

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 unavailable
- 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.

The screenshot displays the AIA Contract Documents web application. The top navigation bar includes 'Home', 'Projects', 'Template Library' (highlighted), and 'Contacts'. A user profile for 'Cynthia Cortes' is visible in the top right. The 'Template Library' section has tabs for 'AIA Templates', 'Custom Templates', 'Clause Library', and 'Favorite Templates'. A search bar is present. On the left, there's a sidebar with 'Selected Templates' and a 'Family' list including categories like 'CMa', 'CMc', 'Conventional', 'Design-Build', 'Digital Practice', 'Forms', 'IPD', 'Interiors', 'International', 'Small Projects', 'Program Management', 'Parties Involved', 'Architect', 'Construction Manager', 'Consultant', 'Contractor', 'Owner', 'Subcontractors', 'Surety', 'Program Manager', 'Design-Build', 'Owner's Consultant', 'Team Manager', and 'Team Member'. The main area shows a table of templates with columns for 'Template ID', 'Template Name', and actions. A hand cursor points to the 'Edit Offline' button in the actions column for the first template. The table lists various AIA contract forms such as 'Owner-Contractor Agreement - Stipulated Sum', 'Owner/Contractor Agreement - Cost Plus Fee with GMP', etc. At the bottom, there's a pagination bar showing 'Items per page 25' and 'Showing Page 1 of 9'.

AIA Contract Documents

My Settings | Contact Us | Log Out

Cynthia Cortes

Home Projects **Template Library** Contacts

Last Login: 03/21/2019 03:28 PM ET

Template Library

AIA Templates Custom Templates Clause Library Favorite Templates

Search Templates Go

Help me Select an AIA Template

Selected Templates

Series

- A-Series (60)
- B-Series (50)
- C-Series (54)
- D-Series (1)
- E-Series (3)
- G-Series (56)

Family

- CMa (16)
- CMc (14)
- Conventional (70)
- Design-Build (25)
- Digital Practice (6)
- Forms (43)
- IPD (36)
- Interiors (6)
- International (2)
- Small Projects (2)
- Program Management (4)

Parties Involved

- Architect (147)
- Construction Manager (77)
- Consultant (61)
- Contractor (128)
- Owner (173)
- Subcontractors (54)
- Surety (5)
- Program Manager (26)
- Design-Build (36)
- Owner's Consultant (32)
- Team Manager (22)
- Team Member (22)

