

Editing Documents Online

AIA Contract Documents offers different options for editing documents depending on your needs:

- Offline Editing using Microsoft® Office Word
- Online Editing using AIA Contract Documents Online Editor

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

Important! Use online editing for basic edits. Offline editing is recommended when large or complex edits are expected. Additional details regarding editing documents offline vs online are included below.

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.

Limitations:

- The Online Editor is a lite web browser-based editor, which does not provide all the features which Word offers and you might be custom 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

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

Steps for Offline Editing.

Limitations:

- Cannot utilize the online Share For Review function
- Cannot create custom templates to re-use
- Cannot insert Contacts
- Cannot insert clauses from the library

Before you start

Check your current editor settings. Make sure that your default editor for new draft agreements is **set to Online**. To confirm your settings:

1. Click on **My Settings** located at the top of your screen
2. On the **Document tab**, find the setting for “Default editor for new draft agreements”
3. Set it to “**Always Online**” if it isn’t already
4. Click **OK** to save your change

You are now ready to proceed with online editing.

Steps for Online Editing

Step 1 – Creating Documents

a. Create a document from a Project

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. **Click the Template Name** of the one you want to use to create the draft.

The screenshot displays the AIA Contract Documents web application interface. The top navigation bar includes 'Home', 'Projects', 'Template Library', and 'Contacts'. The 'Projects' tab is active, showing a search bar and a list of projects. The 'Pochis House' project is selected, and the 'Documents' section is visible. A 'Create Document' button is highlighted with a hand cursor. Below this, a 'Select Template' pop-up window is shown, displaying a list of templates. The 'Standard' tab is selected, and the 'Owner-Contractor Agreement - Stipulated Sum' template is highlighted with a hand cursor.

| Document ID | Type | Document Name | Status | Last Modified | Actions |
|-------------|------|--|--------|---------------------|-----------------------|
| A101-2017 | | A101-2017 - Working Draft - 001-draft | Draft | 05/16/2017 12:06 PM | More Actions |
| A101-2017 | | A101-2017 - Working Draft - 001-draft | Draft | 05/16/2017 12:06 PM | More Actions |
| A101-2017 | | A101-2017 - Working Draft - 001-draft | Draft | 05/16/2017 11:54 AM | Finalize More Actions |
| A101-2017 | | A101-2017 - Checked Draft - 001-draft(1) | Draft | 05/16/2017 11:48 AM | Finalize More Actions |
| A101-2017 | | A101-2017 - Working Draft - 001-draft | Draft | 05/16/2017 11:41 AM | Finalize More Actions |
| A101-2017 | | A101-2017 - Working Draft - 001-draft | Draft | 05/16/2017 11:41 AM | Finalize More Actions |

| Template ID | Template Name | Template Series | Template Family | Actions |
|---------------------|--|-----------------|-----------------|--------------|
| A101-2007 | Owner-Contractor Agreement - Stipulated Sum | A-Series | Conventional | Edit Offline |
| A101-2007 SP | Owner/Contractor Agreement - Sustainable Proj... | A-Series | Conventional | Edit Offline |
| A101-2017 | Owner-Contractor Agreement - Stipulated Sum | A-Series | Conventional | Edit Offline |
| A101-2017 Exhibit A | Owner/Contractor Agreement | A-Series | Conventional | Edit Offline |
| A102-2007 | Owner/Contractor Agreement - Cost Plus Fee w/... | A-Series | Conventional | Edit Offline |
| A102-2017 | Owner/Contractor Agreement - Cost Plus Fee w/... | A-Series | Conventional | Edit Offline |
| A102-2017 Exhibit A | Owner/Contractor Agreement | A-Series | Conventional | Edit Offline |
| A103-2007 | Owner/Contractor Agreement - Cost Plus Fee No... | A-Series | Conventional | Edit Offline |
| A103-2017 | Owner/Contractor Agreement - Cost Plus Fee No... | A-Series | Conventional | Edit Offline |
| A103-2017 Exhibit A | Owner/Contractor Agreement | A-Series | Conventional | Edit Offline |

