	No	IBR	Template
352.222-70   Contractor Cooperation in Equal Employment Opportunity Investigations. <i>Clause • HHSAR • December 18 2015</i>	Required	I	No	No	IBR	Template
352.227-14   Rights in Data - Exceptional Circumstances. <i>Clause • HHSAR • September 2014</i>	Required	I	No	No	IBR	Template
352.227-70   Publications and Publicity. <i>Clause • HHSAR • December 18 2015</i>	Required	I	No	No	IBR	Template

Note that any updates you make to a clause in the clause set will override the existing clause and any information associated with it.

To update a clause set:

1. From the **Clause Sets** list, locate and click the clause set you want to update to drill down into the clause set summary view.
2. From the Summary view, click **UPDATE CLAUSE SET** to open the **Update Clause Set** workflow.

## Update Clause Set

[PROVIDE DETAILS](#) | [2 ANSWER QUESTIONNAIRE](#) | [3 REVIEW CLAUSES](#) | [4 ADD CLAUSES](#) | [5 GENERATION COMPLETE](#)

⚠ The clause set has existing clauses. Updates to the clause set will override existing clauses and any information associated with them.

### Basic Information

**Type \***  
 Solicitation  Award

**Category \***  
 New  Modification

**Solicitation / Award ID \***

**Contracting Officer \***  **Contract Specialist**  **Contracting Officer's Representative (COR)**  Yes  No

**Template**

CANCEL [SAVE AND CLOSE](#) [NEXT](#)

**What is a clause set?**

- Clause set is a collection of clauses.
- Based on the information provided, required clauses will be added to the clause set.
- Additional clauses can be selected and added to the clause set as well.

3. In the **PROVIDE DETAILS** step, you can update the following information:

- **Basic Information**
  - **Type:** Options include *Solicitation* and *Award*.
  - **Category:** Options include *New* or *Modification*.
  - **Assignees:** You can update the contracting officer, contract specialist, contracting officer's representative, or all three. Note that you must select either a contracting officer or contracting specialist as a contact or assignee.
- **Configuration**
  - **Is this an action off an existing vehicle:** Indicate if this is an action off an existing vehicle by selecting *Yes* or *No*.
  - **Template:** You can update the template to associate with the clause set by selecting a new template from the **Template** dropdown menu. Note that the template you select affects which clauses are added to the clause set.
- **Contract Type**
- **Available Contract Types:** Select the contract types relevant to the clause set.
- **Selected Contract Types:** If needed, remove any selected contract types.
- **Contract Details**
  - **Contract Start Date:** If the contract start date has changed, update this field.
  - **Contract End Date:** If the contract end date has changed, update this field.
  - **Contract Method:** Options include *Simplified Acquisition Procedures (SAP)*, *Negotiated contract (NEG CONT)*, and *\_Solicited Bid (SLD BID)*.
  - **Estimated Dollar Amount:** If the contract award amount has changed, update this field.
  - **PSC:** PSC code associated with the contract award or clause set.
  - **NAICS Code:** NAICS code associated with the contract award or clause set.
  - **Additional Contract Details**

4. Click **NEXT**.

5. In the **ANSWER QUESTIONNAIRE** step, update the questionnaire answers if they have changed and click **NEXT**.

6. Review the clauses assigned to the clause set. You can search the clause list for a specific clause or filter the clause list by Usage, Type, or Source.

- 7. Add additional clauses that were not automatically added to the clause set. You can search the clause list to find a specific clause and filter the list by Usage, Type, or Source.
  - o Note that if any templates or rules exclude clauses, they can be viewed in the Additional Clauses list with the Excluded Clauses Only filter, and manually added back in.
- 8. After completing all updates, click **GENERATE** to update the clause set with your changes.

## Validating clause sets

GCA will run a validation on your clause sets and provide a list of all incomplete clauses, clauses with missing fill-ins, and clauses with incorrect information. When you initiate a clause set validation, a banner at the top of the Validate Clause Set form will indicate that the validate is complete and the number of errors found.

### Validate Clause Set

✕

**Clause set validation completed. 30 errors were found.**

**Clause with Updates**

The following clauses have an updated version in the system. Retain the existing clause or update to the latest one

Type	Clauses	Effective Date	Last Updated	Action
Existing	52.203-5   Covenant Against Contingent Fees.	May 2014	Mar 16, 2022 10:45 PM	<b>Retain</b>
New	52.203-5   Covenant Against Contingent Fees.	May 2015	Mar 17, 2022 1:10 AM	<b>Update</b>

**Clause with Errors**

The following clauses have missing information. Review the clauses with errors in the clause set summary and mark them as complete.

Clauses	Error
52.204-26   Covered Telecommunications Equipment or Services-Representation.	Missing Fill-in
52.212-5   Alternate II	Incomplete Clause
52.204-24   Representation Regarding Certain Telecommunications and Video Surveillance Services or Equipment.	Missing Fill-in
52.233-3   Alternate I	Incomplete Clause
52.233-3   Protest after Award.	Incomplete Clause
52.222-50   Combating Trafficking in Persons.	Incomplete Clause

The validation will also inform you of any updated clauses in the system. GCA identifies updated clause versions and lists them in the Clause with Updates section. This gives you an opportunity to update to the latest clause version or retain the existing clause in the clause set.

Although IBR clauses do not include full text in the final PDF version of the clause, you can still manually edit these clauses using the clause editor if they show up in the validation report.

See [Editing Clauses in a Clause Set](#) for more information about the types of clause information you can edit and the edit methods.

To validate a clause set:

1. From the **Clause Sets** list, locate and click the clause set you want to update to drill down into the clause set summary view.
2. From the Summary view, click **VALIDATE CLAUSE SET** to open the **Validate Clause Set** form.
3. If there are clauses with updates, click **Update** to get the latest version of the clause or click **Retain** to retain the existing clause in the clause set.
4. In the **Clause with Errors** section, review the list of clauses with missing fill-ins or marked as incomplete. Go to the Clause Set Summary view and manually edit each clause or use **Missing Fill-in** to use GCA's auto suggestions to complete missing fill-in data.
5. Click **SAVE**.

After running a validation on a clause set, you may need to [edit clauses in the clause set](#) to complete any missing fill-ins or correct any errors.

## Finalizing clause sets

After updating all the clauses in your clause set and validating that there are no remaining errors or incomplete clauses, you can finalize the clause set.

The screenshot displays the 'Applied Clauses' section of the Clause Automation interface. At the top, there are navigation tabs: 'Excluded Clauses', 'Clause Set History', and 'Related Actions'. Below these are search and filter controls, including a search bar and dropdown menus for 'TYPE', 'SOURCE', 'USAGE', 'FILL-INS', and 'EDITABLE'. A '+ ADD CLAUSES' button is also present. The main area contains a table with the following columns: Clause, Usage, Section, Fill-ins, Editable, Included By, and Added Through. The 'Usage' column for all listed clauses is 'Required'.

Clause	Usage	Section	Fill-ins	Editable	Included By	Added Through
352.203-70   Anti-Lobbying. <i>Clause • HHSAR • Dec 2015</i>	Required	I	No	No	IBR	Template
352.222-70   Contractor Cooperation in Equal Employment Opportunity Investigations. <i>Clause • HHSAR • December 18 2015</i>	Required	I	No	No	IBR	Template
352.227-14   Rights in Data - Exceptional Circumstances. <i>Clause • HHSAR • September 2014</i>	Required	I	No	No	IBR	Template
352.227-70   Publications and Publicity. <i>Clause • HHSAR • December 18 2015</i>	Required	I	No	No	IBR	Template

Finalizing a clause set indicates that it is complete and ready to add to a supplement. Only finalize a clause set when you are sure it is complete and you have no plans to perform future edits or updates. Finalized clauses are no longer available for edits.

## Finalize Clause Set | DFH8800192

You won't be able to edit the clause set once it is finalized. Are you sure you want to finalize the clause set?

CANCEL

FINALIZE

GCA will automatically [run a validation](#) on any finalized clause sets to ensure there are no incomplete clauses or clauses with missing fill-ins. During validation, if any errors are identified in the applied clauses, the validation and finalized clause set process will both fail. The Clause Set History tab in the clause set record will log both failed processes with a timestamp. You will need to fix the errors by [editing the clauses](#) that require attention.

To finalize a clause:

1. From the **Clause Sets** list, locate and click the clause set you want to update to drill down into the clause set summary view.
2. From the Summary view, click **FINALIZE CLAUSE SET** to open the **Finalize Clause Set** workflow.
  - o **Note:** If clause errors or updates are identified during automatic validation, you will need to edit or update these clauses before finalizing the clause set.

### Finalize Clause Set

16 validation errors were found. Clause set could not be finalized. Resolve errors and execute Finalize again.

**Clause with Updates**  
The following clauses have an updated version in the system. Retain the existing clause or update to the latest one

Type	Clauses	Effective Date	Last Updated	Action
Existing	52.203-5   Covenant Against Contingent Fees.	May 2014	Feb 10, 2022 9:09 AM	Retain
New	52.203-5   Covenant Against Contingent Fees.	May 2015	Mar 17, 2022 1:10 AM	Update

**Clause with Errors**  
The following clauses have missing information. Review the clauses with errors in the clause set summary and mark them as complete.

Clauses	Error
52.243-1   Alternate V	Incomplete Clause
52.243-1   Alternate IV	Incomplete Clause
52.243-1   Alternate III	Incomplete Clause
52.243-1   Alternate II	Incomplete Clause
52.243-1   Alternate I	Incomplete Clause
52.243-1   Changes-Fixed-Price.	Incomplete Clause
52.233-3   Alternate I	Incomplete Clause

SAVE

3. Click **SAVE**.

# Editing Clauses in a Clause Set

## Introduction

At some point, you may need to update the clauses in a [clause set](#) you previously created. This may involve completing missing fill-ins in one or more clauses or entering required information into clauses that have been identified as incomplete during a clause set validation. GCA provides flexible tools and workflows that allow you to quickly edit clauses in a clause set, which reduces the time it takes you to finalize a clause set.

To get started editing a clause, you may want to [perform a validation](#) on your clause set to identify any clauses that need your attention. Alternatively, you can view, search, or filter the Applied Clauses list from the Clause Set Summary page to locate the clause or group of clauses you need to update.

## Editing a clause in a clause set

There are basically two types of clause edits that you can perform: *fill-ins* edits and what we're calling *non fill-in* edits.

Fill-ins include any text, tables, or checkboxes within a clause that a contracting officer is required to complete with information that applies to their specific acquisition. Any edits that cannot be defined as one of these fill-in types, is a non fill-in edit.

For many clauses, GCA provides the flexibility of deciding between manually editing clause fill-ins using GCA's built-in clause editor or using the Complete Fill-ins feature, which is GCA's editing workflow that includes intelligent automation. The Complete Fill-ins workflow allows you to quickly edit clause fill-ins, reducing the time it takes to update a clause set. Non fill-ins do not leverage GCA's intelligent capability. You must manually edit clause sections using the clause editor. For example, if you need to add or delete an entire paragraph in a clause, you must perform a manual edit.

