

Default Editor for New Draft Agreements

AIA Contract Documents online service offers two options for editing agreement documents depending on your needs:

- Offline - using Microsoft® Office Word
- Online - using the Online Editor

This quick guide provides steps on how to **set your default editor for new draft agreements**. **Note:** This applies to new draft agreements creating from **Standard Templates** only and not from **Custom Templates**. See the list of AIA Contract Documents [here](#) to help you differentiate between agreements vs. forms. Note, except for G202-2013 Project BIM Protocol Form agreements (they cannot be opened online), all other agreements can be edited online or offline.

What is an Agreement vs. a Form?

Agreements

- A, B, E and select C and G Series documents
- Can be edited within the fillpoints << >> ,
- Standard text can be added or removed
- Clauses can be inserted
- Open offline in Word format

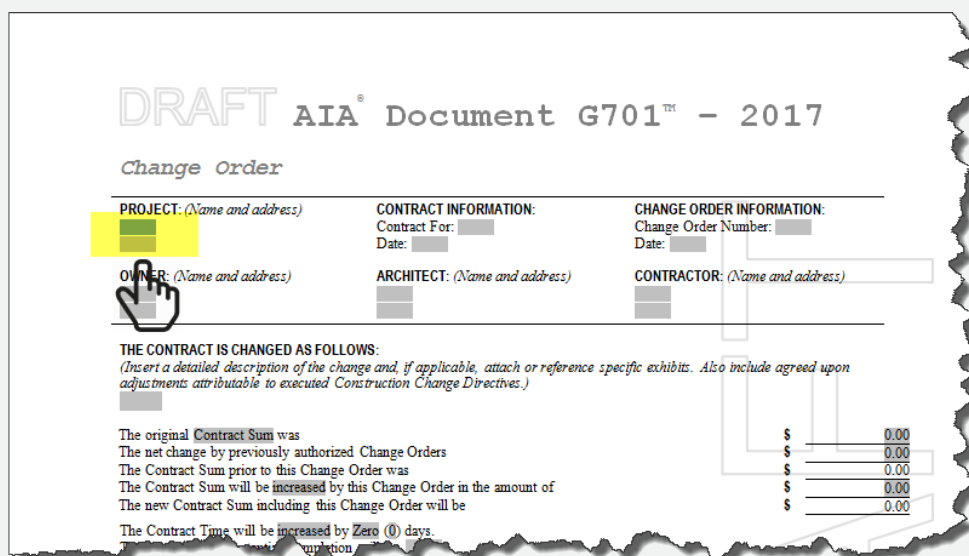
Example:



Forms

- C,D,G series
- Text is locked down with certain fill points that are shaded in grey, which can be edited
- Some forms open offline in Excel

Example:



DRAFT AIA® Document G701™ - 2017

Change Order

PROJECT: (Name and address)
[Shaded grey box]

CONTRACT INFORMATION:
Contract For: [Shaded grey box]
Date: [Shaded grey box]

CHANGE ORDER INFORMATION:
Change Order Number: [Shaded grey box]
Date: [Shaded grey box]

OWNER: (Name and address)
[Shaded grey box]

ARCHITECT: (Name and address)
[Shaded grey box]

CONTRACTOR: (Name and address)
[Shaded grey box]

THE CONTRACT IS CHANGED AS FOLLOWS:
(Insert a detailed description of the change and, if applicable, attach or reference specific exhibits. Also include agreed upon adjustments attributable to executed Construction Change Directives.)
[Shaded grey box]

The original Contract Sum was \$ 0.00
The net change by previously authorized Change Orders \$ 0.00
The Contract Sum prior to this Change Order was \$ 0.00
The Contract Sum will be increased by this Change Order in the amount of \$ 0.00
The new Contract Sum including this Change Order will be \$ 0.00
The Contract Time will be increased by Zero (0) days.

Benefits and Limitations with Offline editing vs. Online editing

Offline editing is recommended when large or complex edits are expected. Additional details regarding the benefits of editing documents offline vs online are included below.

Offline Editing

Use offline editing if:

- You would like to edit your agreements using Microsoft® Office Word,
- You want the ability to work offline without an Internet connection,
- You will be making substantial and/or more complex edits such as adding or editing tables, inserting numbering and bullets, etc.
- You would like to leverage the full functionality of Word

Limitations:

- Cannot utilize the online Share For Review function
- Cannot insert clauses from the library

Online Editing

Use online editing if:

- You would like to make quick and small/simple changes such as making a correction,
- Inserting a picture,
- Inserting Contacts from your distribution list
- You don't have Microsoft® Office Word desktop software on your computer or mobile device, e.g. editing using your tablet.

