



# **Clause Selection**

**February 27, 2001**

# Table of Contents

---

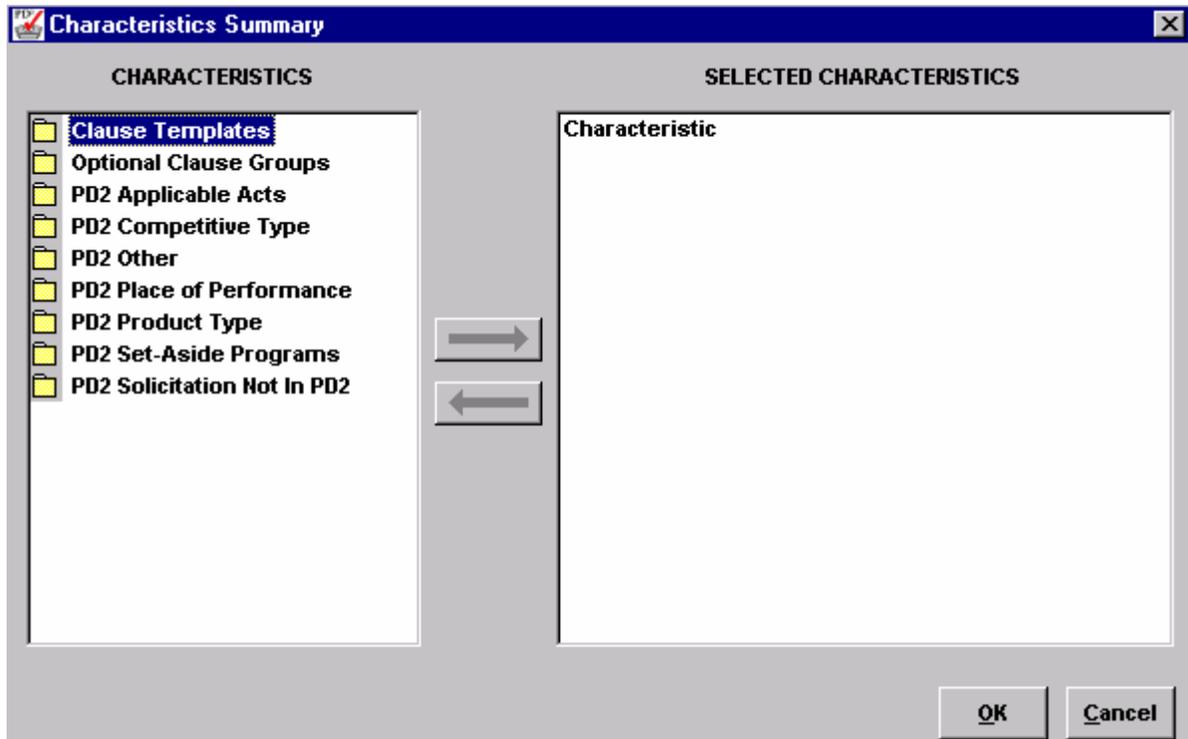
<b>1. CLAUSE AUTO-SELECTION.....</b>	<b>1</b>
1.1 CHARACTERISTICS.....	1
1.2 CLASSIFICATION.....	3
1.3 AUTO SELECTION CLAUSES.....	4
1.4 CLAUSE INCORPORATION.....	5
1.5 CLAUSE APPEARANCE.....	6
<b>2. THE CLAUSES TAB.....</b>	<b>7</b>
2.1 ADDING INDIVIDUAL CLAUSES.....	7
2.2 EDITING CLAUSES.....	8
2.3 USAGE.....	9
2.4 ADD TEXT.....	9
2.5 REFRESH.....	10