From the Applied Clauses list, you can quickly and easily determine which clauses utilize the Complete Fill-in workflow and which clauses you must manually edit using the clause editor. If the value for the Fill-ins column for a clauses is *Yes*, you can edit the clause using the Complete Fill-in workflow. If the value for the Fill-ins column for a clauses is *No* or designated with an empty state, you must manually edit the clause. Note that if both columns have a *No* value or an *empty* state, you cannot manually edit the clause using the clause editor. The only exception to this rule is if the Editable column was manually set to *No* by a user in a previous edit.

The following table lists the available options for editing fill-ins and non fill-ins based on the values in the Fill-in column and Editable column for the associated clause.

Clause Edit Type	Applied Clauses List		
	Fill-in Column*	Editable Column*	Available Options
Fill-in	Yes	Yes	<ul style="list-style-type: none"> <li>• Access to the Complete Fill-in Workflow</li> <li>• Access to the Clause Editor</li> <li>• Access to Remove Clause</li> <li>• Access to View Clause</li> </ul>
	Yes	No	<ul style="list-style-type: none"> <li>• Access to the Complete Fill-in Workflow</li> <li>• Access to the Clause Editor</li> <li>• Access to Remove Clause</li> <li>• Access to View Clause</li> </ul>
	No	Yes	<ul style="list-style-type: none"> <li>• Access to the Clause Editor</li> <li>• Access to Remove Clause</li> <li>• Access to View Clause</li> </ul>
	No	No	<ul style="list-style-type: none"> <li>• Access to View Clause</li> <li>• Access to Remove Clause</li> </ul>

\* An *empty* state in the **Fill-in** or **Editable** column is the same as a *No* value. When either column value is manually set to *No* or an *empty* state by a user in a previous edit, users can continue to edit the clause using the clause editor.

Note that any edits you make to a clause in the clause set will override the existing clause and any information associated with it.

### Editing a clause with automated fill-ins

The Complete Fill-ins feature is an automated clause fill-in workflow that allows you to complete two types of clause fill-ins, including:

- **Quick Fills:** Allows you to review a list of auto suggested text selections GCA provided. Select the correct auto suggested text to complete the highlighted fill-in.
- **Checkboxes:** Allows you to type an **X** to complete a highlighted checkbox requirement for a clause fill-in.

After locating the clause you want to edit in the Applied Clauses list, you can use Complete Fill-ins (if available) to quickly edit the clause fill-ins.

appian CLAUSE SETS CLAUSES TEMPLATES QUESTIONNAIRES Clause Automation 

JPOJPO22D0001 FINALIZE CLAUSE SET UPDATE CLAUSE SET VALIDATE CLAUSE SET ...

Summary Questionnaire Excluded Clauses Clause Set History Related Actions

**Details**

**Type (Category)**  
Award (New)

**Contracting Officer**  
GAM Admin

**Contract Specialist**  
-

**Contracting Officer's Representative (COR)**  
-

**Action of Existing Vehicle**  
No

**Template**  
Negotiated Fixed-price Service Contract

**Validation Status**  
Validation Pending

---

**Contract Information**

**Contract Purpose**  
Commercial

**Contract Purpose Type**  
Services (SVC)

**Contract Purpose Details**

**Applied Clauses**

Search Clause Set Clauses SEARCH TYPE | Any SOURCE | Any

USAGE | Any FILL-INS | Any EDITABLE | Any

+ ADD CLAUSES

Clause	Usage	Section	Fill-ins	Editable	Included By	Added Through	
52.215-19   Notification of Ownership Changes. <i>Clause • FAR • Oct 1997</i>	Required	I	-	No	IBR	Template	⋮
52.215-2   Audit and Records-Negotiation. <i>Clause • FAR • Jun 2020</i>	Required	I	-	Yes ⌵	IBR	Template	⋮
52.215-21   Requirements for Certified Cost or Pricing Data and Data Other Than Certified Cost or Pricing Data-Modifications. <i>Clause • FAR • Nov 2021</i>	Required	I	Yes ⌵	Yes ⌵	IBR	Template	⋮
52.215-8   Order of Precedence-Uniform Contract Format. <i>Clause • FAR • Oct 1997</i>	Required	I	-	No	IBR	Template	⋮
52.216-24   Limitation of Government Liability. <i>Clause • FAR • Apr 1984</i>	Required	I	Yes ⌵	No	Full Text	FAR Matrix	⋮
52.216-25   Contract Definitionization. <i>Clause • FAR • Oct 2010</i>	Required	I	Yes ⌵	Yes ⌵	Full Text	FAR Matrix	⋮
52.216-25   Alternate I <i>Clause • FAR • Apr 1984</i>	Required	I	Yes ⌵	Yes ⌵	Full Text	FAR Matrix	⋮
52.219-14   Limitations on Subcontracting. <i>Clause • FAR • Sep 2021</i>	Required	I	Yes ⌵	No	IBR	Template	⋮
52.219-16   Liquidated Damages-Subcontracting Plan. <i>Clause • FAR • Sep 2021</i>	Required	I	No	No	IBR	Template	⋮

- View Clause
- Complete Fill-ins
- Edit Clause
- Remove Clause



To help you quickly determine which fill-ins you need to complete, the Complete Fill-in workflow highlights the fill-ins. The workflow also displays help text that describes the current fill-in and automatically determines how much clause text to show before and after each fill-in blank to ensure that you have sufficient context to enter the correct answers.

The Quick Fill feature in the Complete Fill-in workflow allows you to complete the highlighted fill-ins with data retrieved from the contract details you previously entered, reducing the time it takes to edit your clauses.

unknown when the solicitation was issued. In addition to places or requested for the following: \_\_\_\_\_ [insert places or areas]. The so in writing by \_\_\_\_\_ [insert time and date].

### Insert time and date

4/8/2022 5pm

### Quick Fill

Choose a text from the list to insert

Contract Purpose

Non-commercial



Contract Purpose Type

Utility Services (UTL SVC)



Contract Method

Solicited Bid (SLD BID)



Contract Start Date

4/4/2022



Contract End Date

4/8/2022



< 6 - 10 of 13 >

To edit a clause using Complete Fill-ins:

1. Click the **ellipsis** icon associated with the clause you want to edit and click **Complete Fill-ins** to open the **Clause Fill-ins** workflow.
2.
  - o Under the **Quick Fill** section, review the auto suggested text selections GCA provided and click the **+ plus** icon next to the correct text selection to complete the highlighted fill-in.

### Clause Fill-ins

2/2 Completed

**Insert time and date**  
52.222-49 Service Contract Labor Standards-Place of Performance Unknown. [View Clause](#)

Service Contract Labor Standards-Place of Performance Unknown (May 2014)

(a) This contract is subject to the Service Contract Labor Standards statute, and the place of performance was unknown when the solicitation was issued. In addition to places or areas identified in wage determinations, if any, attached to the solicitation, wage determinations have also been requested for the following: \_\_\_\_\_ [insert places or areas]. The Contracting Officer will request wage determinations for additional places or areas of performance if asked to do so in writing by \_\_\_\_\_ [insert time and date].

**Insert time and date**  
4/8/2022 5pm

**Quick Fill**  
Choose a text from the list to insert

Contract Purpose  
Non-commercial +

Contract Purpose Type  
Utility Services (UTL SVC) +

Contract Method  
Solicited Bid (SLD BID) +

Contract Start Date  
4/4/2022 +

Contract End Date  
4/8/2022 +

< 6 - 10 of 13 >

BACK CANCEL SAVE AS DRAFT **MARK AS COMPLETE**

3. Click **MARK AS COMPLETE**.

## Manually editing a clause

Manually editing clauses in a clause set is also easy with GCA's Edit Clause editor.

### Edit Clause

Clause 52.216-24 | Limitation of Government Liability.

Clause Text \*



#### 52.216-24 Limitation of Government Liability.

As prescribed in 16.603-4(b)(2), insert the following clause in solicitations and contracts when a letter contract is contemplated:

Limitation of Government Liability (Apr 1984)

(a) In performing this contract, the Contractor is not authorized to make expenditures or incur obligations exceeding \_\_\_\_\_ dollars.

(b) The maximum amount for which the Government shall be liable if this contract is terminated is \_\_\_\_\_ dollars.

(End of clause)

To manually edit a clause:

1. Click the **ellipsis** icon associated with the clause you want to edit and click **Edit Clause** to open the **Edit Clause** editor.
2. Update clause as needed.
3. When finished, click **MARK AS COMPLETE**.

Clicking **SAVE AS DRAFT**, saves your current edits but keeps the clause open so that you can continue updating it at a later date. When you click **MARK AS COMPLETE**, you are indicating that you have updated the clause and completed all fill-ins. Note that this action does not finalize the clause in the clause set, which can only be performed by [finalizing the clause set](#). If needed, you can still edit a clause marked as *complete* until the clause set it is assigned too is finalized.

## Removing a clause from a clause set

You can also remove a clause from a clause set if it is no longer needed but you must select a reason and provide a justification. Reasons include:

- Change in work priorities
- Dependent tasks did not complete on time
- Other priorities took precedence
- Part of larger shift in schedule
- Work taking longer than originally planned

To remove a clause:

1. Click the **ellipsis** icon associated with the clause you want to edit and click **Remove Clause** to open the **Remove Clause** form.

2. In the **Reason** dropdown menu, select a reason for removing the clause.
3. In the **Justification** text box, enter your justification for removing the clause.
4. Click **REMOVE**.

### Remove Clause

<b>Clause</b> 52.202-1   Definitions.		
<b>Type</b> Clause	<b>Effective Date</b> Jun 2020	<b>Section</b> I
<b>Prescription Number</b> 2.201	<b>Required</b>	
<b>Prescription Text</b> <b>2.201 Contract clause.</b> Insert the clause at 52.202-1, Definitions, in solicitations and contracts that exceed the simplified acquisition threshold.		

**Are you sure you want to remove this clause from the clause set?**  
To remove the required clause, provide the justification for removal.

**Reason \***  
Change in work priorities

**Justification**  
This clause is no longer required as part of the award contract.

# Managing Clauses

## Introduction

Government Clause Management ships with a clause database that users can browse and update directly from the Clauses tab. When creating a clause set for a contract, users can search this clause database, identify and select specific clauses, and add them to a clause set.

appian CLAUSE SETS **CLAUSES** TEMPLATES QUESTIONNAIRES Clause Automation 

### Clauses

SEARCH
 TYPE | Any
SOURCE | Any
EFFECTIVE DATE | Any
Download
Filter
Refresh

[+ ADD CLAUSE](#)
[IMPORT CLAUSES](#)

Clause	Section	Prescription Number	Last Updated	Last Sync
52.222-62   Paid Sick Leave Under Executive Order 13706. <i>Clause • FAR • Jan 2022</i>	I	22.2110	May 28, 2022 11:24 AM	May 28, 2022 11:24 AM
52.222-55   Minimum Wages for Contractor Workers Under Executive Order 14026. <i>Clause • FAR • Jan 2022</i>	I	22.1906	May 28, 2022 11:24 AM	May 28, 2022 11:24 AM
52.244-6   Subcontracts for Commercial Products and Commercial Services. <i>Clause • FAR • Jan 2022</i>	I	44.403	May 27, 2022 12:09 PM	May 27, 2022 12:09 PM
52.242-3   Penalties for Unallowable Costs. <i>Clause • FAR • Sep 2021</i>	I	42.709-7	May 27, 2022 12:05 PM	May 27, 2022 12:05 PM
52.226-6   Promoting Excess Food Donation to Nonprofit Organizations. <i>Clause • FAR • Jun 2020</i>	I	26.404	May 27, 2022 11:33 AM	May 27, 2022 11:33 AM
52.225-25   Prohibition on Contracting With Entities Engaging in Certain Activities or Transactions Relating to Iran—Representation ... <i>Provision • FAR • Jun 2020</i>	K	25.1103	May 27, 2022 11:32 AM	May 27, 2022 11:32 AM
52.222-54   Employment Eligibility Verification. <i>Clause • FAR • May 2022</i>	I	22.1803	May 27, 2022 11:23 AM	May 27, 2022 11:23 AM

# Viewing clauses

From the Clauses tab, you can view a list of all existing clauses for your organization, including the clause name, type, source, and effective date for each clause. You can also search and filter the clause list to find a specific clause or all clauses that match certain criteria.