Steps for Online Editing.

Limitations:

- Online Editor is a lite web browser-based editor, which does not provide all the available features which Word offers and you are accustomed to
- Print Preview is only in PDF format
- Creating tables and adding rows and columns are not as robust and not as user - friendly as Word
- For security reasons, editing sessions time out after 20 minutes if no activity is detected in the browser
- Copy and paste with complex tags from another Word document can result in errors due to Word format and the online editor's XML compatibility and conversion
- The online experience can be cumbersome if you are performing complex edits and have a slow internet connection

Steps for Setting Preference for Default Editor

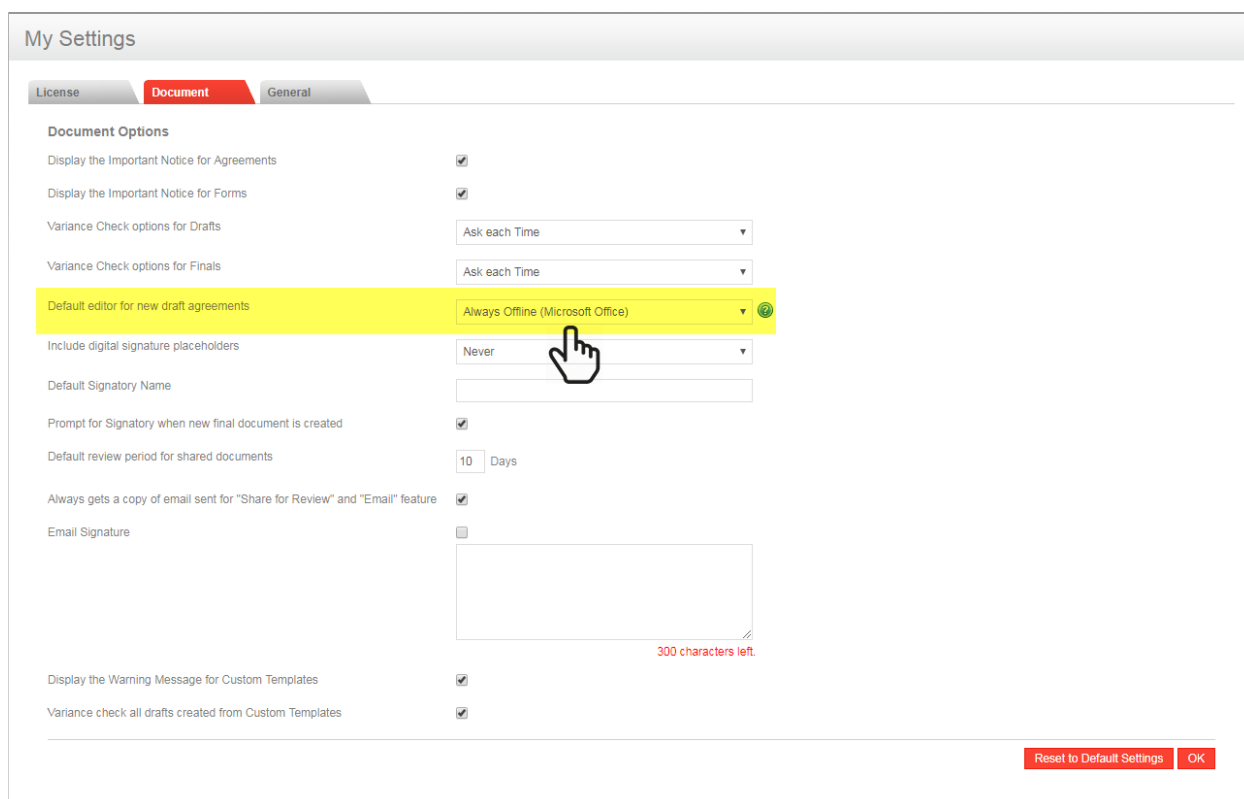
Step 1 – From My Settings

a. Select **Document** tab

From the **Document** tab, click on the drop-down of the Default editor for new draft agreements settings and select your default editor:

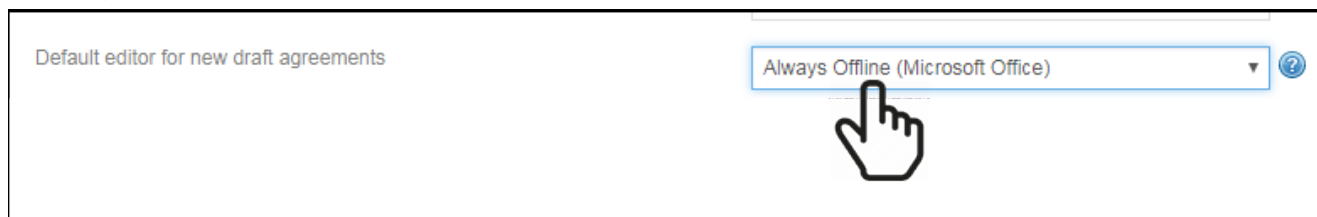
- **Always Online**
- **Always Offline (Microsoft Office)**

Note: the default setting is **Always Online**.



AIA Contract Documents

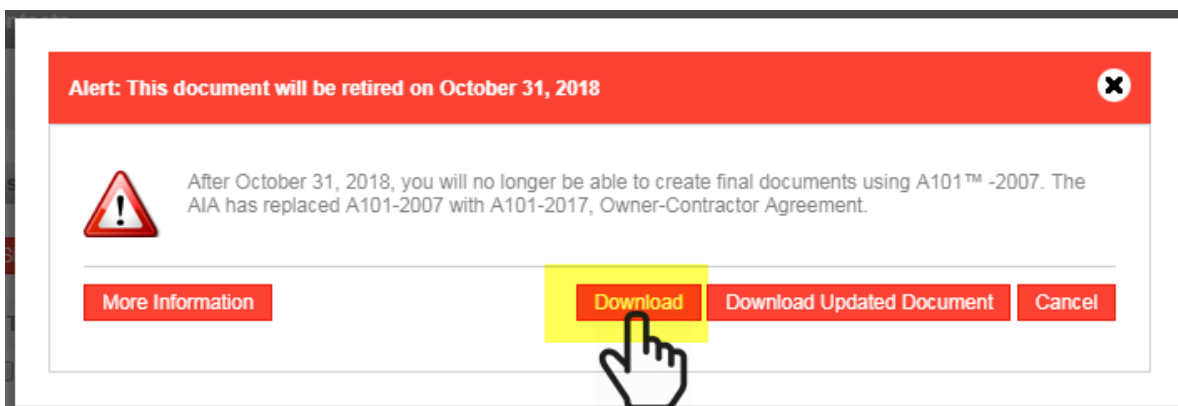
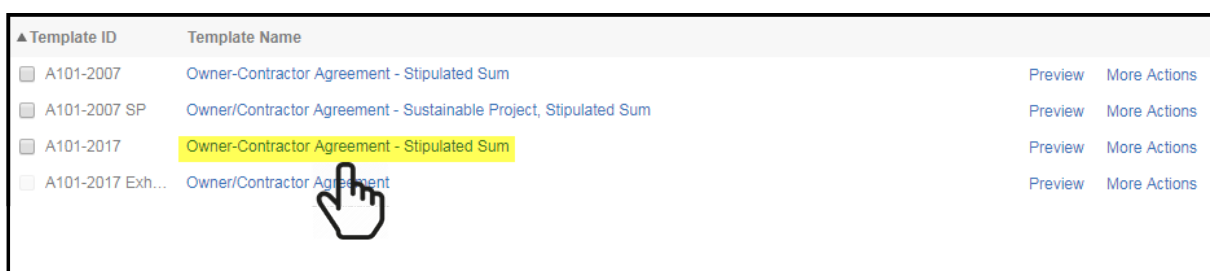
When Offline is selected:



Step 1 – Creating a document from the Template Library

a. Creating a document from the Template Library

At the top of the menu, click on **Template Library** and then browse to the standard template you wish to use. The option available is always **Download**.