# 1. CLAUSE AUTO-SELECTION

---

## 1.1 Characteristics

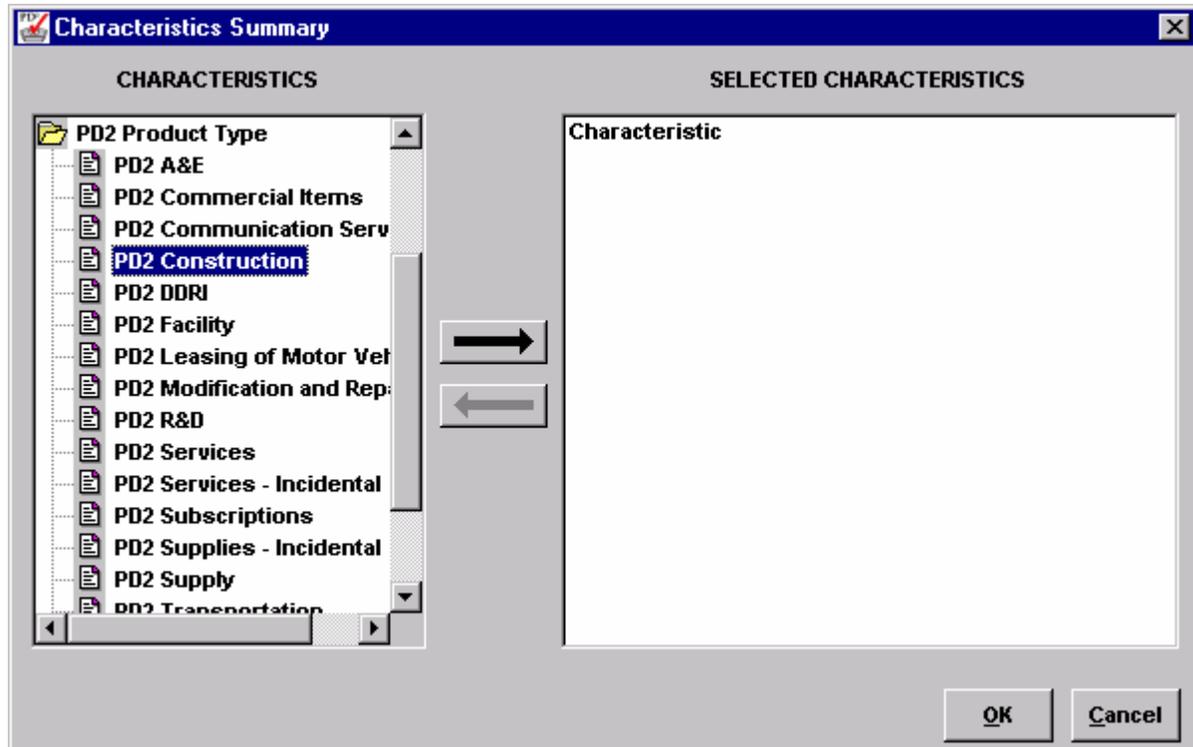
Select **Document Options** → **Characteristics** from the menu bar before running auto-clause selection. In the **Characteristic Summary** window users identify the criteria for auto-clause selection.



In the **Characteristics Summary** window, there are two panels. The available characteristics are listed in the *Characteristics* panel. The characteristics designated to the documents are listed in the *Selected Characteristics* panel.

Double-click on the folder icons to open them. The list of characteristics display below the folder icon. Highlight the characteristic in the *Characteristics* panel, and click the [→] button to move the characteristic to the *Selected Characteristics* panel. All characteristics that display in this panel are assigned to this document.

Click [OK] to save the characteristics.



There is no limit to the number of characteristics that may be selected in the *Selected Characteristics* panel.

---

**Note:** In order for Auto-Clause Selection to retrieve a list of clauses, one priced CLIN with a total amount must be entered in the **Line Item Detail** window, and one characteristic from the **PD2 Product Type** folder must be selected in the **Characteristics Summary** window. See <http://kb.amsinc.com/ID/9108/>.