Side by Side Comparison

Template ID	Template Name	Purchase	Create Document	Customize Template	Add to Favorites	Edit Offline	Document Summary	Document Instructions	More Actions
<input type="checkbox"/> A101-2017	Owner-Contractor Agreement - Stipulated Sum								Preview More Actions
<input type="checkbox"/> A101-2017 Exh...	Owner/Contractor Agreement								Preview More Actions
<input type="checkbox"/> A102-2017	Owner/Contractor Agreement - Cost Plus Fee with GMP								Preview More Actions
<input type="checkbox"/> A102-2017 Exh...	Owner/Contractor Agreement								Preview More Actions
<input type="checkbox"/> A103-2017	Owner/Contractor Agreement - Cost Plus Fee No GMP								Preview More Actions
<input type="checkbox"/> A103-2017 Exh...	Owner/Contractor Agreement								Preview More Actions
<input type="checkbox"/> A104-2017	Abbreviated Owner/Contractor Agreement								Preview More Actions
<input type="checkbox"/> A104-2017 Exh...	Abbreviated Owner/Contractor Agreement, Ex. A: Determination of Cost of Work								Preview More Actions
<input type="checkbox"/> A105-2017	Short Form Owner/Contractor Agreement								Preview More Actions
<input type="checkbox"/> A121-2014	Owner/Contractor Master Agreement								Preview More Actions
<input type="checkbox"/> A121-2014 Exh...	Owner/Contractor Master Agreement, Exhibit A: Determination of Cost of Work								Preview More Actions
<input type="checkbox"/> A121-2018	Owner/Contractor Master Agreement								Preview More Actions
<input type="checkbox"/> A121-2018 Exh...	Owner/Contractor Master Agreement, Exhibit A: Determination of Cost of Work								Preview More Actions
<input type="checkbox"/> A132-2009	Owner/Contractor Agreement, CMa Edition								Preview More Actions
<input type="checkbox"/> A132-2009 Exh...	Owner/Contractor Agreement, CMa Edition, Ex. A: Determination of Cost of Work								Preview More Actions
<input type="checkbox"/> A132-2009 SP	Owner/Contractor Agreement - Sustainable Project, CMa Edition								Preview More Actions
<input type="checkbox"/> A132-2009 SP ...	Owner/Contractor Agreement - Sustainable Project, CMa Edition, Ex. A: Determination of Cost of Work								Preview More Actions
<input type="checkbox"/> A133-2009	Owner/Construction Manager as Constructor Agreement - Cost of Work Plus Fee with GMP								Preview More Actions
<input type="checkbox"/> A133-2009 Exh...	Owner/Construction Manager as Constructor Agreement, Ex. A: GMP Amendment								Preview More Actions
<input type="checkbox"/> A133-2009 SP	Owner/Construction Manager as Constructor Agreement - Sustainable Project, Cost of Work Plus Fee with GMP								Preview More Actions
<input type="checkbox"/> A133-2009 SP ...	Owner/Construction Manager as Constructor Agreement - Sustainable Project, Ex. A: GMP Amendment								Preview More Actions
<input type="checkbox"/> A133-2019	Owner/Construction Manager as Constructor Agreement - Cost of Work Plus Fee with GMP								Preview More Actions
<input type="checkbox"/> A133-2019 Exh...	Owner/Construction Manager as Constructor Agreement, Ex. A: GMP Amendment								Preview More Actions
<input type="checkbox"/> A133-2019 Exh...	Owner/Construction Manager as Constructor Agreement, Ex. B: Insurance and Bonds								Preview More Actions
<input type="checkbox"/> A134-2009	Owner/Construction Manager as Constructor Agreement - Cost of Work Plus Fee No GMP								Preview More Actions

Items per page 25 Showing Page 1 of 9 << Previous | Next >>

Side by Side Comparison

© 2019 The American Institute of Architects

AIA Contract Documents

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 <project 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**.

AIA Contract Documents

My Settings | Contact Us | Log Out
Cynthia Cortes

Home | **Projects** | Template Library | Contacts

Last Login: 03/21/2019 03:28 PM ET

Projects

Create New Project | Archive Project

Search Projects Go

Project Modified Date

Find by project name

The Brixton Collection at Clover Hill
Ryan Homes Constructions - Phase 1

Project Details

Delete Project | Edit Project Data

Project Name: The Brixton Collection at Clover Hill
Project List Name: The Brixton Collection at Clover Hill
Detailed Description: The Brixton Collection at Clover Hill was established in 1973 as a general contractor offering construction services in terms of construction, including...
Project Location: 23387 Epperson Square Brambleton, VA 20148
Project Type: Renovation
Guaranteed Maximum Price: 25000.25
Project Numbers:
Architect: Cynthia Cortes di Lena
Owner: Courtney Holmes
Contractor: Raymond Ippolito

Last Modified Date: 03/14/2019 02:13 PM
Construction Contract/IPD Date: Apr 04, 2020
Owner-Architect or International Client-Consultant Agreement Date: Dec 05, 2018
Type of Contract: New construction
Contract Cost Structure: Guaranteed Maximum Price