**Clauses**

SEARCH
 TYPE | Any
SOURCE | Any
EFFECTIVE DATE | Any
Download
Filter
Refresh

[+ ADD CLAUSE](#)
[IMPORT CLAUSES](#)

Clause	Section	Prescription Number	Last Updated	Last Sync
52.202-1   Definitions. <i>Clause • FAR • Jun 2020</i>	I	2.201	Oct 30, 2021 10:32 AM	Oct 30, 2021 10:32 AM
52.202-1   Definitions. <i>Clause • FAR • Jun 2020</i>	I	2.201	Nov 29, 2021 8:12 PM	Nov 29, 2021 8:12 PM
52.203-3   Gratuities. <i>Clause • FAR • Apr 1984</i>	I	3.202	Oct 30, 2021 10:32 AM	Oct 30, 2021 10:32 AM
52.203-6   Restrictions on Subcontractor Sales to the Government <i>Clause • FAR • Jun 2020</i>	I	3.503-2	Aug 7, 2021 6:03 AM	Jul 24, 2021 10:30 AM
52.204-1   Approval of Contract. <i>Clause • FAR • Dec 1989</i>	I	4.103	Oct 30, 2021 10:35 AM	Oct 30, 2021 10:35 AM
52.204-2   Security Requirements <i>Clause • FAR • Mar 2021</i>	I	4.404	Aug 7, 2021 6:04 AM	Jul 24, 2021 10:33 AM

Click on the clause name to drill through and learn more about that specific clause.

# Clause summary view

The clause summary view provides a detailed view of the clause, including details such as type, source, prescription, text, and history.

# 52.202-1 | Definitions.

EDIT CLAUSE

SYNC WITH ACQUISITION.GOV

Summary

Clause History

Related Actions

## DETAILS

### Type

Clause

### Source

FAR

### Section

|

### Effective Date

Jun 2020

### Included By

Incorporated By Reference (IBR)

### Fill-ins

-

### Editable

No

### Status

Active

## CLAUSE PRESCRIPTION

### Number

2.201

### Text

## 2.201 Contract clause.

Insert the clause at 52.202-1, Definitions, in solicitations and contracts that exceed the simplified acquisition threshold.

## CLAUSE TEXT

## 52.202-1 Definitions.

As prescribed in 2.201 , insert the following clause:

Definitions (Jun 2020)

When a solicitation provision or contract clause uses a word or term that is defined in the Federal Acquisition Regulation (FAR), the word or term has the same meaning as the definition in FAR 2.101 in effect at the time the solicitation was issued, unless-

- (a) The solicitation, or amended solicitation, provides a different definition;
- (b) The contracting parties agree to a different definition;
- (c) The part, subpart, or section of the FAR where the provision or clause is prescribed provides a different meaning;
- (d) The word or term is defined in FAR part 31, for use in the cost principles and procedures; or
- (e) The word or term defines an acquisition-related threshold, and if the threshold is adjusted for inflation as set forth in FAR 1.109(a), then the changed threshold applies throughout the remaining term of the contract, unless there is a subsequent threshold adjustment; see FAR 1.109(d).

(End of clause)



## Clause history

To see a log of the clause history, click **Clause History**. The history provides a log of all updates made to the clause, the user who made the update, and the time of update.

# 52.202-1 | Definitions.

Summary

Clause History

Related Actions

User	Modification	Time
GAM Admin	<b>Updated</b> the Clause by weekly auto-sync <ul style="list-style-type: none"><li>Changed Editable from blank to "No"</li></ul>	Oct 30, 2021 10:32 AM
Anthony Hill	<b>Updated</b> the Clause by manual sync <ul style="list-style-type: none"><li>Edited Prescription Text ( <a href="#">Show Changes</a> )</li><li>Edited Clause Text ( <a href="#">Show Changes</a> )</li></ul>	Oct 29, 2021 4:09 AM
GAM Admin	<b>Updated</b> the Clause by weekly auto-sync <ul style="list-style-type: none"><li>Edited Clause Text ( <a href="#">Show Changes</a> )</li><li>Changed Status from "Inactive" to "Active"</li></ul>	Sep 11, 2021 10:30 AM
GAM Admin	<b>Updated</b> the Clause by weekly auto-sync <ul style="list-style-type: none"><li>Changed Status from "Inactive" to "Active"</li></ul>	Sep 10, 2021 10:30 AM
GAM Admin	<b>Updated</b> the Clause by weekly auto-sync <ul style="list-style-type: none"><li>Changed Status from "Inactive" to "Active"</li></ul>	Sep 4, 2021 10:30 AM
GAM Admin	<b>Updated</b> the Clause by weekly auto-sync <ul style="list-style-type: none"><li>Changed Status from "Inactive" to "Active"</li></ul>	Sep 3, 2021 10:30 AM

## Adding clauses

GCA provides a few options for adding clauses to your environment. Clauses can be added through the Acquisition.gov sync, manual creation, and importing from a spreadsheet.

## Syncing clause data from Acquisition.gov

GCA integrates with Acquisition.gov to ensure your clause data reflects the most recent data available. A sync occurs on a weekly basis to ensure any updates to FAR clauses are brought directly into your application. You can also trigger an individual sync from the Summary page of each clause.

The screenshot displays the GCA interface for clause 52.223-18. The top navigation bar includes the 'appian' logo, 'CLAUSE SETS', 'CLAUSES', and 'Clause Automation' with a user profile icon. The main header shows the clause title '52.223-18 | Encouraging Contractor Policies to Ban Text Messaging While Driving.' and a 'SYNC WITH ACQUISITION.GOV' button. Below the header, there are three main sections: 'DETAILS', 'CLAUSE PRESCRIPTION', and 'CLAUSE TEXT'. The 'DETAILS' section on the left lists attributes such as Type (Clause), Source (FAR), Section (I), Effective Date (Jun 2020), Format (Incorporated By Reference (IBR)), Fill-ins (No), Editable (No), and Status (Active). The 'CLAUSE PRESCRIPTION' section shows the Number (23.1105) and Text ('23.1105 Contract clause.'). The 'CLAUSE TEXT' section contains the full text of the clause, including definitions and conditions for use.

## Manually creating clauses

You can manually add clauses that are not retrieved from the Acquisition.gov FAR repository using the ADD CLAUSE action on the Clauses page.

To add a clause manually:

1. Click on **+ADD CLAUSE** to add a clause manually.

appian CLAUSE SETS CLAUSES TEMPLATES QUESTIONNAIRES Clause Automation

### Clauses

Search Clauses SEARCH TYPE Any SOURCE Any EFFECTIVE DATE Any

+ ADD CLAUSE IMPORT CLAUSES

Clause	Section	Prescription Number ↓	Last Updated	Last Sync
52.222-62   Paid Sick Leave Under Executive Order 13706. <i>Clause • FAR • Jan 2022</i>	I	22.2110	May 28, 2022 11:24 AM	May 28, 2022 11:24 AM
52.222-55   Minimum Wages for Contractor Workers Under Executive Order 14026. <i>Clause • FAR • Jan 2022</i>	I	22.1906	May 28, 2022 11:24 AM	May 28, 2022 11:24 AM
52.244-6   Subcontracts for Commercial Products and Commercial Services. <i>Clause • FAR • Jan 2022</i>	I	44.403	May 27, 2022 12:09 PM	May 27, 2022 12:09 PM
52.242-3   Penalties for Unallowable Costs. <i>Clause • FAR • Sep 2021</i>	I	42.709-7	May 27, 2022 12:05 PM	May 27, 2022 12:05 PM
52.226-6   Promoting Excess Food Donation to Nonprofit Organizations. <i>Clause • FAR • Jun 2020</i>	I	26.404	May 27, 2022 11:33 AM	May 27, 2022 11:33 AM
52.225-25   Prohibition on Contracting With Entities Engaging in Certain Activities or Transactions Relating to Iran—Representation ... <i>Provision • FAR • Jun 2020</i>	K	25.1103	May 27, 2022 11:32 AM	May 27, 2022 11:32 AM
52.222-54   Employment Eligibility Verification. <i>Clause • FAR • May 2022</i>	I	22.1803	May 27, 2022 11:23 AM	May 27, 2022 11:23 AM

## 2. Fill in the form:

- **Clause Number:** The clause identifier. The clause number must be unique. Alternate clauses (alternate versions of the same clause) must be synced through a weekly sync process for FAR clauses. Local clauses (clauses created through manually adding or importing) that have alternates must have something appended to the clause number.
- **Title:** The title of the clause.
- **Type:** The type of clause. The type can be *Clause* or *Provision*.
- **Source:** The source of the clause. The source can be *FAR*, *HHSAR*, or *Local*.
- **Clause Section:** The clause section. The options are *E*, *F*, *G*, *H*, *I*, *K*, *L*, *M*, *NA*.
- **Effective Date:** The date when the terms of the clause begin.
- **Included By:** The options are *Full Text* or *Incorporated By Reference (IBR)*.
- **Fill-ins:** Whether the clause will include fill-ins.
- **Editable:** Whether the clause will be editable.
- **Status:** The status of the clause. The status can be *Active* or *Inactive*.
- **Prescription Number:** Where the clause is prescribed.
- **Prescription Text:** The prescription text.
- **Clause Text:** The clause text.

## 3. Click **SAVE**.

## Add Clause

### Clause Properties

Clause Number\*  Title\*

Type\*  
 Clause  Provision

Source\*  Clause Section\*  Effective Date\*

Included By\*  
 Full Text  Incorporated By Reference (IBR)

Fill-ins\*  
 Yes  No

Editable\*  
 Yes  No

Status\*  
 Active  Inactive

### Clause Details

Prescription Number\*

Prescription Text\*

Clause Text\*

CANCEL ADD

Clauses that are manually added can not have alternate clauses.

## Importing clauses from a spreadsheet

You can also bulk import clauses, which allows you to quickly add a large group of clauses to your GCA environment. GCA provides a sample import file to help simplify and guide you through the import process.

