

# Sorting and Filtering Documents and Contacts

In April 2019, the Projects tab was revised to provide improved performance, easy access to recent work, and additional tools for sorting and filtering your documents and contacts. This guide looks at the improved filtering, grouping and sorting features, and includes the following sections:

- **Accessing Project Documents**
- **Icons and Text Menus**
- **Filtering documents**
- **Filtering Contacts when creating a Project Team**
- **Filtering Contacts when creating a Distribution List**
- **Filtering Templates**
- **Grouping using drag and drop**
- **Sorting**
- **More Actions**
- **Additional Resources**

## Accessing Project Documents

Project documents are now displayed in a different page. From the Projects tab, clicking **View All Documents** takes you to the new **Project Documents** page.

**AIA Contract Documents**

My Settings | Contact Us | Log Out  
Company Settings

Home Projects Template Library Contacts Last Login: 03/12/2019 01:49 PM ET

Projects

Create New Project

Search Projects Go

Project Modified Date  
Find by project name

**The Brixton Collection at Clover Hill**

- Project 13th Feb
- B133-2019\_Doc Centric
- Project\_Feb15DocCent\_A1342019
- Test Project 20
- Doc Centric\_A1342019
- Form Dollar Symbol
- Project\_DocCentric\_Feb13
- A1342019\_DocCentric
- Test Project 3
- Test Project 7
- sadflasd
- Ryan Homes Constructions - Phase 1
- Project Azure
- First Project
- Unarchived Project
- Project\_Jan28\_Newbuild1
- Project\_Jan22
- Test Project 6
- ShreveWood Elementary School Project
- Test Project 6

**Project Details**

Delete Project Edit Project Data

Project Name: The Brixton Collection at Clover Hill Last Modified Date: 02/21/2019 03:31 PM  
Project List Name: The Brixton Collection at Clover Hill Construction Contract / IPD Date: Jan 03, 2019  
Detailed Description: The Van matre Construction Company was established in 1973 and is a general contractor offering construction services in terms of Site Analysis, Feasi... Owner-Architect or International Client- Consultant Agreement Date: Jan 31, 2019  
Project Location: 23387 Epperson SquareBrambleton, VA,20148 Type of Contract: C3333333  
Project Type: Corporate Offices Contract Cost Structure: Guaranteed Maximum Price  
Guaranteed Maximum Price: 7500000.00  
Project Numbers  
Architect: A666666 Contractor: Townhome Construction  
Owner: O444444

Project Team > Distribution List > Project Manual >

**Recent Documents**











Create Document Import File View all documents >

Document ID	Type	Document Name	Status	Last Modified On
A134Eshb6A-2019		A134Eshb6A-2019 - Working Draft - 001[0091]	In Collaboration	3/11/2019, 10:43:49 PM
A134Eshb6A-2019		A134Eshb6A-2019 - Working Draft - 001_EO_imp_OLE	Draft	3/11/2019, 10:30:56 PM
A134Eshb6A-2019		A134Eshb6A-2019 - Final - 001_DD(1)	Finalized	3/11/2019, 10:20:04 PM

**Project Documents:** List of documents which belong to a specific project, which is highlighted on the left pane.


## About Icons and Context Menus

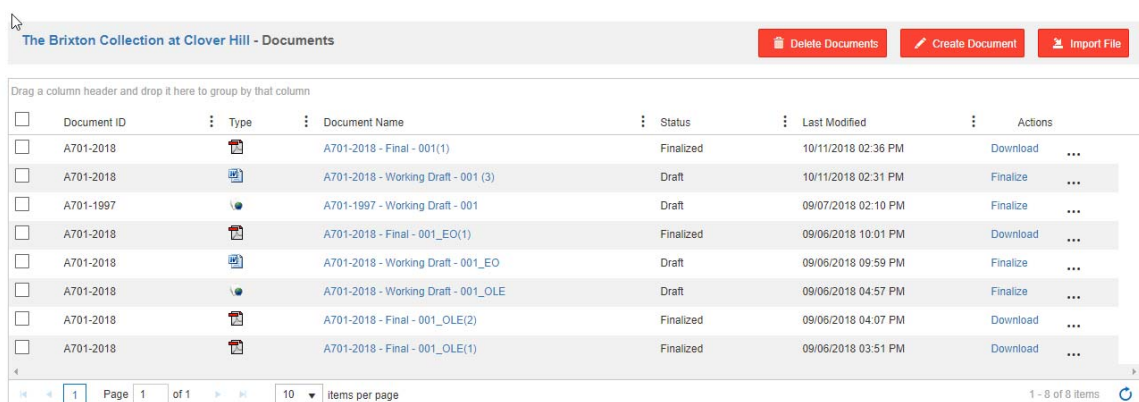
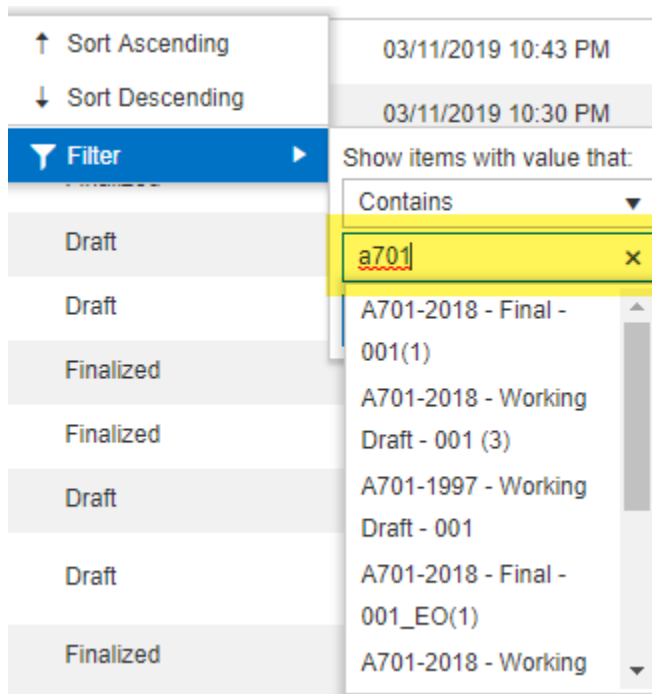
Below are the icons and context menus that are available for use within the Project Documents, Add to Distribution List, and Add to Project Team page.