---

There are certain assumed characteristics that exist, by default, in all documents in PD<sup>2</sup>. If other characteristics are more applicable, be certain to select these unique characteristics in the **Characteristics Summary** window. The assumed characteristics are listed below:

- SAP
- Full and Open Competition
- Performance in the USA
- Full Funding

## 1.2 Classification

Select **Document Options** → **Classification**, and enter the document type and format in the **Document Classification** window.

**Note:** The document format is often listed in the **Document Format** field, by default. Be certain to select a format from the **Document Format** drop-down list box if one has not been selected. See KB article 15810 <http://kb.ams.com/ID/15810/> for instruction on how select formats, add formats, and set default formats in the **Document Classification** window.

IDC Constraints		
	Minimum	Maximum
Contract Quantity:		
Contract Amount:		
Order Quantity:		
Order Amount:		

Click **[OK]** to save changes.

### 1.3 Auto Selection Clauses

After populating the **Characteristics Summary** and the **Document Classification** windows, run auto-clause selection by selecting **Document Options → Auto Selection Clauses**. When prompted to save the document before the selection begins, click the **[Yes]** button. A menu of applicable clauses, based on the criteria entered in the PD<sup>2</sup> form, will be listed in the **Select Clauses** window. The clauses that display in the **Select Clauses** window are not *selected* for the document; they are the clauses *suggested* for the document.

Clause Number	Required	Incorporation		
Add				
<input checked="" type="checkbox"/> 52.211-12 Liquidated Damages--Construction	OPT	<input type="radio"/> By Reference	<input checked="" type="radio"/> By Full Text	<input checked="" type="checkbox"/> Not Included
<input checked="" type="checkbox"/> 52.232-33 Payment by Electronic Funds Transfer--Central Contractor Registration	RWA	<input checked="" type="radio"/> By Reference	<input type="radio"/> By Full Text	<input type="checkbox"/> Not Included
<input checked="" type="checkbox"/> 52.232-36 Payment by Third Party	RWA	<input checked="" type="radio"/> By Reference	<input type="radio"/> By Full Text	<input checked="" type="checkbox"/> Not Included

PD<sup>2</sup> only incorporates those clauses, with the checkbox selected, into the *Clauses* tab when **[OK]** is clicked. The checkboxes for clauses are selected by default in this window. Click the **[Clear All]** button to deselect the checkboxes for all clauses listed. Click **[Select All]** to re-select the checkboxes for all clauses listed. Click the **[Select All]** button, and deselect the checkboxes for clauses individually, or click the **[Clear All]** button and reselect the checkboxes for clauses individually.

---

**Note:** The user must select the checkbox for a clause in the **Select Clauses** window, in order for that clause to display in the *Clauses* tab. By selecting the **Not Included** radio button, the clause will display in the *Clauses* tab, but not display in the generated document. The user has the option to select the **Not Included** radio button in the **Select Clauses** window or in the *Clauses* tab.

---

Click **[OK]** in the **Select Clauses** window. All clauses, selected in this window, will automatically populate into the *Clauses* tab of the document.

Clause/CLIN Number	Editable	Required	Incorporation
<b>SECTION: 00010 - Solicitation Contract Form</b>			
<b>0001</b> Project A	Editable		
<b>Delivery Information</b> Classification:	Editable		<input type="checkbox"/> Not Included
<b>Inspection/Acceptance Terms</b> Classification:	Editable		<input type="checkbox"/> Not Included
<b>SECTION: 00100 - Bidding Schedule/Instructions to Bidders</b>			
<b>52.232-36</b> Payment by Third Party	Read-Only	R/WA	<input checked="" type="radio"/> By Reference <input type="radio"/> By Full Text <input checked="" type="checkbox"/> Not Included
<b>SECTION: 00700 - Contract Clauses</b>			
<b>52.211-12</b> Liquidated Damages--Construction	Fill-In	OPT	<input type="radio"/> By Reference <input checked="" type="radio"/> By Full Text <input checked="" type="checkbox"/> Not Included

## 1.4 Clause Incorporation

If the **Not Included** radio button was selected for a clause in the **Select Clauses** window, the clause will display in the *Clauses* tab, with the **Not Included** radio button selected. Review the clauses listed in the *Clauses* tab, and select the **Not Included** radio button for any additional clauses that should not display in the generated document.