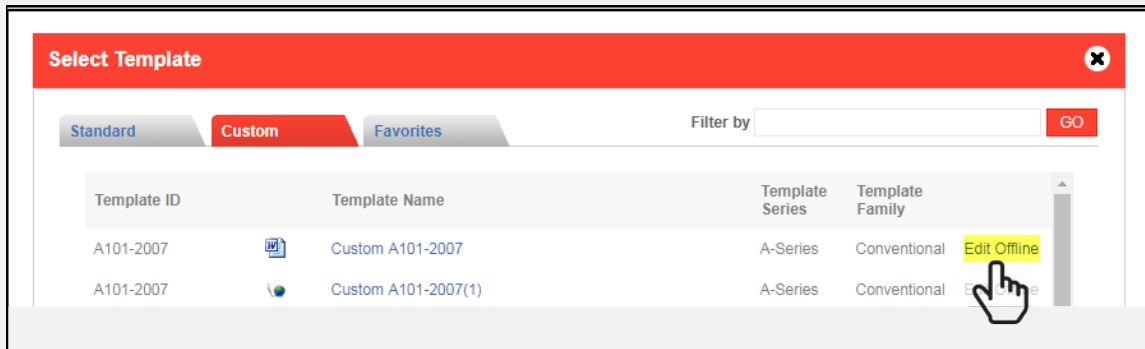


b. Creating a document from the Project

From the **Projects** tab, select the project. Click **Create Document**. Select the template you wish to use. The option available is always **Download**.

Note:

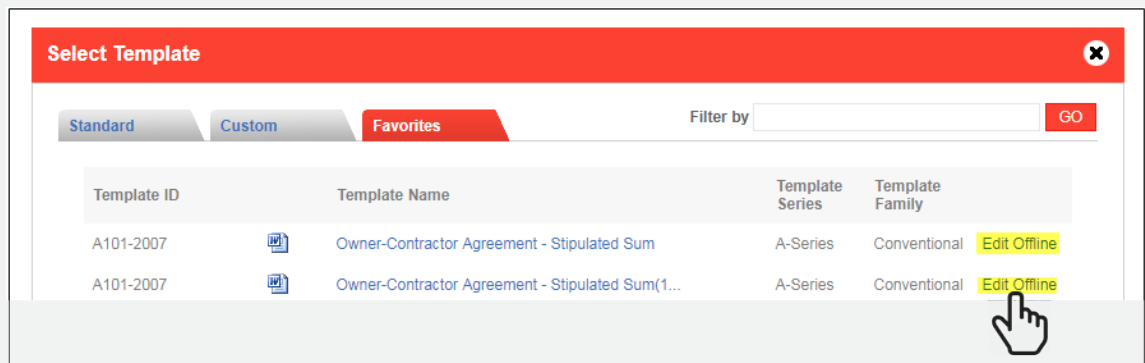
This **Always Offline (Microsoft Word)** option applies to only standard templates. For templates under **Custom** tab or **Favorites** tab, if downloadable the **Edit Offline** option is visible and not grayed out.



Select Template

Standard Custom Favorites Filter by GO

Template ID	Template Name	Template Series	Template Family	
A101-2007	Custom A101-2007	A-Series	Conventional	Edit Offline
A101-2007	Custom A101-2007(1)	A-Series	Conventional	Edit Offline



Select Template

Standard Custom Favorites Filter by GO

Template ID	Template Name	Template Series	Template Family	
A101-2007	Owner-Contractor Agreement - Stipulated Sum	A-Series	Conventional	Edit Offline
A101-2007	Owner-Contractor Agreement - Stipulated Sum(1...	A-Series	Conventional	Edit Offline