Icon	Name	Meaning and Function
	<b>More Options</b>	Provides access options for sorting and filtering columns (sort ascending / descending, filter by text string)
	<b>More Actions</b>	Provides access to documents options such as rename, copy, print, email a document.
	<b>Collapse</b>	When grouping documents, this option can be used to collapse the group.
	<b>Expand</b>	When grouping documents, this option can be used to expand the group.
	<b>Checkbox Selection</b>	Mark for next action such as select for delete.
	<b>Drag and Drop</b>	Drag and Drop function is used to drop the column header to the “Drag and Drop” area to group the view of the documents by the column header such as Document ID.
 Download	<b>Download</b>	Downloads a file to your local desktop.
 Move	<b>Move</b>	This can be used to move a document file to another project.
 Check Variances	<b>Check Variances</b>	Check variances is used to check your changes against the document template.
 Import File	<b>Import File</b>	Import File is used to import offline documents from your desktop to store online. Other functions can be done afterward such as check variances.

## Filtering Documents


- **Example - Filtering Documents by Name**

Select a project and click View All Documents. Right click on **More Options** (  ) at the top of the Document Name column and enter a value for filtering, e.g. “a701”.



Note – filtering by text also applies to the **Project Team** and **Distribution List**.


## Filtering Contacts - Project Team

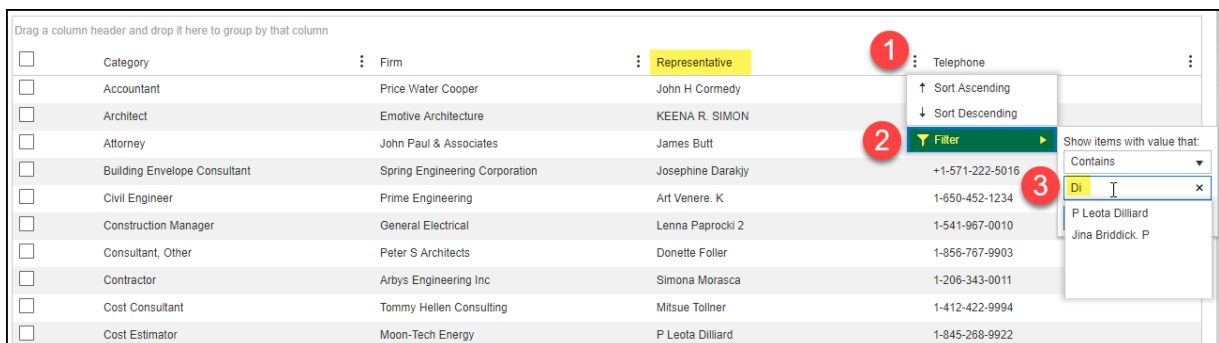
When creating a Project Team, you can use **More Options** (  ) to filter contacts by available columns (Category, Firm, or Representative).



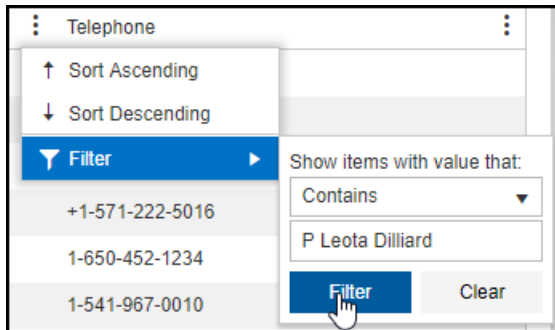
Remove Team Member <span>Add Team Member</span>				
Drag a column header and drop it here to group by that column				
<input type="checkbox"/>	Category	Firm	Representative	Telephone
<input type="checkbox"/>	Accountant	Price Water Cooper	John H Cormedy	(202) 756-1700
<input type="checkbox"/>	Architect	Emotive Architecture	KEENA R. SIMON	(202) 470-5570
<input type="checkbox"/>	Attorney	John Paul & Associates	James Butt	(703) 754-5010
<input type="checkbox"/>	Building Envelope Consultant	Spring Engineering Corporation	Josephine Darakjy	+1-571-222-5016
<input type="checkbox"/>	Civil Engineer	Prime Engineering	Art Venere, K	1-650-452-1234
<input type="checkbox"/>	Construction Manager	General Electrical	Lenna Paprocki 2	1-541-967-0010
<input type="checkbox"/>	Consultant, Other	Peter S Architects	Donette Foller	1-856-767-9903
<input type="checkbox"/>	Contractor	Arbys Engineering Inc	Simona Morasca	1-206-343-0011
<input type="checkbox"/>	Cost Consultant	Tommy Hellen Consulting	Mitsue Toliner	1-412-422-9994
<input type="checkbox"/>	Cost Estimator	Moon-Tech Energy	P Leota Dillard	1-845-268-9922