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

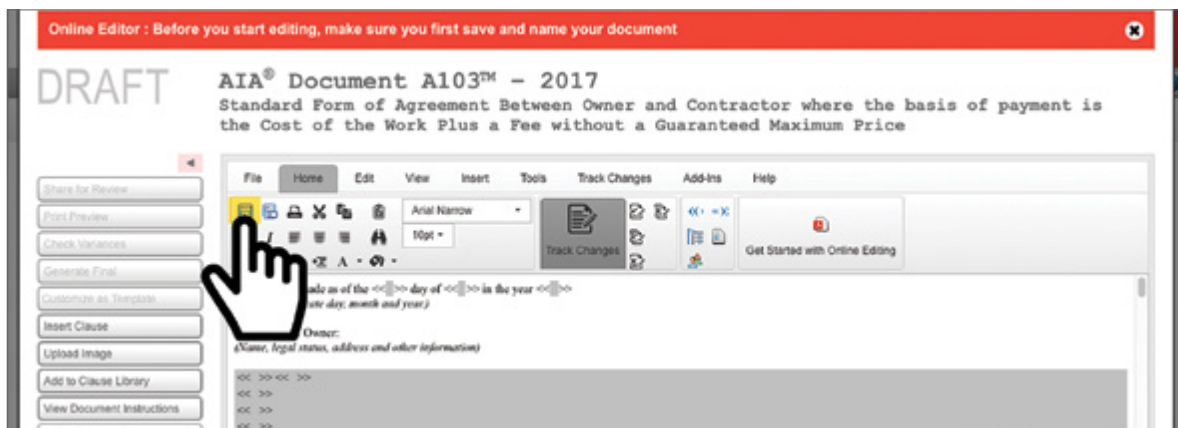
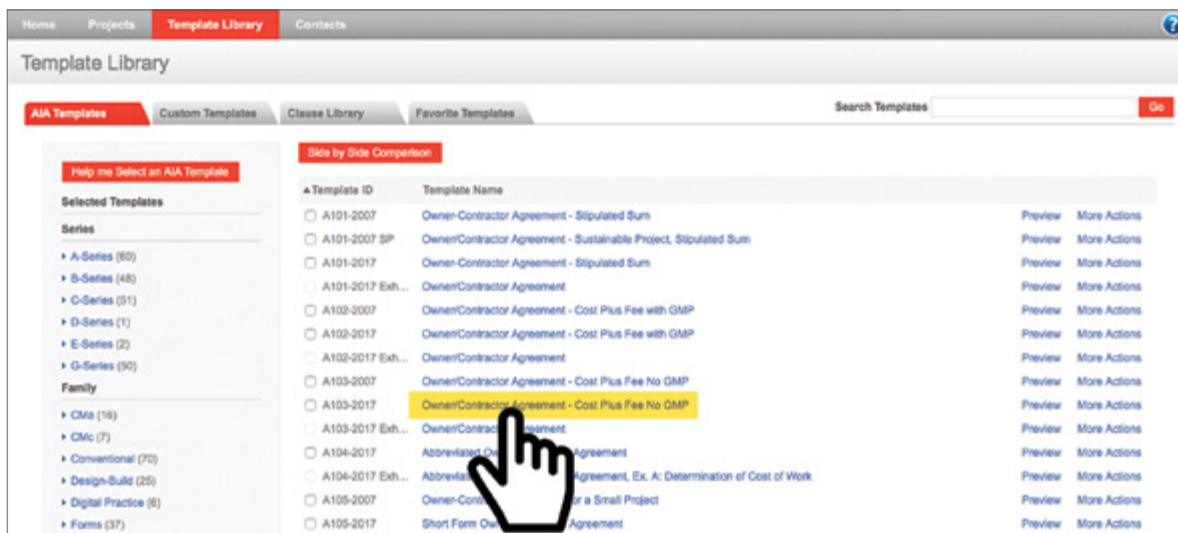
Once the draft has been successfully saved, you can start editing using the tools and options available in the online editor. [See more information on tools and options here.](#)

b. Create a document from the Template Library

At the top of the page, [click on Template Library](#) and then [click on the template](#) you want to use under **Template Name**.