To import clauses:

1. Click **Import clauses**.

appian CLAUSE SETS CLAUSES TEMPLATES QUESTIONNAIRES Clause Automation

### Clauses

Search Clauses SEARCH TYPE Any SOURCE Any EFFECTIVE DATE Any

+ ADD CLAUSE IMPORT CLAUSES

Clause	Section	Prescription Number ↓	Last Updated	Last Sync
52.222-62   Paid Sick Leave Under Executive Order 13706. <i>Clause • FAR • Jan 2022</i>	I	22.2110	May 28, 2022 11:24 AM	May 28, 2022 11:24 AM
52.222-55   Minimum Wages for Contractor Workers Under Executive Order 14026. <i>Clause • FAR • Jan 2022</i>	I	22.1906	May 28, 2022 11:24 AM	May 28, 2022 11:24 AM
52.244-6   Subcontracts for Commercial Products and Commercial Services. <i>Clause • FAR • Jan 2022</i>	I	44.403	May 27, 2022 12:09 PM	May 27, 2022 12:09 PM
52.242-3   Penalties for Unallowable Costs. <i>Clause • FAR • Sep 2021</i>	I	42.709-7	May 27, 2022 12:05 PM	May 27, 2022 12:05 PM
52.226-6   Promoting Excess Food Donation to Nonprofit Organizations. <i>Clause • FAR • Jun 2020</i>	I	26.404	May 27, 2022 11:33 AM	May 27, 2022 11:33 AM
52.225-25   Prohibition on Contracting With Entities Engaging in Certain Activities or Transactions Relating to Iran—Representation ... <i>Provision • FAR • Jun 2020</i>	K	25.1103	May 27, 2022 11:32 AM	May 27, 2022 11:32 AM
52.222-54   Employment Eligibility Verification. <i>Clause • FAR • May 2022</i>	I	22.1803	May 27, 2022 11:23 AM	May 27, 2022 11:23 AM

2. Download sample import file.
3. Add your clause data to the sample import file
4. Follow the steps in the import wizard.
  1. Upload your clause file.

### Import Clauses ✕

Step 1 of 3

## Upload Clause File

Download sample import file, add Clause data and upload below

[Download sample import file](#)

UPLOAD
Drop file here

CANCEL
NEXT

2. Map your file data fields to the system clause fields.

### Import Clauses

Step 2 of 3

## Confirm Clause Data Mapping

Map the file data to the system data. You can preview the clause data in the next step.

Clause File Data	System Clause Fields
Clause Number	Clause Number
Title	Title
Type	Type
Source	Source
Clause Section	Clause Section
Effective Date	Effective Date
Included By	Included By
Fill-ins	Fill-ins
Editable	Editable

BACK CANCEL NEXT

3. Preview your clause data and fix any errors.

### Import Clauses

Step 3 of 3

## Preview Clause Data

Preview the clause data to make sure the mapping is accurate

Clause Number *	Title *	Type *	Source *	Clause Section *	Effective Date *	Included By *	Fill-ins *	Editable *	Status *	Prescription Number *	Prescription Text *	Clause Text *
52.203-4	Grat	Clause	FAR	I	Apr 1984	Incorporated By Reference (IBR)	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Active <input type="radio"/> Inactive	3.202	The contracting officer shall	As prescribed <span style="color: red;">✖</span>

BACK CANCEL IMPORT

5. Click **IMPORT**.

Clauses that are added through import can not have alternate clauses.

## Editing clauses

A clause can be updated by clicking **EDIT CLAUSE** in the clause summary view.

appian CLAUSE SETS CLAUSES TEMPLATES QUESTIONNAIRES Clause Automation 

## 52.202-1 | Definitions.

[EDIT CLAUSE](#) [SYNC WITH ACQUISITION.GOV](#)

[Summary](#) [Clause History](#) [Related Actions](#)

### DETAILS

**Type**  
Clause

**Source**  
FAR

**Section**  
I

**Effective Date**  
Jun 2020

**Included By**  
Incorporated By Reference (IBR)

**Fill-ins**  
-

**Editable**  
No

**Status**  
Active

### CLAUSE PRESCRIPTION

**Number**  
2.201

**Text**  
**2.201 Contract clause.**  
Insert the clause at 52.202-1, Definitions, in solicitations and contracts that exceed the simplified acquisition threshold.

### CLAUSE TEXT

**52.202-1 Definitions.**  
As prescribed in 2.201, insert the following clause:  
Definitions (Jun 2020)  
When a solicitation provision or contract clause uses a word or term that is defined in the Federal Acquisition Regulation (FAR), the word or term has the same meaning as the definition in FAR 2.101 in effect at the time the solicitation was issued, unless-

- (a) The solicitation, or amended solicitation, provides a different definition;
- (b) The contracting parties agree to a different definition;
- (c) The part, subpart, or section of the FAR where the provision or clause is prescribed provides a different meaning;

The clause number is the only field that cannot be updated.

### Edit Clause | 52.211-5

#### Clause Properties

**Clause Number\***  **Title\***

**Type\***  
 Clause  Provision

**Source\***  **Clause Section\***  **Effective Date\***

**Included By\***  
 Full Text  Incorporated By Reference (IBR)

**Fill-ins\***  
 Yes  No

**Editable\***  
 Yes  No

**Status\***  
 Active  Inactive

#### Clause Details

[CANCEL](#) [SAVE](#)

# 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

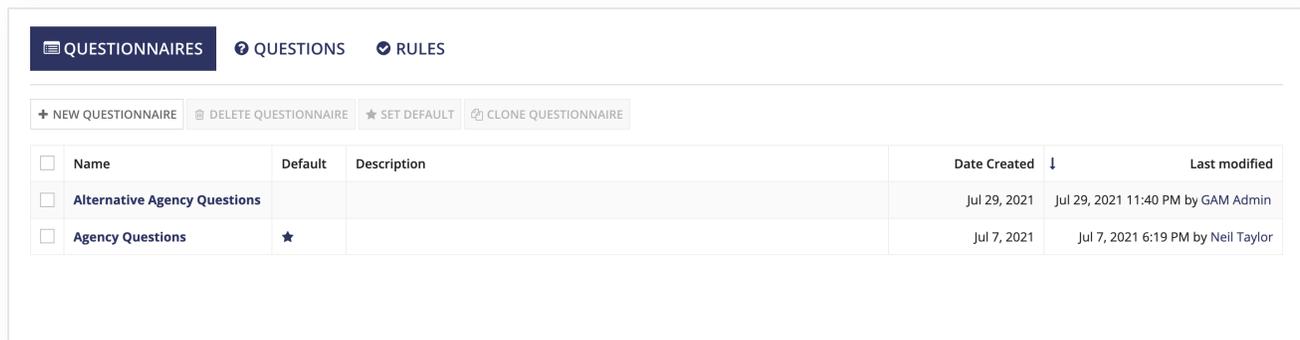
On the Clause Automation site, a grid lists all of the information that is pertinent to questionnaires. Users can use this information to determine which questionnaires already exist and when their last update occurred.

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.



<input type="checkbox"/>	Name	Default	Description	Date Created	Last modified
<input type="checkbox"/>	Alternative Agency Questions			Jul 29, 2021	Jul 29, 2021 11:40 PM by GAM Admin
<input type="checkbox"/>	Agency Questions	★		Jul 7, 2021	Jul 7, 2021 6:19 PM by Neil Taylor

## Creating a new questionnaire

To create a new questionnaire:

1. From the **Questionnaires** page, click **NEW QUESTIONNAIRE**.
2. Enter a questionnaire **Name** and **Description**.

## Create Questionnaire

Details

**Name \***  
Alternative Agency Questions

**Description**  
Alternative set of agency-specific questions

CANCEL  CREATE QUESTIONNAIRE

3. Click **CREATE QUESTIONNAIRE**.
4. Select **ADD CATEGORY** to add a question category.

## Alternative Agency Questions

Details EDIT DETAILS

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

Question Categories

+ ADD CATEGORY 

Category Name	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.

The screenshot shows the 'Alternative Agency Questions' interface. At the top, there's a 'Details' section with 'Name: Alternative Agency Questions' and 'Description: Alternative set of agency-specific questions'. Below this is a 'Question Categories' sidebar with 'Default' selected. The main area is titled 'Default' and contains a '+ ADD QUESTION' button. Below the button is a table with columns 'Question', 'Response Type', and 'Choices'. The table is currently empty, displaying 'No items available'. There are 'UPDATE CATEGORY' and 'DELETE CATEGORY' buttons in the top right of the main area.

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

This screenshot is identical to the one above, but with a yellow arrow pointing to the '+ ADD QUESTION' button. The interface shows the 'Alternative Agency Questions' page with the 'Default' category selected in the sidebar. The main content area has a '+ ADD QUESTION' button, a table with columns 'Question', 'Response Type', and 'Choices', and 'No items available' text. 'UPDATE CATEGORY' and 'DELETE CATEGORY' buttons are also present.

8. Use the Search field to look for a specific question in the grid. After 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

Question Text	Response Type	Choices
What is GCM?	Radio Button	<ul style="list-style-type: none"> <li>Government Clause Management</li> <li>General Claim Management</li> </ul>
Does this contract have options?	Radio Button	<ul style="list-style-type: none"> <li>Yes</li> <li>No</li> </ul>
Are you buying IT Hardware?	Radio Button	<ul style="list-style-type: none"> <li>Yes</li> <li>No</li> </ul>

### 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

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" ✕

0%

**Default >**

### Default

---

Does this contract have options?

Yes  
 No

---

Are you buying IT Hardware?

Yes  
 No

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**.

Alternative Agency Questions PREVIEW QUESTIONNAIRE

**Details** EDIT DETAILS

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

**Question Categories**

**Default** UPDATE CATEGORY DELETE CATEGORY

**Default** ADD CATEGORY

ADD QUESTION

<input type="checkbox"/>	Question	Response Type	Choices
<input type="checkbox"/>	Does this contract have options?	RADIO_BUTTON_TEXT	<ul style="list-style-type: none"><li>Yes</li><li>No</li></ul>
<input type="checkbox"/>	Are you buying IT Hardware?	RADIO_BUTTON_TEXT	<ul style="list-style-type: none"><li>Yes</li><li>No</li></ul>

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.

Alternative Agency Questions EDIT DETAILS

**Details**

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

**Question Categories** ADD CATEGORY

<input type="checkbox"/>	Question	Response Type	Choices
No items available			

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

## Create Category ✕

**Category Name \***

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

+ ADD QUESTION

<input type="checkbox"/>	Question	Response Type	Choices
No items available			

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

<input type="checkbox"/>	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 identifying the question you want to add, simply click on it to add it to the category.
- o **Note:** If you can't find the question you're looking for, see [Creating a new question](#) to add a question.

### Add Question X

**Select a Question**

Search for a question to add... SEARCH

Question Text	Response Type	Choices
What is GCM?	Radio Button	<ul style="list-style-type: none"> <li>Government Clause Management</li> <li>General Claim Management</li> </ul>
Does this contract have options?	Radio Button	<ul style="list-style-type: none"> <li>Yes</li> <li>No</li> </ul>
Are you buying IT Hardware?	Radio Button	<ul style="list-style-type: none"> <li>Yes</li> <li>No</li> </ul>

**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**.

Alternative Agency Questions PREVIEW QUESTIONNAIRE

Details EDIT DETAILS

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

Question Categories

**Default** UPDATE CATEGORY DELETE CATEGORY

+ ADD QUESTION UPDATE QUESTION DELETE QUESTION

Question	Response Type	Choices
<input checked="" type="checkbox"/> Does this contract have options?	RADIO_BUTTON_TEXT	<ul style="list-style-type: none"> <li>Yes</li> <li>No</li> </ul>
<input type="checkbox"/> Are you buying IT Hardware?	RADIO_BUTTON_TEXT	<ul style="list-style-type: none"> <li>Yes</li> <li>No</li> </ul>

+ ADD CATEGORY

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 will display. 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."