- **Example 1- Filtering Contacts by Representative column**

Select a project and click the Project Team tab. Click on **More Options** (  ) to the right of the **Representative** column > **Select Filter** > Under **Contains**, type a few letters of the name you want to filter by.




Select the name and click **Filter**.

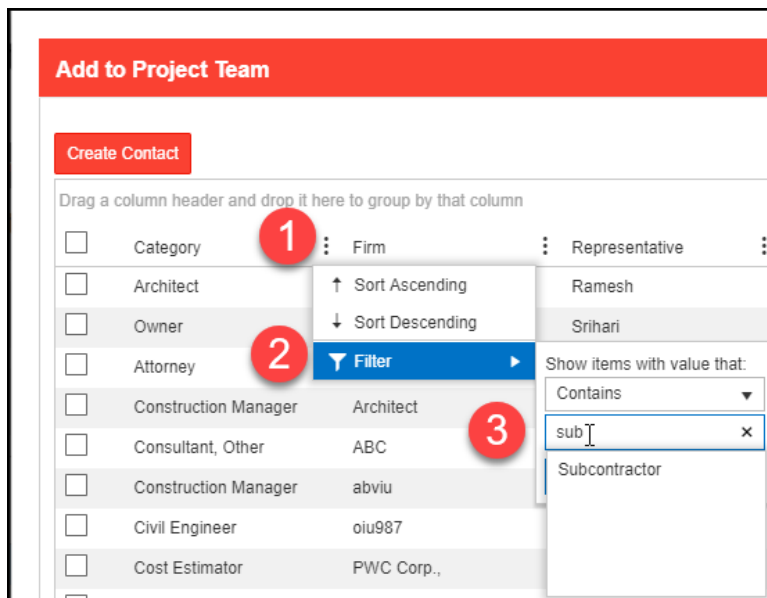


Now, the selection is available for you to view and add to the Project Team.

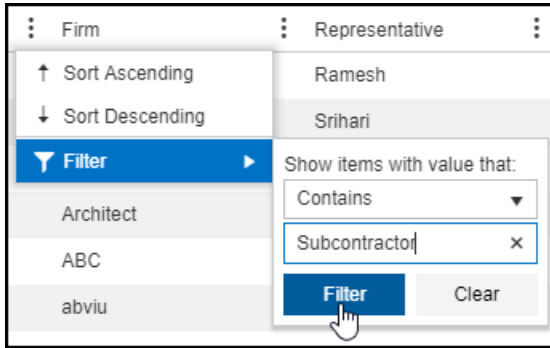


- **Example 2- Filtering Contacts by Category**

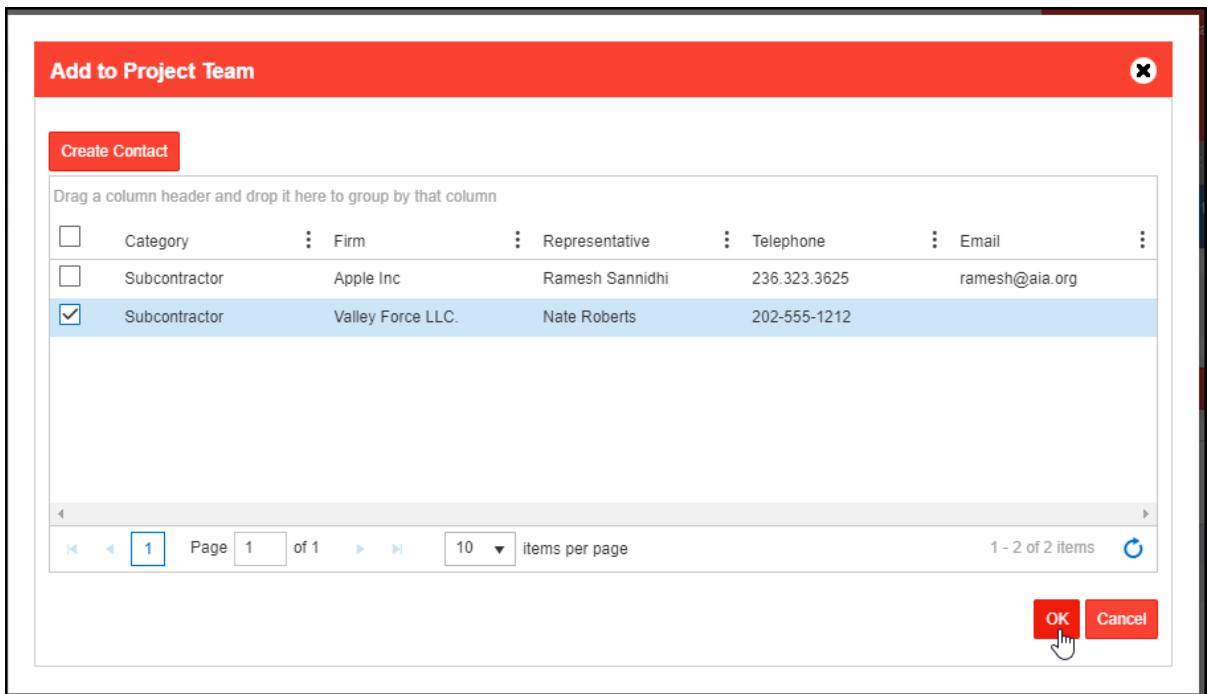
Click on **More Options** (  ) to the right of the **Category** column > **Select Filter** > Under **Contains**, type a few letters of the category you want to filter by.