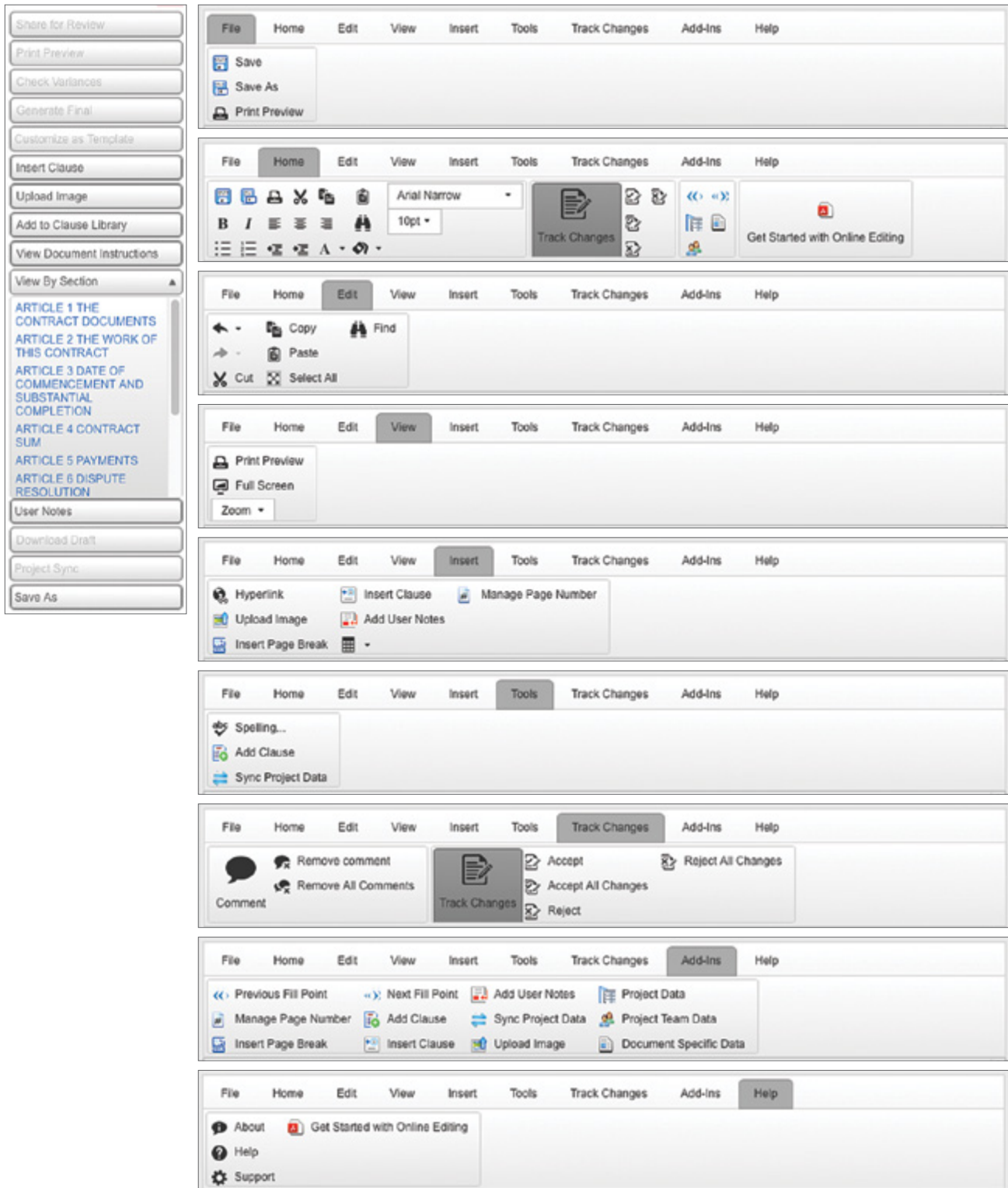
The draft is opened online in the ACD5 Online Editor. [Click the Save icon](#), to save the draft to one of your projects. After selecting a Project, [click OK](#). If you don't have any projects, you will be prompted to create one.

