# Editing Documents Offline

AIA Contract Documents Online Service offers two options for editing documents depending on your needs:

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

This quick guide provides steps on how to **edit your documents offline**.

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:

- To use Microsoft® Office Word and leverage full functionality;
- To work without an Internet connection;
- To make substantial and/or more complex edits such as adding or editing tables, inserting numbering and bullets, etc.

#### **Limitations:**

- Online Share For Review function unavailble
- Cannot create custom templates to re-use
- Cannot insert Contacts
- Insert clauses from the library unavailable

## **Online Editing**

#### Use online editing:

- For quick and simple changes such as making a correction;
- To insert a picture;
- To insert Contacts from a distribution list;
- If you don't have Microsoft® Office Word desktop software on your computer or device. **Steps for Online Editing**.

#### **Limitations:**

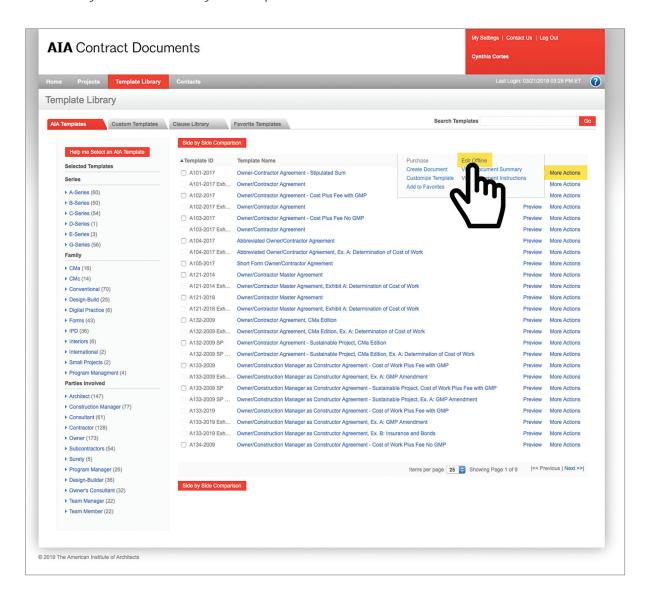
- As a lite web browser-based editor it does not provide all Microsoft®
   Office Word features
- · Print Preview is only available in PDF format
- Creating or modifying tables (adding rows and columns) is not as robust or user-friendly as with Microsoft® Office Word
- For security reasons, editing sessions time out after 20 minutes if no activity is detected in the browser
- Copy and paste with complex tags from another Microsoft® Office Word document can result in errors due to compatibility and conversion
- It can be cumbersome if you are performing complex edits with a slow internet connection

# Steps for Offline Editing

#### Step 1 - Download

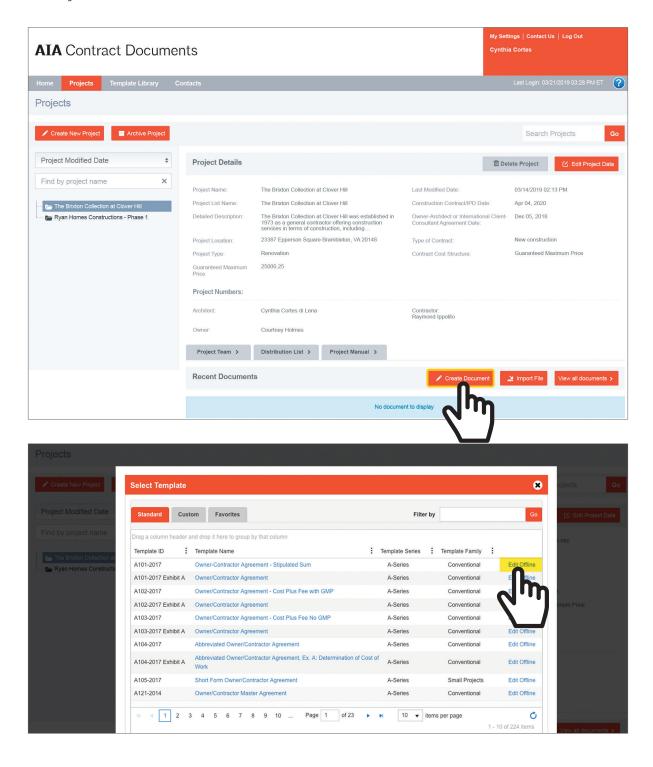
#### a. Creating a document from the Template Library

At the top of the menu, click on **Template Library** and then click on **More Actions** next to the document you would like to work on. Select **Edit Offline** as shown below and this will download your document to your computer.