# AIA Contract Documents

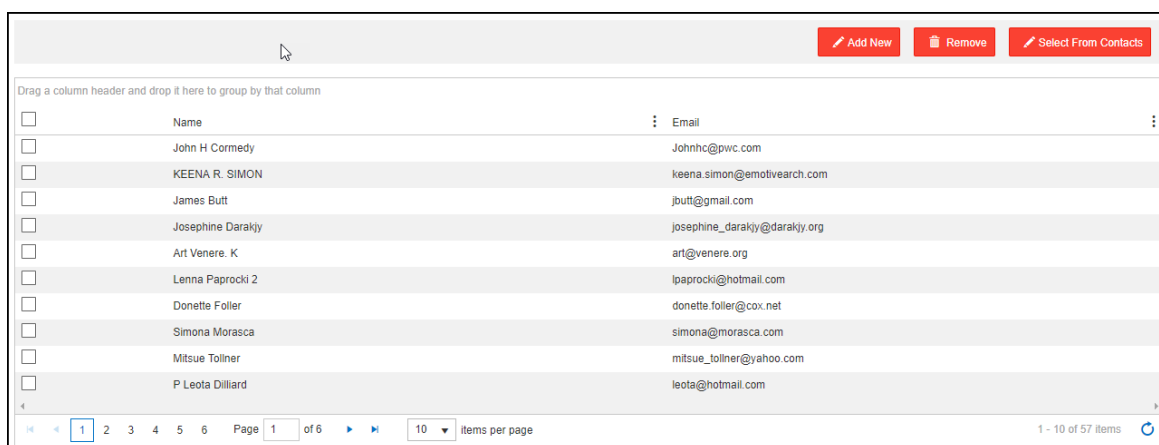


Select using the checkbox and click OK to add the selected subcontractor to your Project Team.




## Filtering Contacts – Adding Contacts to Distribution List

When creating a Distribution List, you can use **More Options** (  ) to filter the contact against the columns (Category, Firm, or Representative).



- **Example 1- Filtering Contacts by Representative column**

Click on **More Options** (  ) to the right of the **Representative** column > **Select Filter** > Under **Contains**, type a few letters of the name you want to filter by.



# AIA Contract Documents

### Add to Distribution List

\* Representative and email address information is required for adding contacts to a distribution list