AIA Contract Documents

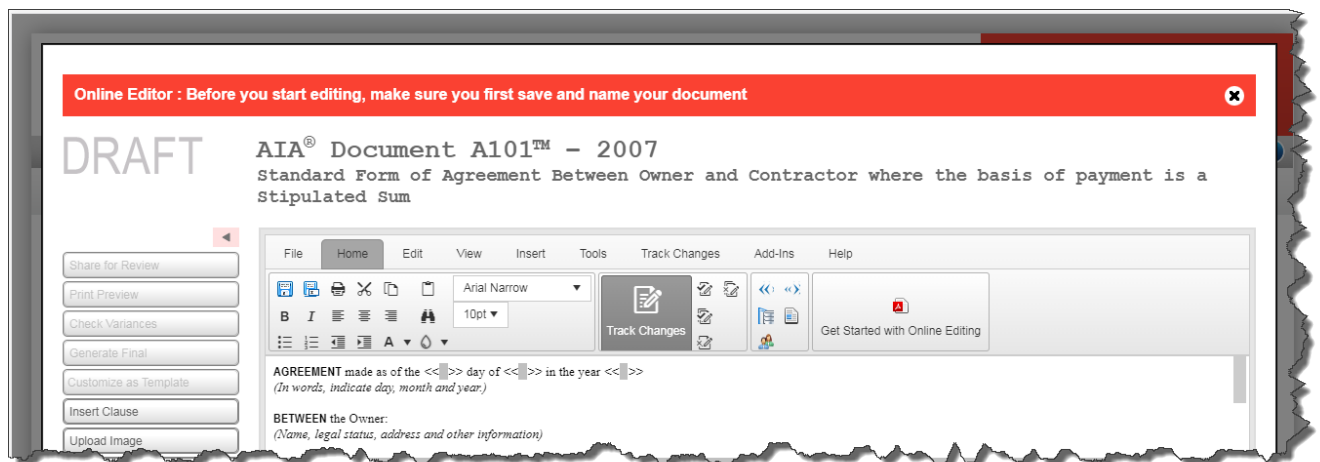
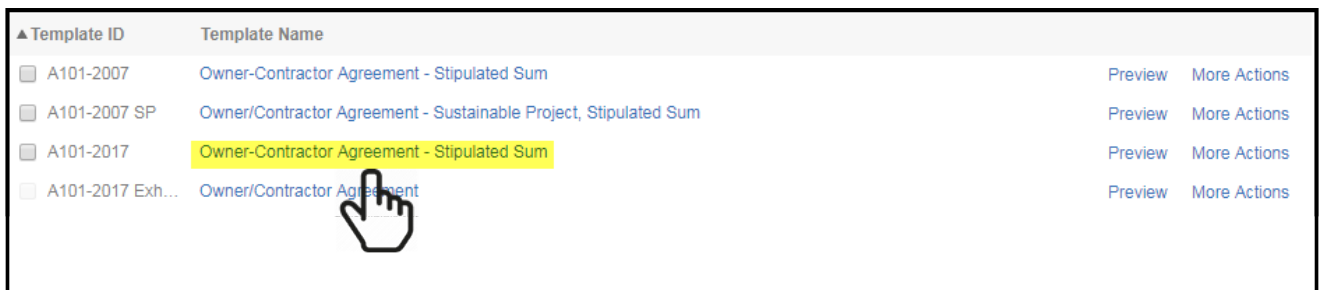
When Online is selected:



Step 1 – Creating a document from the Template Library

a. Creating a document from the Template Library

At the top of the menu, click on **Template Library** and then browse for the standard template you wish to use. The standard template will always open online using the Online Editor.



a. Creating a document from the Project

From the **Projects** tab, select the project. Click **Create Document**. Select the template you wish to use. The standard template will always open online using the Online Editor.

Note:

This **Always Online** option applies to only standard templates.

If the custom templates under **Custom** tab or **Favorites** tab can be edited online, the online symbol (🌐) is visible next to the template.

For custom templates under **Custom** tab or **Favorites** tab, if downloadable the **Edit Offline** option is visible and not grayed out and the Word symbol (📄) is also visible next to the template.

Select Template

Standard Custom Favorites Filter by GO

Template ID	Template Name	Template Series	Template Family	
A101-2007	Custom A101-2007	A-Series	Conventional	Edit Offline
A101-2007	Custom A101-2007(1)	A-Series	Conventional	Edit Offline

Edit Online **Edit Offline**

Select Template

Standard Custom Favorites Filter by GO

Template ID	Template Name	Template Series	Template Family	
A101-2007	Owner-Contractor Agreement - Stipulated Sum	A-Series	Conventional	Edit Offline
A101-2007	Owner-Contractor Agreement - Stipulated Sum(1...	A-Series	Conventional	Edit Offline
A101-2007 SP	Owner/Contractor Agreement - Sustainable Proj...	A-Series	Conventional	Edit Offline

Edit Offline

Additional Resources

Training Tools – We provide training tools such as webinars, video tutorials, and beginners guides.

Knowledge Base – Our [Knowledge Base](#) is searchable and includes information to Getting Started and frequently asked questions on Document and Software.

Customer Support Site – Need help? Find out all the ways you can get AIA Contract Documents support.

Offline Editing – Steps for Offline Editing. [Watch video >](#)

Online Editing – Steps for Online Editing. [Watch video >](#)