

Create Contract Expert Rules

Audience: Procurement Contract Administrators

Purpose: You can set up Contract Expert rules to apply contract terms templates automatically to contracts, to suggest additional clauses for insertion during contract terms authoring, and to identify any contract deviations from company policy.

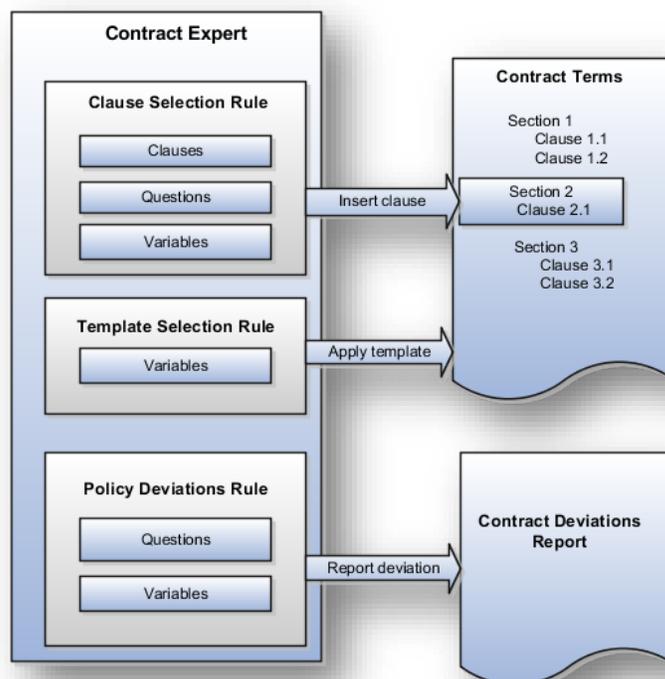
Each rule comprises conditions that must be met and the rule results. You can base rule conditions on:

- The presence of another clause already in the contract
- The value of a system variable or a user variable
- Questions that the contract author must answer

Different Contract Expert rule types support different condition types, as illustrated in the following figure.

- Clause selection rules, which can default individual clauses and sections into a contract, can be based on clauses, questions, and variables.
- Template selection rules, which identify the default contract terms template for the contract, can be based on variables only.
- Policy deviation rules, which identify contract deviations from company policies, use questions and variables only.

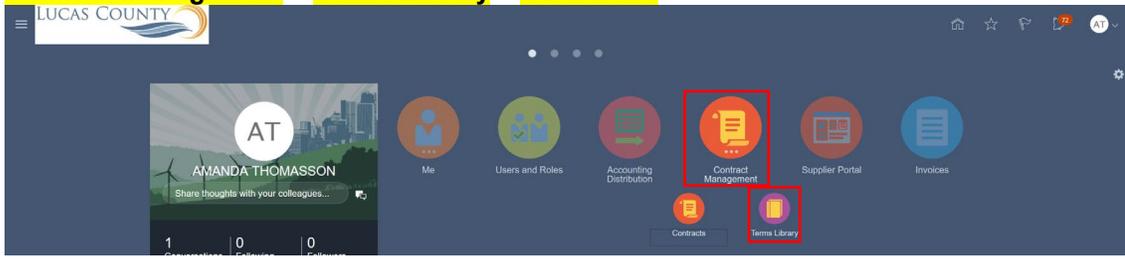
The Contract Expert figure here illustrates the Clause Selection, Template Selection, and Policy Deviation Contract Expert rules.