Create Contact

Drag a column header and drop it here to group by that column

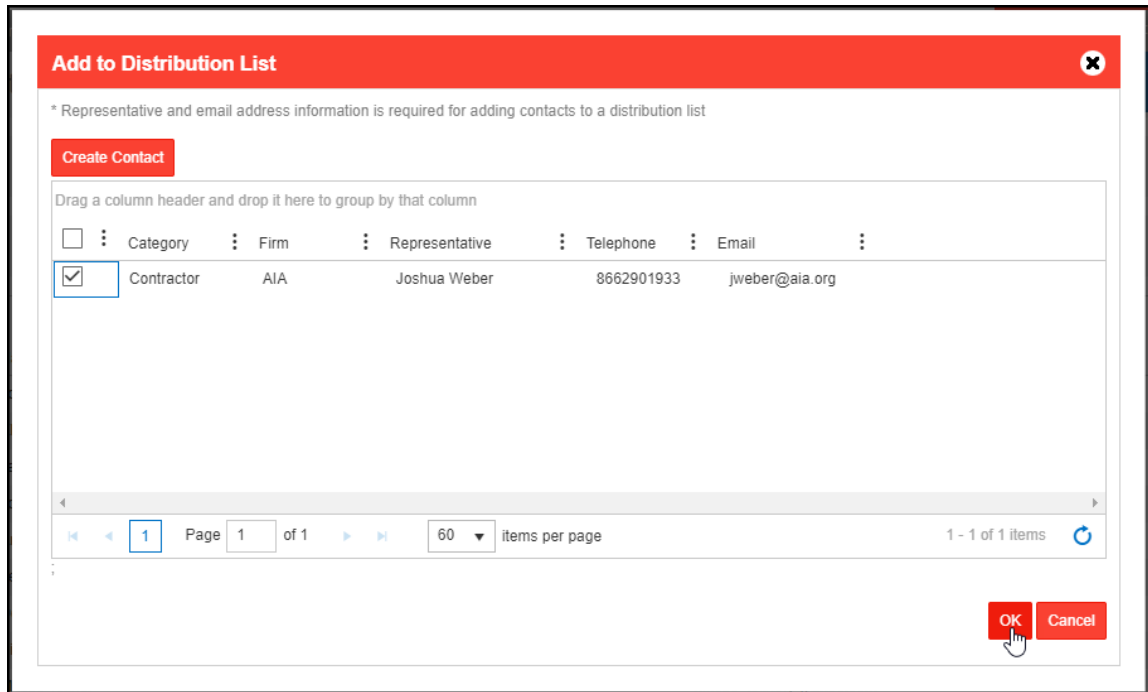
<input type="checkbox"/>	Category	Firm	Representative	Telephone	Email
<input type="checkbox"/>	Architect	Blackboard	Ramesh	↑ Sort Ascending	sh.sannidhi@...
<input type="checkbox"/>	Contractor	AIA	Joshua Weber	↓ Sort Descending	@aia.org
<input type="checkbox"/>	Owner	AppLabs	Srihari	Filter	
<input type="checkbox"/>	Attorney	GSS	Naresh.Khambam	456.456.4566	n.k@...
<input type="checkbox"/>	Construction Manager	Architect	Barrack Chase	+12 90876	bchas...
<input type="checkbox"/>	Consultant, Other	ABC	Nato Lee	+ 987 7654 (12345678)	njlee@...
<input type="checkbox"/>	Construction Manager	abviu	Christian Brooks	+ 987 7654 (12345678)	cfbroo...
<input type="checkbox"/>	Civil Engineer	oiu987	Milo Cherry	+ 987 7654 (12345678)	miло.cherry@oiu98...
<input type="checkbox"/>	Cost Estimator	PWC Corp.,	Jay Shall	234234(34)42-432-43.	j.shall@pwccorp.com
<input type="checkbox"/>	Architect	Blackboard	Joseph Morrison		jmorrison@blackbo...

Page 1 of 1 60 items per page 1 - 46 of 46 items

OK Cancel

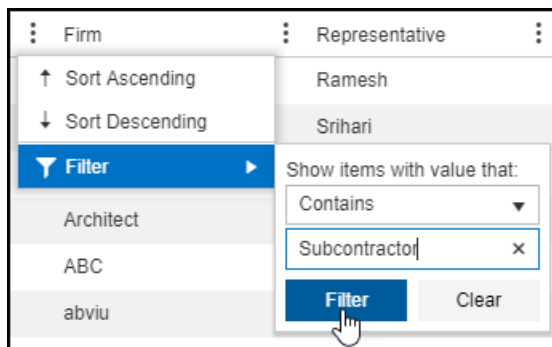
Select the name, and click **Filter**.

Now, the selection is available for you to view and add to the Distribution List.



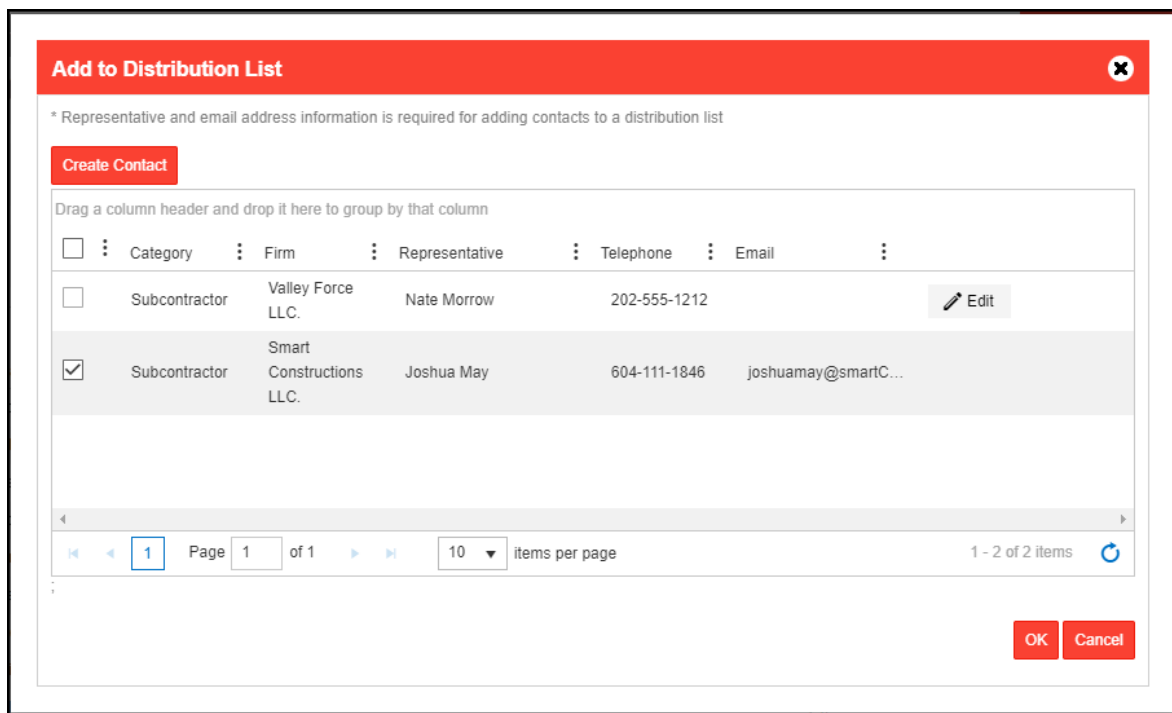
- **Example 2 - Filtering Contacts by Category**