#### b. Creating a document from Projects

From the Projects tab, click **on the project** you want to create the document from the left pane. Under cproject name> - Documents, click **Create Document**. From the **Select Template** pop-up window, a list of templates will be available for you to select. Next to the template which you want to create draft, click **Edit Offline**.



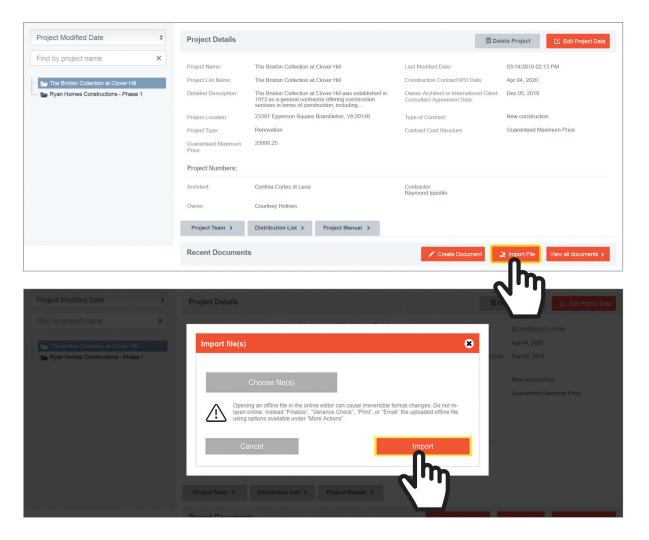
#### Step 2 - Edit

Open the downloaded document in Microsoft® Office Word to make your edits and save your document locally. Do not delete chevrons (<< >>) when working in draft documents. Chevrons will be removed automatically when generating checked draft (PDF format) and final documents.

**Note:** The project details will be copied to your document, if you create the document from the Project tab. The project details will not be copied to your document, if you create the document from the Template Library.

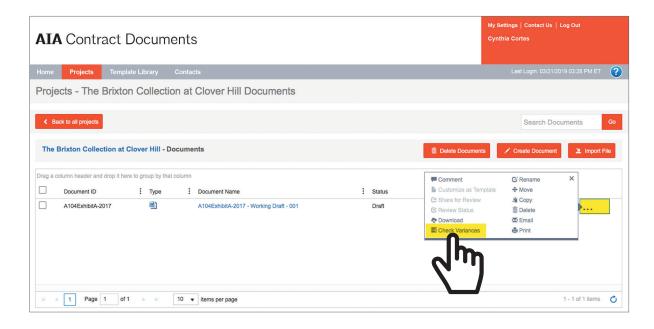
#### Step 3 - Upload

Log back in and click on **Projects** at the top of the menu. If you do not have an existing project, click on **Create New Project** to create a project first. Then upload your agreement document by clicking on **Import File**, click **Choose File** and find the location of your document. You may then click **OK** to start uploading as shown below.



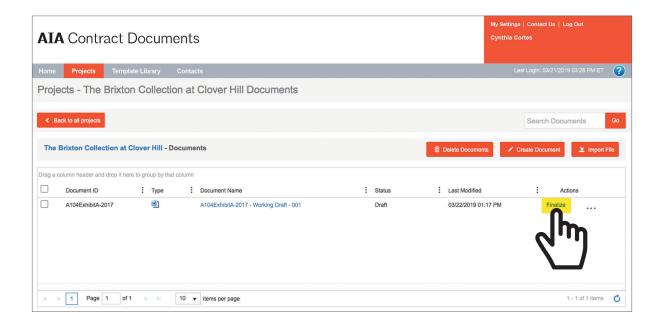
#### Step 4 - Variance Check

From More Actions next to the document you uploaded, click **Check Variances** from the expanded pane and this will generate your Variance Check document in a PDF file. This allows you to check changes prior to finalizing your document.



### Step 5 - Finalize

Click **Finalize** next to the document you uploaded and this will generate your completed document in a PDF file.



#### **Additional Resources**

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

**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 >

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