Project Team > | Distribution List > | Project Manual >

Recent Documents

Create Document | Import File | View all documents >

No document to display

Select Template

Standard | Custom | Favorites

Filter by Go

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

Template ID	Template Name	Template Series	Template Family	
A101-2017	Owner/Contractor Agreement - Stipulated Sum	A-Series	Conventional	Edit Offline
A101-2017 Exhibit A	Owner/Contractor Agreement	A-Series	Conventional	Edit Offline
A102-2017	Owner/Contractor Agreement - Cost Plus Fee with GMP	A-Series	Conventional	Edit Offline
A102-2017 Exhibit A	Owner/Contractor Agreement	A-Series	Conventional	Edit Offline
A103-2017	Owner/Contractor Agreement - Cost Plus Fee No GMP	A-Series	Conventional	Edit Offline
A103-2017 Exhibit A	Owner/Contractor Agreement	A-Series	Conventional	Edit Offline
A104-2017	Abbreviated Owner/Contractor Agreement	A-Series	Conventional	Edit Offline
A104-2017 Exhibit A	Abbreviated Owner/Contractor Agreement, Ex. A: Determination of Cost of Work	A-Series	Conventional	Edit Offline
A105-2017	Short Form Owner/Contractor Agreement	A-Series	Small Projects	Edit Offline
A121-2014	Owner/Contractor Master Agreement	A-Series	Conventional	Edit Offline

1 2 3 4 5 6 7 8 9 10 ... Page 1 of 23 10 items per page 1 - 10 of 224 items

AIA Contract Documents

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.

The screenshot shows the 'Project Details' page. On the left, there's a sidebar with a search bar and a list of projects. The main area displays project details for 'The Brixton Collection at Clover Hill'. At the bottom, there's a 'Recent Documents' section with three buttons: 'Create Document', 'Import File' (highlighted with a hand cursor), and 'View all documents >'. The project details include fields for Project Name, Project List Name, Detailed Description, Project Location, Project Type, Guaranteed Maximum Price, Project Numbers, Architect, Owner, Last Modified Date, Construction Contract/CPD Date, Owner-Architect or International Client-Consultant Agreement Date, Type of Contract, and Contract Cost Structure.

The screenshot shows the 'Import file(s)' dialog box. It has a title bar with a close button. Inside, there's a 'Choose file(s)' button, a warning icon with a message: 'Opening an offline file in the online editor can cause irreversible format changes. Do not re-open online. Instead "Finalize", "Variance Check", "Print", or "Email" the uploaded offline file using options available under "More Actions".', and two buttons: 'Cancel' and 'Import' (highlighted with a hand cursor).

AIA Contract Documents

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.

The screenshot shows the AIA Contract Documents web application. The top navigation bar includes 'Home', 'Projects', 'Template Library', and 'Contacts'. The user is logged in as Cynthia Cortes. The main content area is titled 'Projects - The Brixton Collection at Clover Hill Documents'. Below this, there is a search bar and a list of documents. The document 'A104ExhibitA-2017' is shown in a 'Draft' status. A context menu is open next to the document, displaying various actions. The 'Check Variances' option is highlighted with a yellow box and a hand cursor pointing to it.

Document ID	Type	Document Name	Status
A104ExhibitA-2017		A104ExhibitA-2017 - Working Draft - 001	Draft

- Comment
- Customize as Template
- Share for Review
- Review Status
- Download
- Check Variances
- Rename
- Move
- Copy
- Delete
- Email
- Print

Step 5 – Finalize

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

The screenshot shows the AIA Contract Documents web application. The top navigation bar includes 'Home', 'Projects', 'Template Library', and 'Contacts'. The user is logged in as Cynthia Cortes. The main content area is titled 'Projects - The Brixton Collection at Clover Hill Documents'. Below this, there is a search bar and a list of documents. The document 'A104ExhibitA-2017' is shown in a 'Draft' status. A context menu is open next to the document, displaying various actions. The 'Finalize' option is highlighted with a yellow box and a hand cursor pointing to it.

Document ID	Type	Document Name	Status	Last Modified	Actions
A104ExhibitA-2017		A104ExhibitA-2017 - Working Draft - 001	Draft	03/22/2019 01:17 PM	Finalize

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 >](#)

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