QUESTIONNAIRES **QUESTIONS** RULES

+ NEW QUESTION IMPORT QUESTIONS 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	

## 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.

The screenshot shows the configuration for a Dropdown question type. On the left, there is a 'Type \*' dropdown menu set to 'Dropdown' and a 'Max Selections' input field set to '2'. On the right, there is a 'Response Options' section with a list of options: 'car', 'truck', 'van', and 'bus'. Each option has a trash icon to its right. At the bottom of the list is a '+ Add Option' button.

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

The screenshot shows the configuration for a Radio Button question type. On the left, there is a 'Type \*' dropdown menu set to 'Radio Button'. On the right, there is a 'Response Options' section with a list of options: 'car', 'truck', and 'van'. Each option has a trash icon to its right. At the bottom of the list is a '+ Add Option' button.

## Creating a new question

To create a new question:

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

The screenshot shows the 'Questions' page interface. At the top, there are three tabs: 'QUESTIONNAIRES', 'QUESTIONS' (which is active and highlighted in dark blue), and 'RULES'. Below the tabs, there is a '+ NEW QUESTION' button with a yellow arrow pointing to it, and a 'QUESTIONS' button. To the right, there is a search bar with a dropdown menu set to '--- All ---', a search input field containing 'Search for a question', and a 'SEARCH' button. Below the search bar is a table with three columns: 'Question', 'Response Type', and 'Last modified'. The table contains three rows of data.

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.

## Create Question ✕

### Question

**Question Text \***

### Response

**Type \***

Response Options	
car	
truck	
bus	
van	
<a href="#">+ Add Option</a>	

**Max Selections**

CANCEL

CREATE QUESTION

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.

## Update Question ✕

Edits to this question will be reflected on all questionnaire templates that reference it.

### Question

**Question Text \***

### Response

**Type \***

Response Options	
car	
truck	
bus	
van	
<a href="#">+ Add Option</a>	

**Max Selections**

CANCEL

UPDATE QUESTION

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.
  - o 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.

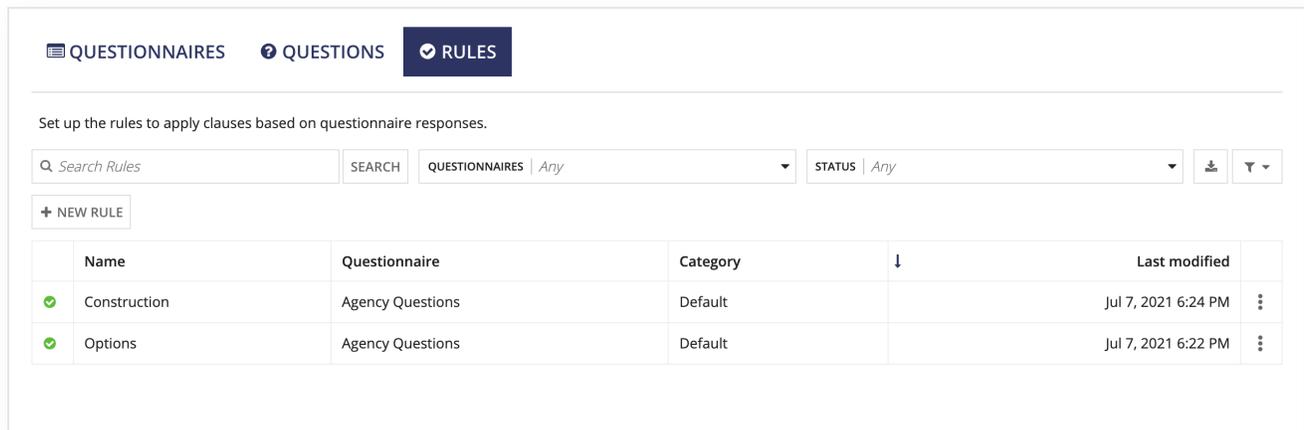
## Viewing rules

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.



The screenshot shows the 'RULES' page in a web application. At the top, there are three tabs: 'QUESTIONNAIRES', 'QUESTIONS', and 'RULES' (which is selected). Below the tabs, there is a heading: 'Set up the rules to apply clauses based on questionnaire responses.' Underneath, there is a search bar with the placeholder text 'Search Rules' and a 'SEARCH' button. To the right of the search bar are two dropdown menus: 'QUESTIONNAIRES | Any' and 'STATUS | Any'. Further right are two icons: a download icon and a filter icon. Below the search and filter area is a '+ NEW RULE' button. The main content is a table with the following columns: 'Name', 'Questionnaire', 'Category', and 'Last modified'. There are two rows of data in the table, both with a green checkmark in the first column. The first row has 'Construction' as the name, 'Agency Questions' as the questionnaire, 'Default' as the category, and 'Jul 7, 2021 6:24 PM' as the last modified date. The second row has 'Options' as the name, 'Agency Questions' as the questionnaire, 'Default' as the category, and 'Jul 7, 2021 6:22 PM' as the last modified date. Each row has a vertical ellipsis icon in the 'Last modified' column.

	Name	Questionnaire	Category	↓	Last modified	
✓	Construction	Agency Questions	Default		Jul 7, 2021 6:24 PM	⋮
✓	Options	Agency Questions	Default		Jul 7, 2021 6:22 PM	⋮

## Creating a new rule

To create a new rule:

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

QUESTIONNAIRES   QUESTIONS   **RULES**

Set up the rules to apply clauses based on questionnaire responses.

  SEARCH  
 QUESTIONNAIRES | Any  
 STATUS | Any  
   


**+ NEW RULE** 

	Name	Questionnaire	Category	↓	Last modified	
✓	Construction	Agency Questions	Default		Jul 7, 2021 6:24 PM	⋮
✓	Options	Agency Questions	Default		Jul 7, 2021 6:22 PM	⋮

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.

### Create Rule ✕

**CREATE RULE**   2 INCLUDE CLAUSES   3 EXCLUDE CLAUSES

**Name \***    **Status \***  Active    Inactive

**Questionnaire \***    **Category \***

**Conditions**  
 Select the questions and responses to which the rule should be applied

**Question \***    **Operator \***    **Response Options \***

 Add Condition

CANCEL **NEXT**

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.
  - **Note:** Rules can be set up to include specific clauses, exclude specific clauses, or both when a new clause set is generated. Excluded clauses are not included as part of the clause set or listed as suggested applicable or optional clauses. These clauses can only be excluded if they are not **Required** clauses based on the FAR matrix. However, excluded clauses can be manually added back when creating a new clause set or through the **Add Clause** related action.

7. In the **Available Clauses** section, click the **checkbox**  next to each clause you want to attach to the rule. These clauses will be included by this rule.

- Easily search the clause list for a specific clause or filter by clause or provision **Type**, clause **Source**, or both.

**1 CREATE RULE** | **INCLUDE CLAUSES** | **3 EXCLUDE CLAUSES**

**Available Clauses**  
Select the clauses to include in the rule

Q Search Clauses SEARCH TYPE | Any

SOURCE | Any

<input type="checkbox"/>	Clause
<input type="checkbox"/>	52.216-32   Alternate I Clause • FAR • Sep 2019
<input checked="" type="checkbox"/>	52.216-32   Task-Order and Delivery-Order Ombudsman. Clause • FAR • Sep 2019
<input type="checkbox"/>	52.204-25   Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment. Clause • FAR • Nov 2021
<input type="checkbox"/>	52.204-24   Representation Regarding Certain Telecommunications and Video Surveillance Services or Equipment. Provision • FAR • Nov 2021
<input type="checkbox"/>	52.247-64   Alternate II Clause • FAR • Nov 2021
<input type="checkbox"/>	52.247-64   Alternate I Clause • FAR • Apr 2003
<input type="checkbox"/>	52.247-64   Preference for Privately Owned U.S.-Flag Commercial Vessels. Clause • FAR • Nov 2021
<input checked="" type="checkbox"/>	52.247-63   Preference for U.S.-Flag Air Carriers. Clause • FAR • Jun 2003
<input type="checkbox"/>	52.229-14   Taxes—Foreign Contracts in Afghanistan (North Atlantic Treaty Organization Status of Forces Agreement). Clause • FAR • Nov 2021
<input type="checkbox"/>	52.229-13   Taxes—Foreign Contracts in Afghanistan. Clause • FAR • Nov 2021

<< < 11 – 20 of 813 > >>

**Included Clauses**  
Following clauses are included in the rule

Q Search Clauses SEARCH TYPE | Any

SOURCE | Any

No clauses available

> <

BACK CANCEL NEXT

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.

1 CREATE RULE INCLUDE CLAUSES 3 EXCLUDE CLAUSES

**Available Clauses**  
Select the clauses to include in the rule

Q Search Clauses SEARCH TYPE Any

SOURCE Any

Clause
<input type="checkbox"/> 52.216-32   Alternate I Clause • FAR • Sep 2019
<input checked="" type="checkbox"/> 52.216-32   Task-Order and Delivery-Order Ombudsman. Clause • FAR • Sep 2019
<input type="checkbox"/> 52.204-25   Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment. Clause • FAR • Nov 2021
<input type="checkbox"/> 52.204-24   Representation Regarding Certain Telecommunications and Video Surveillance Provision • FAR • Nov 2021
<input type="checkbox"/> 52.247-64   Alternate II Clause • FAR • Nov 2021
<input type="checkbox"/> 52.247-64   Alternate I Clause • FAR • Apr 2003
<input type="checkbox"/> 52.247-64   Preference for Privately Owned U.S.-Flag Commercial Vessels. Clause • FAR • Nov 2021
<input checked="" type="checkbox"/> 52.247-63   Preference for U.S.-Flag Air Carriers. Clause • FAR • Jun 2003
<input type="checkbox"/> 52.229-14   Taxes—Foreign Contracts in Afghanistan (North Atlantic Treaty Organization Status of Forces Agreement). Clause • FAR • Nov 2021
<input type="checkbox"/> 52.229-13   Taxes—Foreign Contracts in Afghanistan. Clause • FAR • Nov 2021

<< < 11 - 20 of 813 > >>

BACK CANCEL NEXT

2. Click **NEXT** when you are ready to assign clauses that are excluded by this rule.
  - o **Note:** Each rule requires at least one included or excluded clause. Neither step is required as long as there is one clause in the other step.
3. In the **Available Clauses** section, click the **checkbox**  next to each clause you want the rule to exclude.
  - o Easily search the clause list for a specific clause or filter the clause list by clause or provision **Type**, clause **Source**, or both.
  - o Clauses that have been assigned for inclusion cannot be selected for exclusion, and vice versa.