Click on More Options ( **⋮** ) to the right of the **Category** column > **Select Filter** > Under **Contains**, type a few letters of the category you want to filter by.




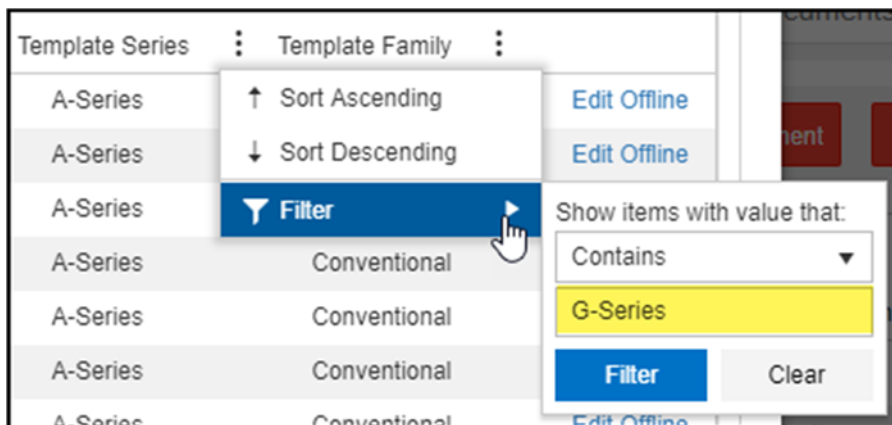
# AIA Contract Documents

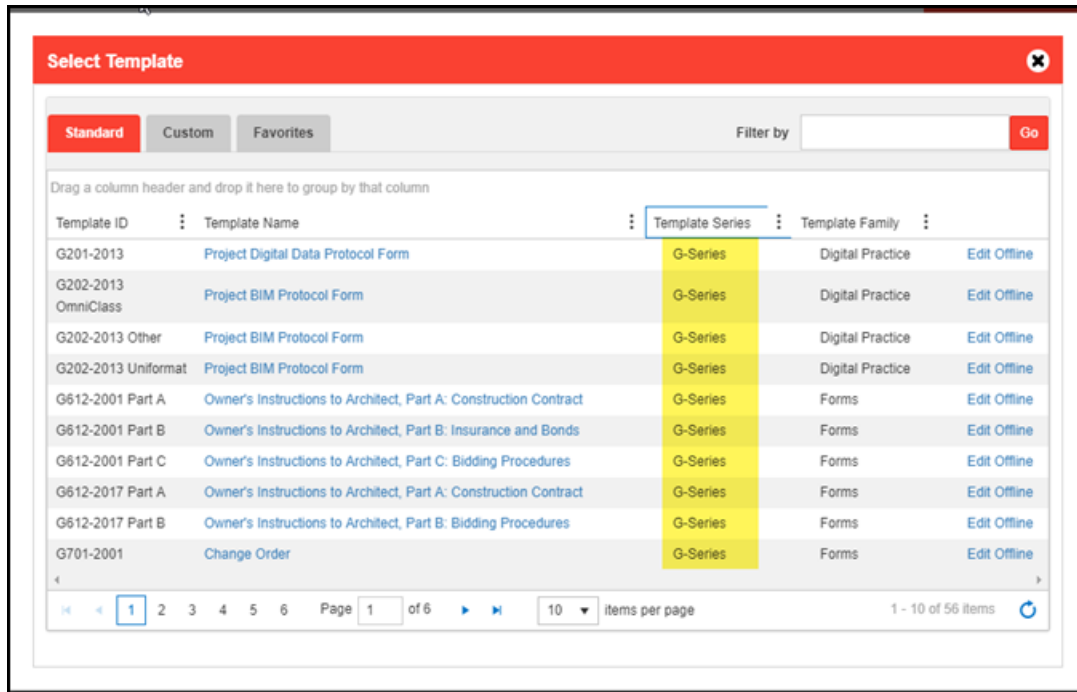
Select using the checkbox and click OK to add the selected subcontractor to your Distribution List.



## Filtering Templates

While creating new documents, you can use **More Options** (  ) to filter the templates by Template Name, Template Series, Template ID, and Template Family.