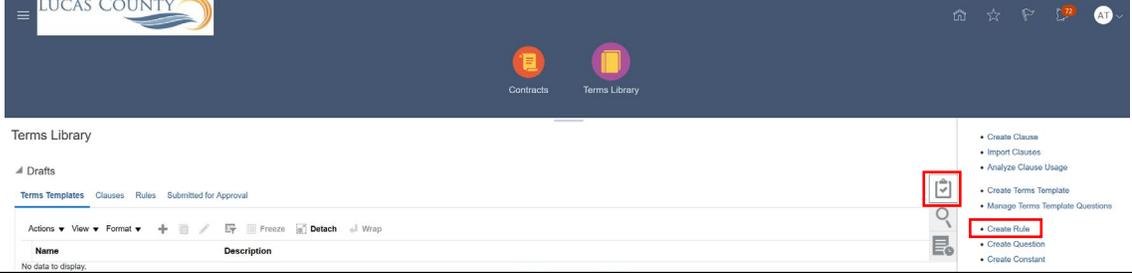
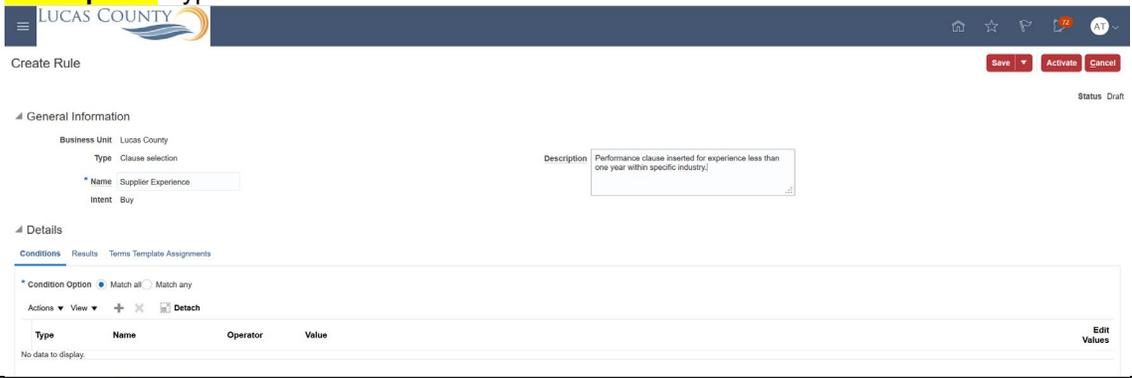
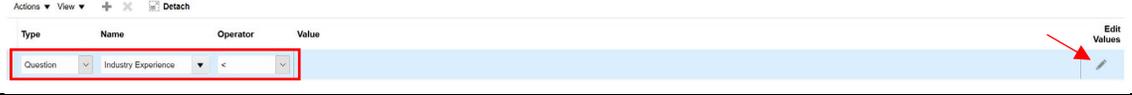


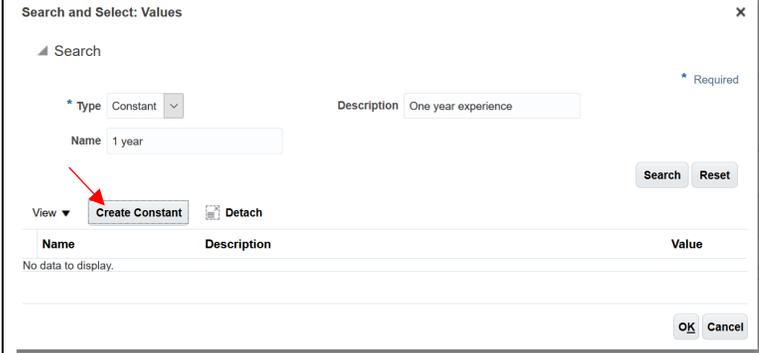
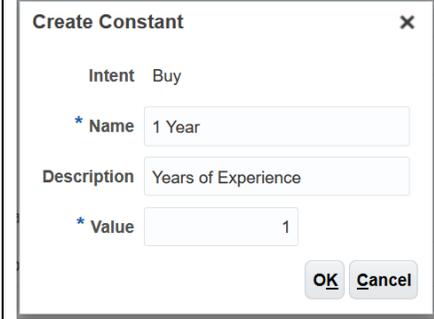
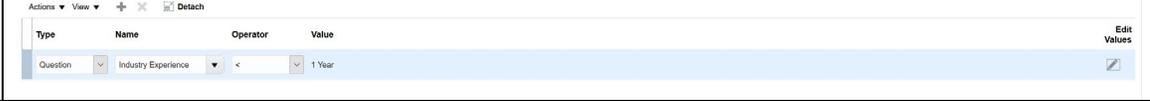
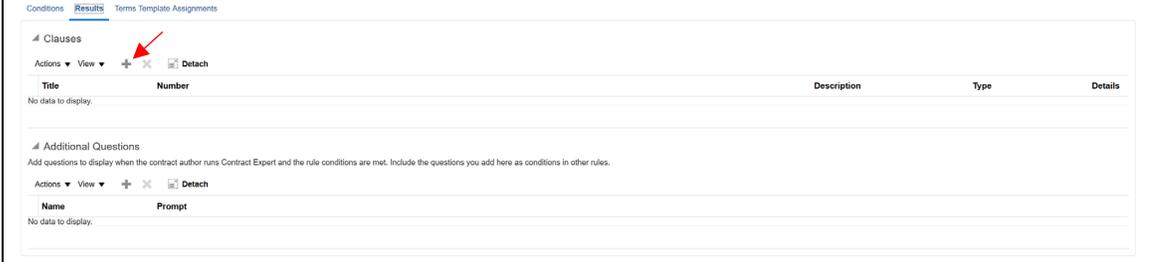
Key rule properties include:

- All rules can use multiple conditions linked together with either the AND or OR logical operators.
- All rules: clause selection, policy deviation, or template selection cannot start with a numeric prefix.
- The values of non-numeric conditions are supplied by value sets.
- The values for numeric conditions are supplied by constants.
- Rule types that permit the inclusion of questions can trigger follow-up questions, permitting you to chain rules together.
- Rules are restricted to the specific business unit and the contract intent where you create them.
- Rules do not get copied when you copy a global contract terms template to another business unit.
- Conditions support both logical and numeric operators:
 - IS
 - IS NOT
 - IN (allows the selection of multiple values)
 - NOT IN (allows the selection of multiple values)
 - >=: (greater than or equal to)
 - <=: (less than or equal to)
 - =: (equal to)
 - > (greater than)
 - < (less than)

This job aid will assist you in creating contract Expert Rules.