**1 CREATE RULE**      **2 INCLUDE CLAUSES**      **EXCLUDE CLAUSES**

**Available Clauses**  
Select the clauses to exclude from the rule

Q Search Clauses    SEARCH    TYPE | Any    ▾    ▾

SOURCE | Any    ▾

<input type="checkbox"/>	Clause
<input checked="" type="checkbox"/>	52.228-12   Prospective Subcontractor Requests for Bonds. Clause • FAR • May 2014
<input type="checkbox"/>	52.228-2   Additional Bond Security. Clause • FAR • Oct 1997
<input type="checkbox"/>	52.227-5   Waiver of Indemnity. Clause • FAR • Apr 1984
<input type="checkbox"/>	52.227-4   Alternate I Clause • FAR • Dec 2007
<input type="checkbox"/>	52.227-4   Patent Indemnity-Construction Contracts. Clause • FAR • Dec 2007
<input type="checkbox"/>	52.227-3   Alternate III Clause • FAR • Jun 2020
<input type="checkbox"/>	52.227-3   Alternate II Clause • FAR • Apr 1984
<input type="checkbox"/>	52.227-3   Alternate I Clause • FAR • Apr 1984
<input type="checkbox"/>	52.227-3   Patent Indemnity. Clause • FAR • Apr 1984
<input checked="" type="checkbox"/>	52.227-2   Notice and Assistance Regarding Patent and Copyright Infringement. Clause • FAR • Jun 2020

<< < 21 - 30 of 813 > >>

BACK    CANCEL      **CREATE**

- 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.

**1 CREATE RULE**      **2 INCLUDE CLAUSES**      **EXCLUDE CLAUSES**

**Available Clauses**  
Select the clauses to exclude from the rule

Q Search Clauses    SEARCH    TYPE | Any    ▾    ▾

SOURCE | Any    ▾

<input type="checkbox"/>	Clause
<input checked="" type="checkbox"/>	52.228-12   Prospective Subcontractor Requests for Bonds. Clause • FAR • May 2014
<input type="checkbox"/>	52.228-2   Additional Bond Security. Clause • FAR • Oct 1997
<input type="checkbox"/>	52.227-5   Waiver of Indemnity. Clause • FAR • Apr 1984
<input type="checkbox"/>	52.227-4   Alternate I Clause • FAR • Dec 2007
<input type="checkbox"/>	52.227-4   Patent Indemnity-Construction Contracts. Clause • FAR • Dec 2007
<input type="checkbox"/>	52.227-3   Alternate III Clause • FAR • Jun 2020
<input type="checkbox"/>	52.227-3   Alternate II Clause • FAR • Apr 1984
<input type="checkbox"/>	52.227-3   Alternate I Clause • FAR • Apr 1984
<input type="checkbox"/>	52.227-3   Patent Indemnity. Clause • FAR • Apr 1984
<input checked="" type="checkbox"/>	52.227-2   Notice and Assistance Regarding Patent and Copyright Infringement. Clause • FAR • Jun 2020

<< < 21 - 30 of 813 > >>

BACK    CANCEL      **CREATE**

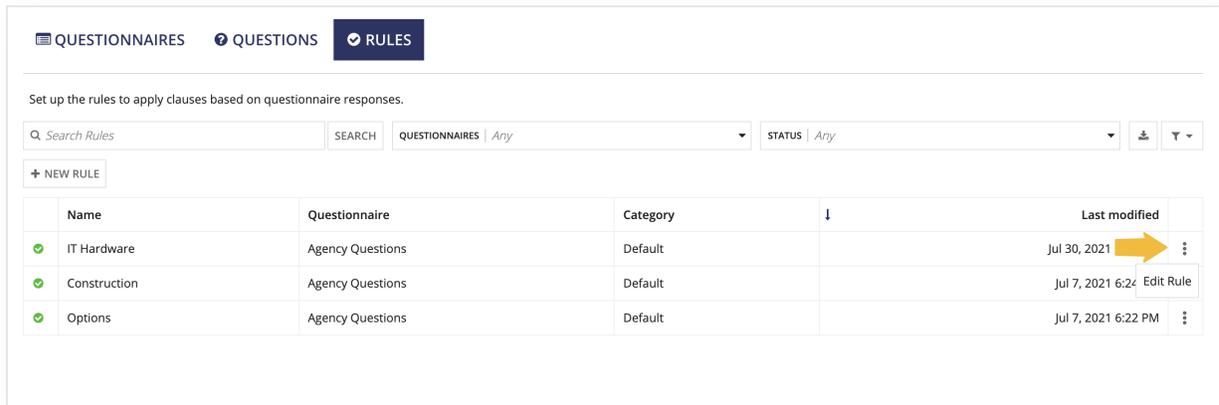
- Click **CREATE** to create the rule.

# 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.
  - o Select **Add Condition** to apply the rule to another question and response set.
6. Click **NEXT**.
7. In the **Available Clauses** section, click the **checkbox**  next to each clause you want to add to the rule.
  - o The **Available Clauses** section displays a list of all clauses in your Clause Automation solution. You can search for a specific clause, filter by **Type** (Clause or Provision), and filter by **Source** (FAR, Department, or Agency).

1 CREATE RULE INCLUDE CLAUSES 3 EXCLUDE CLAUSES

**Available Clauses**  
Select the clauses to include in the rule

Q Search Clauses SEARCH TYPE | Any

SOURCE | Any

<input type="checkbox"/>	Clause
<input type="checkbox"/>	52.216-32   Alternate I Clause • FAR • Sep 2019
<input checked="" type="checkbox"/>	52.216-32   Task-Order and Delivery-Order Ombudsman. Clause • FAR • Sep 2019
<input type="checkbox"/>	52.204-25   Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment. Clause • FAR • Nov 2021
<input type="checkbox"/>	52.204-24   Representation Regarding Certain Telecommunications and Video Surveillance Services or Equipment. Provision • FAR • Nov 2021
<input type="checkbox"/>	52.247-64   Alternate II Clause • FAR • Nov 2021
<input type="checkbox"/>	52.247-64   Alternate I Clause • FAR • Apr 2003
<input type="checkbox"/>	52.247-64   Preference for Privately Owned U.S.-Flag Commercial Vessels. Clause • FAR • Nov 2021
<input checked="" type="checkbox"/>	52.247-63   Preference for U.S.-Flag Air Carriers. Clause • FAR • Jun 2003
<input type="checkbox"/>	52.229-14   Taxes—Foreign Contracts in Afghanistan (North Atlantic Treaty Organization Status of Forces Agreement). Clause • FAR • Nov 2021
<input type="checkbox"/>	52.229-13   Taxes—Foreign Contracts in Afghanistan. Clause • FAR • Nov 2021

<< < 11 - 20 of 813 > >>

BACK CANCEL NEXT

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

1 CREATE RULE INCLUDE CLAUSES 3 EXCLUDE CLAUSES

**Available Clauses**  
Select the clauses to include in the rule

Q Search Clauses SEARCH TYPE | Any

SOURCE | Any

<input type="checkbox"/>	Clause
<input type="checkbox"/>	52.216-32   Alternate I Clause • FAR • Sep 2019
<input checked="" type="checkbox"/>	52.216-32   Task-Order and Delivery-Order Ombudsman. Clause • FAR • Sep 2019
<input type="checkbox"/>	52.204-25   Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment. Clause • FAR • Nov 2021
<input type="checkbox"/>	52.204-24   Representation Regarding Certain Telecommunications and Video Surveillance Services or Equipment. Provision • FAR • Nov 2021
<input type="checkbox"/>	52.247-64   Alternate II Clause • FAR • Nov 2021
<input type="checkbox"/>	52.247-64   Alternate I Clause • FAR • Apr 2003
<input type="checkbox"/>	52.247-64   Preference for Privately Owned U.S.-Flag Commercial Vessels. Clause • FAR • Nov 2021
<input checked="" type="checkbox"/>	52.247-63   Preference for U.S.-Flag Air Carriers. Clause • FAR • Jun 2003
<input type="checkbox"/>	52.229-14   Taxes—Foreign Contracts in Afghanistan (North Atlantic Treaty Organization Status of Forces Agreement). Clause • FAR • Nov 2021
<input type="checkbox"/>	52.229-13   Taxes—Foreign Contracts in Afghanistan. Clause • FAR • Nov 2021

<< < 11 - 20 of 813 > >>

BACK CANCEL NEXT

9. To remove clauses from **Selected Clauses**, click the **checkbox**  next to the clause you want to remove and click the left arrow.

10. When you have added and removed the desired clauses, click **NEXT**.

- **Note:** Each rule is only required to have at least one clause that is excluded or included.
11. In the **Available Clauses** section, click the **checkbox**  next to each clause you want the rule to exclude.
- The **Available Clauses** section displays a list of all clauses in your Clause Automation solution. You can search for a specific clause, filter by **Type** (Clause or Provision), and filter by **Source** (FAR, Department, or Agency).
  - Clauses that have been assigned for inclusion cannot be selected for exclusion, and vice versa.

The screenshot shows a web interface for creating a rule, specifically the 'EXCLUDE CLAUSES' step. It is divided into two main panels: 'Available Clauses' and 'Excluded Clauses'.

**Available Clauses:** This panel is titled 'Available Clauses' and contains the instruction 'Select the clauses to exclude from the rule'. It features a search bar, a 'SEARCH' button, and dropdown menus for 'TYPE' (set to 'Any') and 'SOURCE' (set to 'Any'). Below these is a list of clauses, each with a checkbox and a right-pointing arrow. The following table summarizes the visible clauses:

Clause ID	Description	Source	Selected
52.216-32	Alternate I	FAR • Sep 2019	<input type="checkbox"/>
52.216-32	Task-Order and Delivery-Order Ombudsman.	FAR • Sep 2019	<input checked="" type="checkbox"/>
52.204-25	Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.	FAR • Nov 2021	<input checked="" type="checkbox"/>
52.204-24	Representation Regarding Certain Telecommunications and Video Surveillance Services or Equipment.	FAR • Nov 2021	<input type="checkbox"/>
52.247-64	Alternate II	FAR • Nov 2021	<input type="checkbox"/>
52.247-64	Alternate I	FAR • Apr 2003	<input type="checkbox"/>
52.247-64	Preference for Privately Owned U.S.-Flag Commercial Vessels.	FAR • Nov 2021	<input type="checkbox"/>
52.247-63	Preference for U.S.-Flag Air Carriers.	FAR • Jun 2003	<input checked="" type="checkbox"/>
52.229-14	Taxes—Foreign Contracts in Afghanistan (North Atlantic Treaty Organization Status of Forces Agreement).	FAR • Nov 2021	<input checked="" type="checkbox"/>
52.229-13	Taxes—Foreign Contracts in Afghanistan.	FAR • Nov 2021	<input type="checkbox"/>

At the bottom of the list, there is a pagination indicator: '<< < 11 - 20 of 813 > >>'. To the right of the list are two arrow buttons: a right-pointing arrow (>) and a left-pointing arrow (<).

**Excluded Clauses:** This panel is titled 'Excluded Clauses' and contains the instruction 'Following clauses are excluded from the rule'. It has the same search and filter controls as the 'Available Clauses' panel. The main area of this panel is empty and displays the text 'No clauses available'.

At the bottom of the interface, there are three buttons: 'BACK', 'CANCEL', and 'SAVE'.

12. After you have selected the clauses you want the rule to exclude, click the **right arrow** to move them to the **Selected Clause** section.