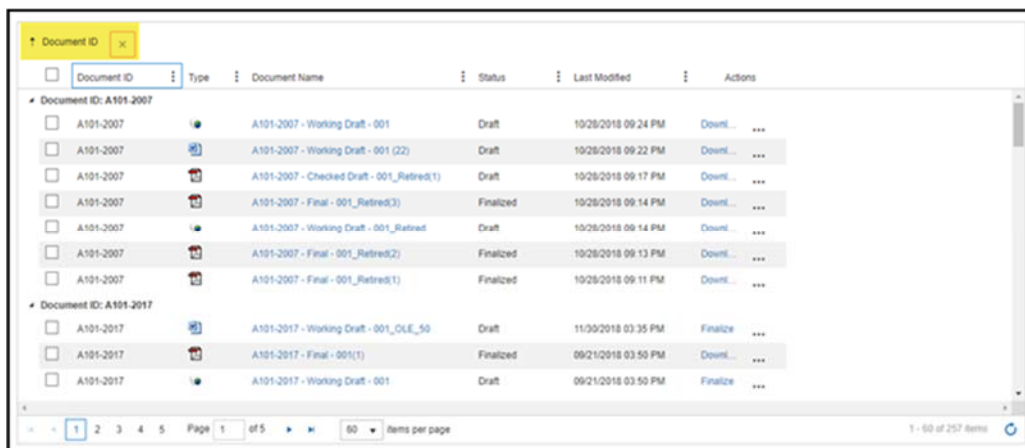


## Grouping by column header using Drag and Drop

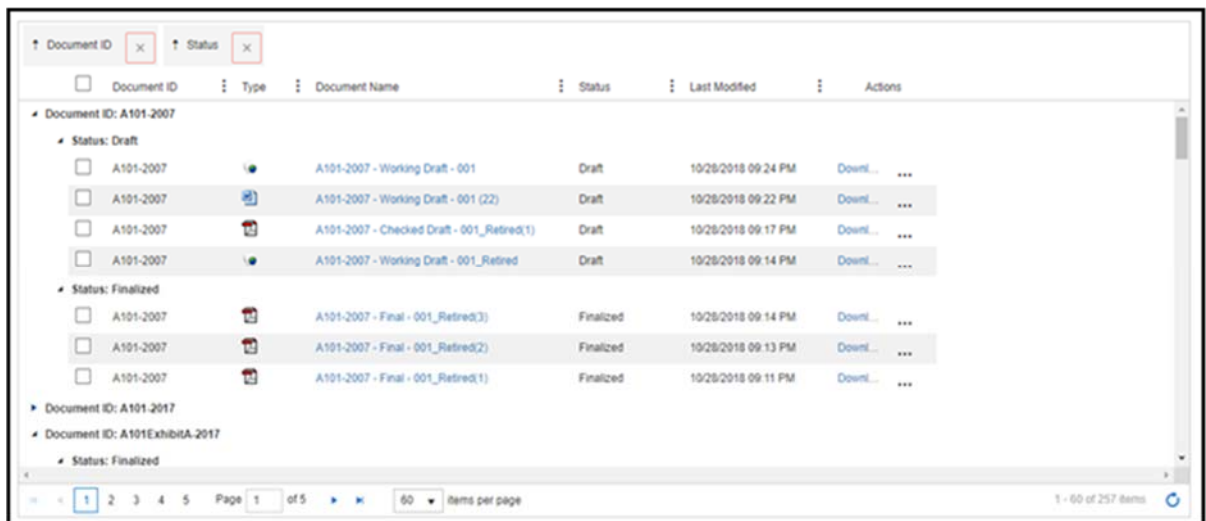
While viewing documents, a Project Team, or Distribution List, you can narrow down the list by dragging one or more column headers to the “Drag and Drop” area.

- **Example 1 – Group Documents by Document ID**

By dragging the Document ID to the “Drag and Drop” area, the view is now grouped by the Document ID.



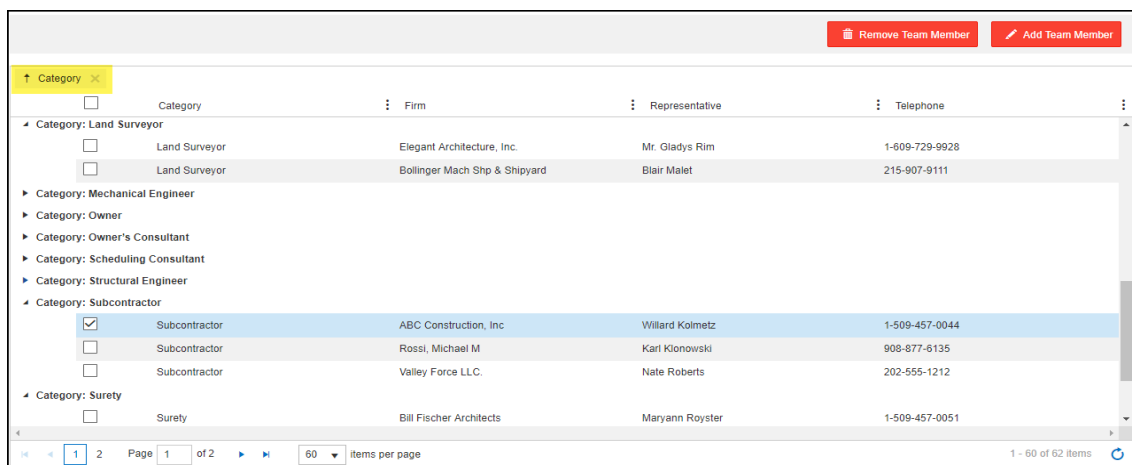
Additional grouping such as by Status can be done by dragging the Status column header label to the “Drag and Drop” area. Now, you can see within the Document ID such as A101-2007, which documents are in draft status and which documents are in the finalized status.