---

**Note:** By selecting the **Not Included** radio button, the clause is listed in the *Clauses* tab, for future modifications and available for selection, but not generated in the Microsoft Word document.

---

## 1.5 Clause Appearance

Clauses, listed in the *Clauses* tab, are marked and identified by the clause number and description that displays at the left of the window. “RWA” indicates that the clause is required when applicable, “REQ” indicates that the clause is required and “OPT” indicates that the clause is optional.

Clauses are also identified as “Editable”, “Read Only”, or “Fill-in”. If a clause is marked “Fill-in”, the clause must be opened in Microsoft Word, in the *Clauses* tab, prior to generation and text must be entered in the form fields (identified as gray blocks or “fill in the blanks”). After a clause has been edited a red stamp, that reads “Edited”, displays across the clause in the *Clauses* tab.

---

**Note:** To edit a fill-in clause, highlight the clause on the *Clauses* tab, and click the **[Edit]** button or double-click on the clause. The clause text opens in a Microsoft Word format. Enter text in the gray shaded areas, as directed in the text of the clause. To enter text, or an “X” to indicate a checkmark, click once in the gray shaded area, until the cursor is blinking. Type the text. Use the arrow button on the keyboard to move the cursor with the gray shaded areas (the space bar does not work). Select **File→Update** to save changes, and **File→Exit** to exit the document, and return to the *Clauses* tab.

---

On the *Clauses* tab, the **By Reference** and **By Full Text** radio button selection indicates whether the entire text of the clause, or a line of text referencing the clause displays in the generated document. If **User Editable** is selected in the **Clauses Task** for this clause, the user has the option to change the radio button from **By Reference** to **By Full Text** or **By Full Text** to **By Reference** in the *Clauses* tab.

---

**Note:** See KB 18475 <http://kb.amsinc.com /ID/18475/> for instruction to set up and change the default settings for clauses in the **Clause Task of System Administration**. This paper is written for System Administrators who create and maintain local clauses, but provides useful instruction for updating settings for all standard clauses as well.

---

## 2. THE CLAUSES TAB

### 2.1 Adding Individual Clauses

If there are clauses that need to be added to the document that were not included in the **Select Clauses** window, after running the auto-clause selection, click the **[Add Clause]**

Clause/CLIN Number	Editable	Required	Incorporation
<b>SECTION: 00010 - Solicitation Contract Form</b>			
<b>0001</b> Project A	Editable		
<b>Delivery Information</b> Classification:	Editable	Special Instructions:	<input type="checkbox"/> Not Included
<b>Inspection/Acceptance Terms</b> Classification:	Editable	Special Instructions:	<input type="checkbox"/> Not Included
<b>SECTION: 00100 - Bidding Schedule/Instructions to Bidders</b>			
<b>52.232-36</b> Payment by Third Party	Read-Only	RWA	<input checked="" type="radio"/> By Reference <input type="radio"/> By Full Text <input checked="" type="checkbox"/> Not Included
<b>SECTION: 00700 - Contract Clauses</b>			
<b>52.211-12</b> Liquidated Damages--Construction	Fill-In	<input type="radio"/> By Reference <input checked="" type="radio"/> By Full Text	<input checked="" type="checkbox"/> Not Included

button.

When the **Add Clauses** window opens, limit the search by selecting the clause type from the **Regulation** drop-down list box. To search by clause number, select the **Clause Number** radio button (this is the default selection). To search by the clause title, select the **Clause Title** radio button. Enter the search criteria in the search window, where the wildcard symbol “%” displays. Click the **[Search]** button.