The screenshot shows a web interface for managing clause exclusions. It is divided into three main sections: '1 CREATE RULE', '2 INCLUDE CLAUSES', and 'EXCLUDE CLAUSES'. The 'EXCLUDE CLAUSES' section is active and contains two columns: 'Available Clauses' and 'Excluded Clauses'. Both columns have search bars and dropdown menus for 'TYPE' and 'SOURCE'. The 'Available Clauses' column lists 11 clauses with checkboxes, and the 'Excluded Clauses' column lists 3 clauses with checkboxes. Navigation arrows are present between the columns and at the bottom of the 'Available Clauses' list. At the bottom of the interface are 'BACK', 'CANCEL', and 'SAVE' buttons.

13. To remove clauses for exclusion from **Selected Clauses**, click the **checkbox**  next to the clause you want to remove and click the left arrow.

14. When you are finished adding or removing clauses for exclusion to the rule, click **SAVE**.

All future questionnaires will use the updated rules. Clause sets that have already been generated or finalized 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.

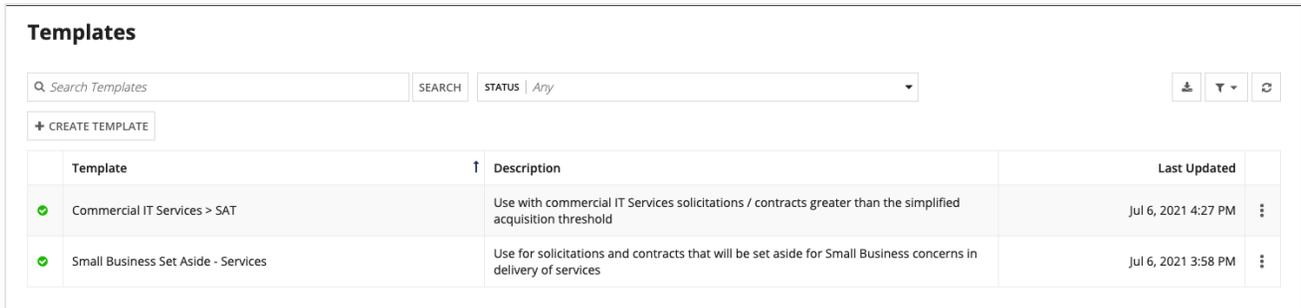
This page describes how to use the Clause Automation site to configure templates.

## 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 will 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.



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

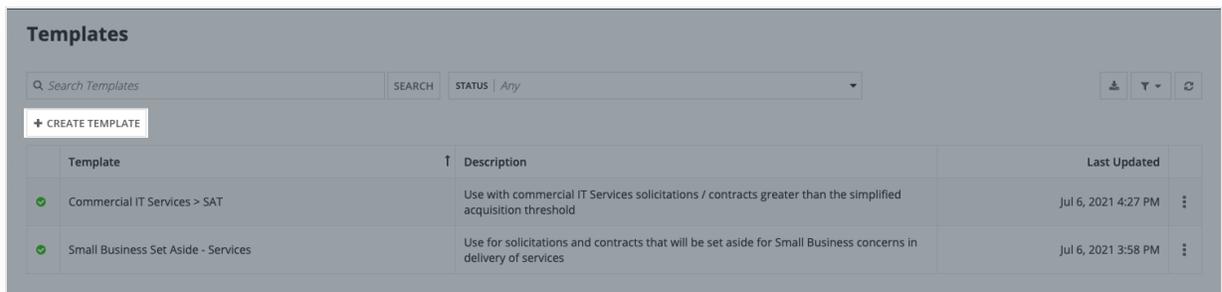
Clicking on the dotted icon to the left of each template will display the **Edit Template** action. Selecting that action will allow you to [update an existing template](#).

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**.



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

2. Enter a **Template Name** and **Description**.
3. Set the template's **Status** as **Active** or **Inactive**.
  - o **Active:** Users can select the template when creating a clause set.
  - o **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

<input type="checkbox"/>	Clause	Source	Type	Effective Date
<input type="checkbox"/>	52.229-12   on Certain Foreign Procurements.	FAR	Clause	-
<input type="checkbox"/>	52.229-11   on Certain Foreign Procurements—Notice and Representation.	FAR	Provision	-
<input type="checkbox"/>	52.219-33   Nonmanufacturer Rule.	FAR	Clause	-
<input type="checkbox"/>	52.219-32   Orders Issued Directly Under Small Business Reserves	FAR	Clause	-
<input type="checkbox"/>	52.219-31   Notice of Small Business Reserve.	FAR	Provision	-
<input type="checkbox"/>	52.246-26   Reporting Nonconforming Items.	FAR	Clause	-
<input type="checkbox"/>	52.204-26   Covered Telecommunications Equipment or Certain Representation	FAR	Provision	-

CANCEL CREATE

4. From the **Clause Catalog**, click the **checkbox**  next to each clause that you want to add to the template. Templates in clause automation can be set up to include specific clauses when a new clause set is generated, and/or to exclude specific clauses, so that they're not included as either part of the clause set nor listed as suggested applicable or optional clauses. Note that these clauses can only be excluded if they are not **Required** clauses based on the FAR matrix. Excluded clauses, however, can be manually added back when creating a new clause set, or through the **Add Clause** related action.
- o You can search for a specific clause or filter by **Source** and **Clause Type**.

**Create Template**

1 TEMPLATE DETAILS INCLUDE CLAUSES 3 EXCLUDE CLAUSES

**Clause Catalog**  
Select the clauses to include in the template

construction FAR  --- Select a Clause Type ---

ADD 

<input type="checkbox"/>	Clause	Source	Type	Effective Date
<input type="checkbox"/>	52.249-10   Default (Fixed-Price Construction).	FAR	Clause	Apr 1984
<input type="checkbox"/>	52.248-3   Value Engineering-Construction.	FAR	Clause	Oct 2020
<input type="checkbox"/>	52.246-21   Warranty of Construction.	FAR	Clause	Mar 1994
<input checked="" type="checkbox"/>	52.246-12   Inspection of Construction.	FAR	Clause	Aug 1996
<input type="checkbox"/>	52.236-28   Preparation of Proposals-Construction.	FAR	Provision	Oct 1997
<input checked="" type="checkbox"/>	52.236-27   Site Visit (Construction).	FAR	Provision	Feb 1995
<input checked="" type="checkbox"/>	52.236-26   Preconstruction Conference.	FAR	Clause	Feb 1995
<input type="checkbox"/>	52.236-21   Specifications and Drawings for Construction.	FAR	Clause	Feb 1997
<input type="checkbox"/>	52.236-18   Work Oversight in Cost-Reimbursement Construction Contracts.	FAR	Clause	Apr 1984
<input type="checkbox"/>	52.236-15   Schedules for			

BACK CANCEL NEXT

5. After selecting the clauses you want to add to the template, click **ADD**.

- 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**.

**Create Template**

1 TEMPLATE DETAILS | **INCLUDE CLAUSES** | 3 EXCLUDE CLAUSES

**Clause Catalog**  
Select the clauses to include in the template

construction | FAR | --- Select a Clause Type ---

ADD

<input type="checkbox"/>	Clause	Source	Type	Effective Date
<input type="checkbox"/>	52.249-10   Default (Fixed-Price Construction).	FAR	Clause	Apr 1984
<input checked="" type="checkbox"/>	52.248-3   Value Engineering-Construction.	FAR	Clause	Oct 2020
<input checked="" type="checkbox"/>	52.246-21   Warranty of Construction.	FAR	Clause	Mar 1994
<input checked="" type="checkbox"/>	52.236-28   Preparation of Proposals-Construction.	FAR	Provision	Oct 1997
<input checked="" type="checkbox"/>	52.236-21   Specifications and Drawings for Construction.	FAR	Clause	Feb 1997
<input checked="" type="checkbox"/>	52.236-18   Work Oversight in Cost-Reimbursement Construction Contracts.	FAR	Clause	Apr 1984
<input checked="" type="checkbox"/>	52.236-15   Schedules for Construction Contracts.	FAR	Clause	Apr 1984
<input checked="" type="checkbox"/>	52.232-27   Prompt Payment for Construction Contracts.	FAR	Clause	Jan 2017
<input checked="" type="checkbox"/>	52.232-5   Payments under Fixed-Price Construction Contracts.	FAR	Clause	May 2014

BACK | CANCEL

**Included Clauses**  
Following clauses are included in the template

Search Clauses | --- Select a Source --- | --- Select a Clause Type ---

REMOVE

<input type="checkbox"/>	Clause	Source	Type	Effective Date
<input checked="" type="checkbox"/>	52.236-26   Preconstruction Conference.	FAR	Clause	Feb 1995
<input checked="" type="checkbox"/>	52.236-27   Site Visit (Construction).	FAR	Provision	Feb 1995
<input checked="" type="checkbox"/>	52.246-12   Inspection of Construction.	FAR	Clause	Aug 1996

BACK | CANCEL | **NEXT**

6. After adding the clauses you want to template to include, click **NEXT** to proceed to the **Excluded Clauses** step.
7. From **Clause Catalog**, click the **checkbox**  next to each clause that you want to the template to exclude.
  - Only one clause must be included or excluded from a template. If a clause is already included, this page is optional.
  - You can search for a specific clause or filter by **Source** and **Clause Type**.
  - Clauses that have been selected for inclusion cannot be excluded, and vice versa.

## Create Template

1 TEMPLATE DETAILS      2 INCLUDE CLAUSES      **EXCLUDE CLAUSES**

**Clause Catalog**  
Select the clauses to exclude from the template

construction      FAR      --- Select a Clause Type ---

**ADD** 

<input type="checkbox"/>	Clause	Source	Type	Effective Date
<input checked="" type="checkbox"/>	52.249-10   Default (Fixed-Price Construction).	FAR	Clause	Apr 1984
<input type="checkbox"/>	52.248-3   Value Engineering-Construction.	FAR	Clause	Oct 2020
<input checked="" type="checkbox"/>	52.246-21   Warranty of Construction.	FAR	Clause	Mar 1994
<input checked="" type="checkbox"/>	52.236-28   Preparation of Proposals-Construction.	FAR	Provision	Oct 1997
<input type="checkbox"/>	52.236-21   Specifications and Drawings for Construction.	FAR	Clause	Feb 1997
<input type="checkbox"/>	52.236-18   Work Oversight in Cost-Reimbursement Construction Contracts.	FAR	Clause	Apr 1984
<input type="checkbox"/>	52.236-15   Schedules for Construction Contracts.	FAR	Clause	Apr 1984
<input type="checkbox"/>	52.232-27   Prompt Payment for Construction Contracts.	FAR	Clause	Jan 2017
<input type="checkbox"/>	52.232-5   Payments under Fixed-Price Construction Contracts.	FAR	Clause	May 2014

**Excluded Clauses**  
Following clauses are excluded by this template

Search Clauses      --- Select a Source ---      --- Select a Clause Type ---

**REMOVE**

<input type="checkbox"/>	Clause	Source	Type	Effective Date
No clauses available				

**BACK**      CANCEL      **CREATE**

8. After selecting the clauses you want the template to exclude, click **ADD**.
- The selected clauses will appear in the Excluded 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**.