Note: Use ▶ to collapse the groups you don't want to view.

- **Example 2 – Group Project Team**

By dragging the Category and the Firm headers to the “Drag and Drop” area, the view is now grouped by the Category and the Firm headers.



Category	Firm	Representative	Telephone
Category: Mechanical Engineer			
Category: Owner			
Category: Owner's Consultant			
Category: Scheduling Consultant			
Category: Structural Engineer			
Category: Subcontractor			
Firm: ABC Construction, Inc.			
<input checked="" type="checkbox"/> Subcontractor	ABC Construction, Inc.	Willard Kolmetz	1-509-457-0044
Firm: Rossi, Michael M.			
<input type="checkbox"/> Subcontractor	Rossi, Michael M.	Karl Klonowski	908-877-6135
Firm: Valley Force LLC.			
<input type="checkbox"/> Subcontractor	Valley Force LLC.	Nate Roberts	202-555-1212
Category: Surety			
Firm: Bill Fischer Architects			

## • Example 3 – Group Distribution List



By dragging the Category and the Firm headers to the “Drag and Drop” area, the view is now grouped by the Category and the Firm headers.

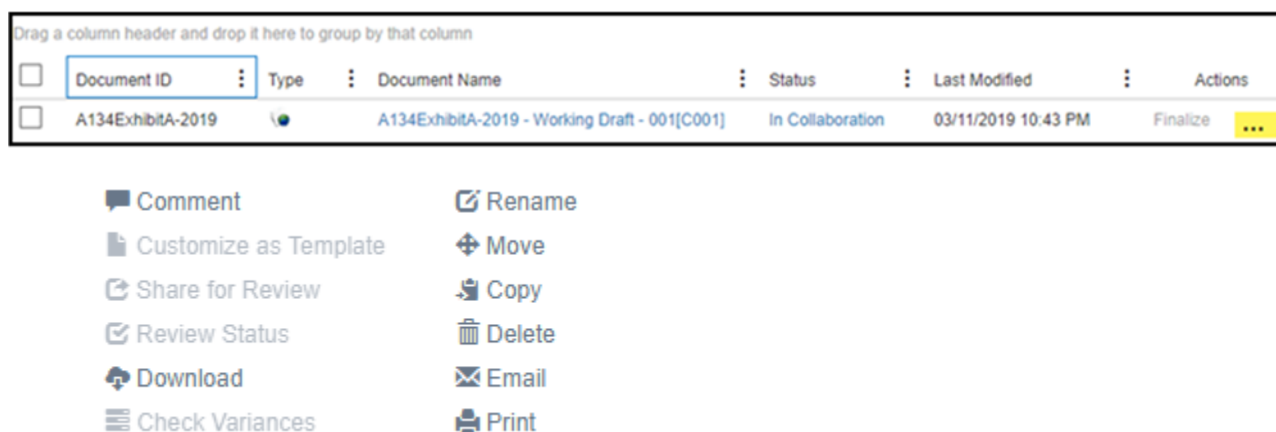
Category	Firm	Representative	Telephone	Email
Category: Accountant				
Firm: Apple Inc				
<input type="checkbox"/> Accountant	Apple Inc	Srihari Nagulavaram	563.321.3214	srihari@aia.org
Category: Architect				
Firm: Blackboard				
<input type="checkbox"/> Architect	Blackboard	Ramesh	6546546546	ramesh.sannidhi@...
<input checked="" type="checkbox"/> Architect	Blackboard	Joseph Morrison		jmorrison@blackb...
Firm: Cascade Realty Advisors Inc				
<input type="checkbox"/> Architect	Cascade Realty Advisors Inc	Francine Vocelka,	505-977-3911	francine_vocelka@...
Firm: Infosys.com				
<input type="checkbox"/> Architect	Infosys.com	Narayana Murthy	256.325.3258	murthy@infy.com
<input type="checkbox"/> Architect	Infosys.com			

## Sorting

Basic sorting of data by rows, in ascending or descending order, can be performed by clicking on one or more column headers.

## More Actions for documents

Additional options are available under **More Actions** (  ). Use **More Actions** (  ) to select from available options for each document such as rename, copy, download, email, Share for Review, etc.



## Additional Resources

**Training Tools** – We provide training tools such as webinars, video tutorials, and beginner’s 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 >](#)