**Add Clauses**

Search By:  Clause Number  Clause Title Regulation: ALL

52.2%

Clause Number	Clause Title	Effective
52.202-1	Definitions	Oct 1995
52.202-1 Alt I	Definitions (Oct 1995) --Alternate I	Apr 1984
52.203-2	Certificate Of Independent Price Determination	Apr 1985
52.203-3	Gratuities	Apr 1984
52.203-5	Covenant Against Contingent Fees	Apr 1984
52.203-6	Restrictions On Subcontractor Sales To The Government	Jul 1995
52.203-6 Alt I	Restrictions On Subcontractor Sales To The Government (Jul Oct 1995) -- Alternate I	
52.203-7	Anti-Kickback Procedures	Jul 1995
52.203-8	Cancellation, Rescission, and Recovery of Funds for Illegal or Improper Activity	Jan 1997
52.203-10	Price Or Fee Adjustment For Illegal Or Improper Activity	Jan 1997
52.203-11	Certification And Disclosure Regarding Payment To Influence Certain Federal Transactions	Apr 1991

Section: 00700

Highlight the clause(s) in the search results window, below the search criteria field. Select a section from the **Section** drop-down list box and click **[OK]**. A common mistake that user make, is that they forget to highlight the clause, before clicking **[OK]**.

The clauses will display in the *Clauses* tab in the section that is selected in the **Section** drop-down list box.

## 2.2 Editing Clauses

As indicated in Section 1.5, clauses that have the text “Editable” displayed next to the number may be edited in the *Clause* tab. To edit a clause, double-click on the clause, or highlight it and click the **[Edit]** button. When Microsoft Word opens make changes to the text of the clause, as necessary. Select **File→Update** to save the changes. Select **File→Exit** to exit the document.