Step	Action
1	<p>Contract Management > Terms Library > Task Menu.</p> 
2	<p>Select Create Rule.</p>

	
3	<p>Business Unit: Select Lucas County Type: Clause Selection Name: Name of Rule (In this example Supplier Experience is entered.) Intent: Buy. Description: Type text to describe the Rule.</p> 
4	<p>Click the + icon to insert a condition row.</p> 
5	<p>Enter the following to define the condition: Type: Question Name: Select a Question (In this example Industry Experience is selected). Operator: Select a value (In this example < is selected.) Click Edit Values</p> 
6	<p>Enter the following Type: In this example 'Constant' is selected. Name: In this example '1 year'. Description: In this example One year experience is used. Click Create Constant.</p>

	
<p>7</p>	<p>Enter the following: Name: In this example '1 Year' was entered. Description: In this example 'Years of Experience' was entered. Value: '1' Click OK</p>  
<p>8</p>	<p>Click the Results link and click the + icon to add.</p> 
<p>9</p>	<p>Add Clause = Select a clause from the list. In this example Performance Requirements was selected. Click OK.</p>

	<p>Add Clause X</p> <p>Search <input type="text" value="Title"/> <input type="text"/> <input type="button" value="Q"/></p> <table border="1"> <thead> <tr> <th>Title</th> <th>Nu</th> <th>De</th> <th>Type</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td>ARTICLE ONE</td> <td>20C</td> <td></td> <td>Agreement</td> <td></td> </tr> <tr> <td>ARTICLE SEVEN</td> <td>20C</td> <td></td> <td>Agreement</td> <td></td> </tr> <tr> <td>ARTICLE NINE</td> <td>201</td> <td></td> <td>Agreement</td> <td></td> </tr> <tr> <td>Legal Framework</td> <td>10C</td> <td></td> <td>General terms</td> <td></td> </tr> <tr> <td>Bid Alterations, Amendments, and Alternate Bids</td> <td>101</td> <td></td> <td>General terms</td> <td></td> </tr> <tr> <td>Taxes</td> <td>101</td> <td></td> <td>General terms</td> <td></td> </tr> <tr> <td>Compliance with the Law</td> <td>101</td> <td></td> <td>General terms</td> <td></td> </tr> <tr> <td>Non-Acceptance Criteria for Work, Materials and Service</td> <td>102</td> <td></td> <td>General terms</td> <td></td> </tr> <tr style="border: 2px solid red;"> <td>Performance Requirements</td> <td>102</td> <td></td> <td>General terms</td> <td></td> </tr> <tr> <td>Co-Op Opportunities</td> <td>102</td> <td></td> <td>General terms</td> <td></td> </tr> </tbody> </table> <p style="text-align: right;"><input type="button" value="OK"/> <input type="button" value="Cancel"/></p>	Title	Nu	De	Type	Details	ARTICLE ONE	20C		Agreement		ARTICLE SEVEN	20C		Agreement		ARTICLE NINE	201		Agreement		Legal Framework	10C		General terms		Bid Alterations, Amendments, and Alternate Bids	101		General terms		Taxes	101		General terms		Compliance with the Law	101		General terms		Non-Acceptance Criteria for Work, Materials and Service	102		General terms		Performance Requirements	102		General terms		Co-Op Opportunities	102		General terms	
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11	<p>Click the Terms Template Assignments link and click the + icon to add to a template</p> <p>Details</p> <p>Conditions Results <u>Terms Template Assignments</u></p> <p><input type="checkbox"/> Apply to all terms templates Use the check box to apply this rule to all terms templates or add specific templates below.</p> <p>Terms Templates</p> <p>Actions View Detach</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Status</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td colspan="3">No data to display.</td> </tr> </tbody> </table>	Name	Status	Description	No data to display.																																																			
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13	Click Activate and Finish .																																																							

Edit Rule: Supplier Experience Save Activate Cancel
Status Draft

General Information

Business Unit: Lucas County
 Type: Clause selection
 * Name: Supplier Experience
 Intent: Buy
 Created By: AMTHOMA
 Creation Date: 9/4/19

Description: Performance clause inserted for supplier experience less than one year.
 Last Updated By: AMTHOMA
 Last Updated Date: 9/4/19

Details

Conditions Results Terms Template Assignments

Apply to all terms templates
 Use the check box to apply this rule to all terms templates or add specific templates below.

Terms Templates

Actions View + Detach

Name	Status	Description
Services Agreement	Approved	Purchasing 2019 Contract - Services Agreement