## Create Template

1 TEMPLATE DETAILS      2 INCLUDE CLAUSES      **EXCLUDE CLAUSES**

**Clause Catalog**  
Select the clauses to exclude from the template

construction      FAR      --- Select a Clause Type ---

**ADD**

<input type="checkbox"/>	Clause	Source	Type	Effective Date
<input type="checkbox"/>	52.248-3   Value Engineering-Construction.	FAR	Clause	Oct 2020
<input type="checkbox"/>	52.236-21   Specifications and Drawings for Construction.	FAR	Clause	Feb 1997
<input type="checkbox"/>	52.236-18   Work Oversight in Cost-Reimbursement Construction Contracts.	FAR	Clause	Apr 1984
<input type="checkbox"/>	52.236-15   Schedules for Construction Contracts.	FAR	Clause	Apr 1984
<input type="checkbox"/>	52.232-27   Prompt Payment for Construction Contracts.	FAR	Clause	Jan 2017
<input type="checkbox"/>	52.232-5   Payments under Fixed-Price Construction Contracts.	FAR	Clause	May 2014
<input type="checkbox"/>	52.228-16   Performance and Payment Bonds-Other Than Construction.	FAR	Clause	Nov 2006
<input type="checkbox"/>	52.228-15   Performance and Payment Bonds-Construction.	FAR	Clause	Jun 2020
<input type="checkbox"/>	52.227-4   Patent Indemnity-			

**Excluded Clauses**  
Following clauses are excluded by this template

Search Clauses      --- Select a Source ---      --- Select a Clause Type ---

**REMOVE**

<input type="checkbox"/>	↓ Clause	Source	Type	Effective Date
<input type="checkbox"/>	52.236-28   Preparation of Proposals-Construction.	FAR	Provision	Oct 1997
<input type="checkbox"/>	52.246-21   Warranty of Construction.	FAR	Clause	Mar 1994
<input type="checkbox"/>	52.249-10   Default (Fixed-Price Construction).	FAR	Clause	Apr 1984

**BACK**      CANCEL       **CREATE**

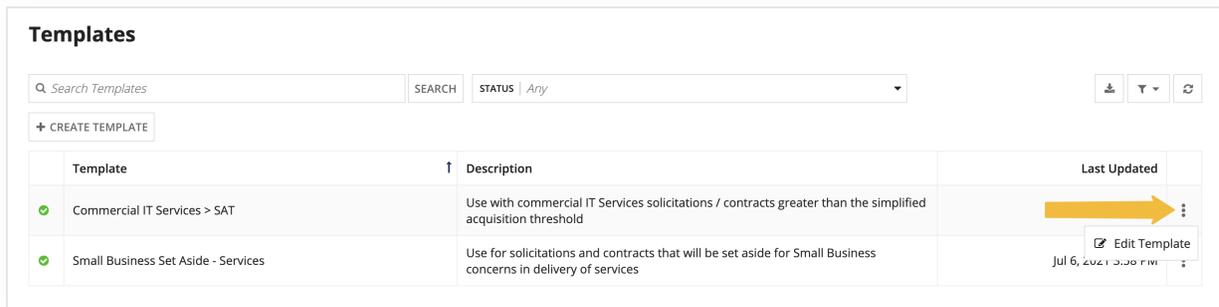
9. After adding the clauses you want to exclude, click **CREATE** to create the template.

## Updating an existing template

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

To update a template:

1. Click on the  icon at the left of each template.



Template	Description	Last Updated
Commercial IT Services > SAT	Use with commercial IT Services solicitations / contracts greater than the simplified acquisition threshold	
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 3:20 PM

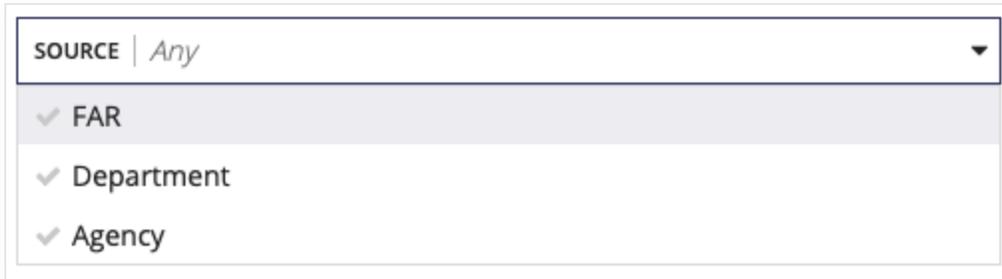
2. Select the **Edit Template** action that displays.
3. If desired, update the **Template Name**, **Description**, or both.
4. *(Optional)* Change the template **Status**.
5. In the **Clause Catalog** section, select one or more clauses that you want to include with the template.
  - You can search for a specific clause in the clause list or filter the clauses by **Source** or **Clause Type**.
6. After selecting all of the clauses you want to include, click **ADD**.
  - The selected clauses will appear in the Included Clauses section.
7. 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**.
8. After selecting the clauses you want to remove, click **REMOVE**.
9. After modifying the template, click **NEXT**.
10. In the **Clause Catalog** section, select one or more clauses that you want the template to exclude.
  - You can search for a specific clause in the clause list or filter the clauses by **Source** or **Clause Type**.
11. After selecting the clauses you want the template to exclude, click **ADD**.
  - The selected clauses will appear in the Excluded Clauses section.
12. In the **Excluded Clause** section, select one or more clauses that you want to remove from the template. Any clauses you remove are no longer excluded from the template.
  - You can search for a specific clause or filter by **Source** and **Clause Type**.
13. After selecting the clauses you want to remove, click **REMOVE**.
14. After modifying the template, click **SAVE**.

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
3 VALUES (null, '<New Label>', '<Type>', 1, '<Username>', CURRENT_TIMESTAMP(), '<
4 (null, '<New Label>', '<Type>', 1, '<Username>', CURRENT_TIMESTAMP(), '<Usernam
```

## 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.

<code>REF_DATA_ID</code>	<code>LABEL</code>	<code>TYPE</code>	<code>IS_ACTIVE</code>
1	FAR	Source	1
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 local!refData: rule!AS_GCM_QE_getRefDataByTypes(  
2   refTypes: {  
3     /* Evaluation Status */  
4     cons!AS_GCM_REF_TYPE_EVALUATION_STATUS,  
5   }  
6 )
```

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 Acquisition.gov

## Acquisition.gov APIs

### Introduction

This page outlines how GCA integrates with Acquisition.gov to allow GCA to reflect the most recent data available.

### Acquisition.gov API endpoint

Using an API, GCA is able to retrieve clauses and populate with clauses. The table below lists the Acquisition.gov API endpoint and the corresponding Appian object that references it.

API Endpoint	Appian Object
<a href="https://api.github.com/repos/">https://api.github.com/repos/</a>	AS_GCM_INT_getAcquisitionGitTree

The expression rule, AS\_GCM\_INT\_getAcquisitionGitTree, is used to call these Acquisition.gov APIs and will update the clause record. Currently, GCA extracts the following API fields in order to fully update the clause record fields:

Acquisition.gov API	Clause Automation Field	API Field
GSA/GSA-Acquisition-FAR/git/trees/	tree	tree
GSA/GSA-Acquisition-FAR/git/blobs/	sha	sha
GSA/GSA-Acquisition-FAR/contents/html/copypaste-AllTopic/	uniquenumber.html	name

# 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.

# 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	AS GAM Appian	<ul style="list-style-type: none"> <li>NA</li> </ul>

<b>Actions with Security Group</b>	<b>Security Group</b>	<b>Business Groups with Access</b>
for Clause Automation solution.	Administrators	
View the Clause Automation site.	AS GCM Clause Management Site Access	<ul style="list-style-type: none"> <li>• All Business Users</li> </ul>
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	
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	
Create or update questionnaire rule.	AS GCM Create or Update Rule PM Access	
Remove a Clause.	AS GCM Remove Clause PM Access	

# 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 <a href="#">Appian icons</a> 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.

<b>Name</b>	<b>MySQL Data Type</b>	<b>Appian Data Type</b>	<b>Description</b>
SORT_ORDER	int(11)	Number (integer)	Determines the order of values displayed in the dropdown.
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:

<b>REF_DATA_ID</b>	<b>LABEL</b>	<b>TYPE</b>	<b>REF_ICON</b>	<b>REF_COLOR</b>	<b>IS_ACTIVE</b>
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

# Acquisition Data Processing Reference Page

## Introduction

The GCA solution provides additional processing to enhance the data retrieved from Acquisition.gov. These enhancements already take into account scenarios where GSA could update the raw data to render these enhancements obsolete. This reference page provides users with information about the added functionality GCA provides.

## Data Enhancements

GCA performs post processing after weekly or manual syncs with Acquisition.gov, which includes:

- Identifying many of the editable clauses automatically
- Identifying many of the clauses with fill-ins automatically
- Retrieving the effective date of clauses automatically
- Retrieving the effective date of alternate clauses rather than the effective dates of the original clauses separately
- Adding in spaces that are missing in the clause text
- Updating titles of existing clauses when title changes are present in Acquisition.gov

Note that in some cases, if the necessary tags or data are unavailable, GCA will leave the editable or fill-in values in the clause blank.

# Data Relationships

## Introduction

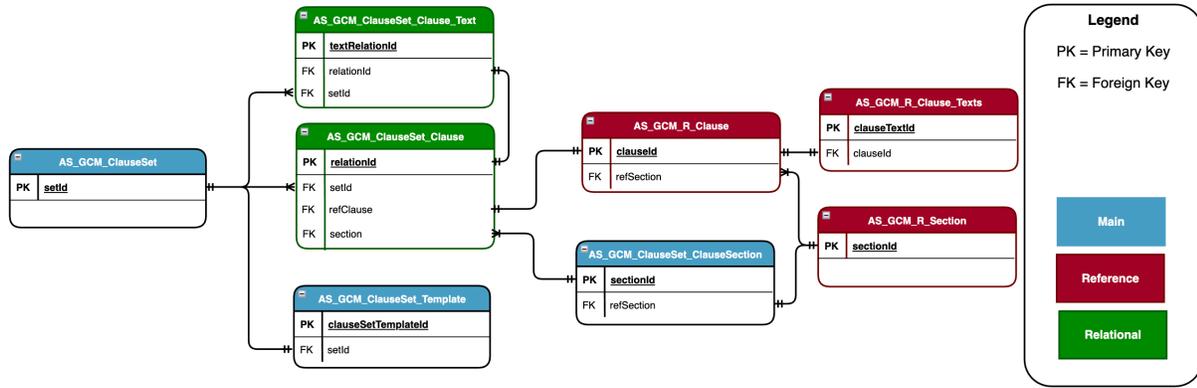
The central custom data types and database entities in Clause Automation (GCA) are associated with clauses, clause sets, questionnaires, and rules. Understanding the relationships between these entities can help you understand how the data in the application works together.

The entity relationship diagrams (ERD) on this page illustrate the main entities used in Clause Automation solution and their relationships to each other.

## Clause Set and Clauses Entity Relationship Diagram

This ERD covers two things. First, the diagram illustrates the main relationships between the clauses and clause sets in the GCA solution. Second, it provides a graphic overview of the tables used for the reference list of all clauses available in the GCA solution.

## Clause Set and Clause Tables



## Checklist Entity Relationship Diagram

This ERD describes the relationships between the questionnaires and their associated rules that are configured by privileged users and used by contracting users.

### Questionnaires and Rules