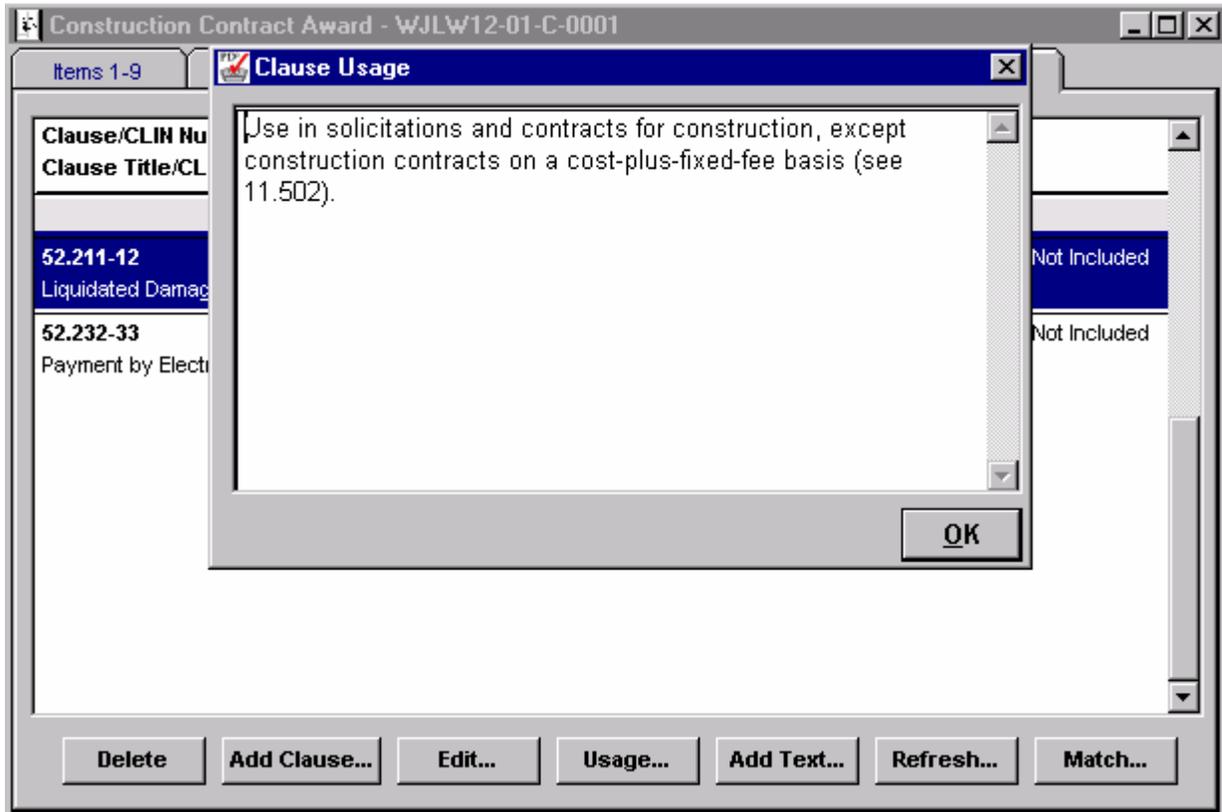
---

**Note:** After a clause has been edited a red stamp that reads “Edited” displays across the clause in the *Clauses* tab.

---

## 2.3 Usage

Click the [Usage] button in the *Clauses* tab to open the **Clause Usage** window. This window provides a brief description of when and how the clause should be used.



After reading the explanatory text, click [OK] to return to the *Clauses* tab.

## 2.4 Add Text

The Add Text function provides the user the opportunity to add free form text or a Microsoft word file to the body of the generated document. Click the [Add Text] button. In the **New Text Item** window, enter at the minimum, a description in the **Description**

The image shows a screenshot of the "New Text Item" dialog box. It has a title bar with a red "X" icon and the text "New Text Item". The dialog contains four fields: "Description:" with a large text area, "Special Instructions:" with a smaller text area, "Classification:" with a dropdown menu, and "Section:" with a dropdown menu showing "00700". At the bottom right, there are "OK" and "Cancel" buttons.

field, and select a section from the **Section** drop-down list box.

Click **[OK]**. This information will create a placeholder in the *Clauses* tab under the selected section.

Clause/CLIN Number	Editable	Required	Incorporation
<b>SECTION: 00010 - Solicitation Contract Form</b>			
<b>0001</b> Project A	Editable		
<b>Delivery Information</b> Classification:	Editable		<input type="checkbox"/> Not Included
<b>Inspection/Acceptance Terms</b> Classification:	Editable		<input type="checkbox"/> Not Included
<b>SECTION: 00100 - Bidding Schedule/Instructions to Bidders</b>			
<b>52.232-36</b> Payment by Third Party	Read-Only	RWA	<input checked="" type="radio"/> By Reference <input type="radio"/> By Full Text <input checked="" type="checkbox"/> Not Included
<b>SECTION: 00700 - Contract Clauses</b>			
<b>Statement of Work</b> Classification: Statement of Work	Editable		<input type="checkbox"/> Not Included

Highlight the placeholder and click the **[Edit]** button. A blank document opens in Microsoft Word. Type the free form text into the blank Microsoft Word document, or import an existing file, by selecting **Insert→File** from the menu bar. Search for the file, saved to a network directory, and click the **[Open]** button to insert the file, into the blank Microsoft Word document. Select **File→Update** periodically as changes are made to the document. Select **File → Close and Return** to save and close the document, and return to the **Clauses** tab. When the document is generated, the text from the **[Add Text]** item displays in the body of the continuation pages, in the section specified in the **New Text Item** window.

---

**Note:** See KB 42069 <http://kb.amsinc.com/ID/42069/> for an explanation of how clauses are listed in PD<sup>2</sup> v4.1e, and where the text from **[Add Text]** clauses are listed once the document has been generated.

---

## 2.5 Refresh

When the **[Refresh]** button is clicked, PD<sup>2</sup> validates that all clauses listed in the *Clauses* tab are current and provides a list of clauses to be updated in accordance with regulations.