Once the draft has been successfully saved, you can start editing using the tools and options available in the online editor below. [See more information on tools and options here.](#)



Step 2 – Editing Documents

General Tools – Save, spelling check, add a note, insert clause, track changes, upload image, add document specific, add project team data, etc.



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Data Dialog Tools – Allow you to use optional dialogs to edit your document. Data Dialogs let you see, scroll through, and fill in all the data entry fields in a consolidated form that is separate from your document. If you chose to edit a data field directly within the draft document, then this edited data is automatically updated into the corresponding field in the Data Dialog when you reopen it. In order for this feature to work correctly, it is important for you not to delete the chevron symbols for that field in the draft document. Entering data between the chevrons (<< >>) ensures that it will be recognized by the dialog.

The screenshot displays the 'Data Dialog' window for the A101-2017 contract document. The dialog has a red header bar with the title 'Data Dialog' and a close button. Below the header, the document title 'A101-2017' is shown, followed by a 'Document Instructions' button. The main content area is divided into three tabs: 'Project', 'Project Team', and 'Document Specific Data'. The 'Project Team' tab is selected, showing the 'Owner' section. The 'Owner' section includes fields for 'Name', 'Legal Entity', 'Address', 'Telephone Number', and 'Fax Number'. The 'Name' field is currently empty and has a dropdown arrow. The 'Legal Entity' field is empty. The 'Address' field is empty. The 'Telephone Number' field is empty. The 'Fax Number' field is empty. The 'Owner's Representative' section is also visible at the bottom of the dialog. The background shows a portion of the AIA contract document interface, including a sidebar with various tools and a main area with contract text.

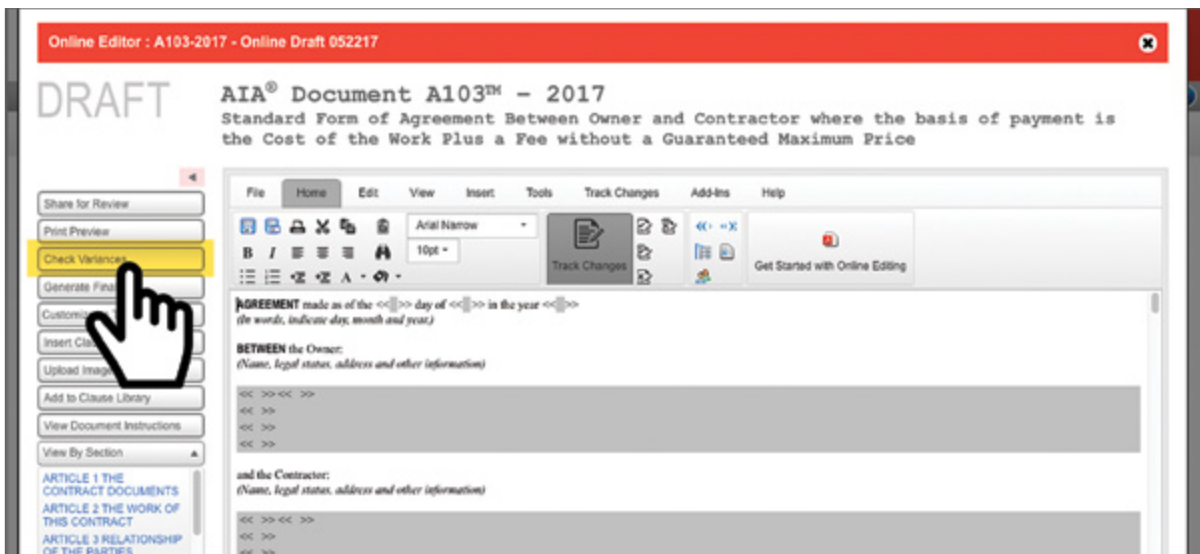
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Step 3 – Variance Check

You can review changes prior to finalizing a document by clicking **Check Variances** in the **Online Editor** or on the Projects tab in **More Actions**.

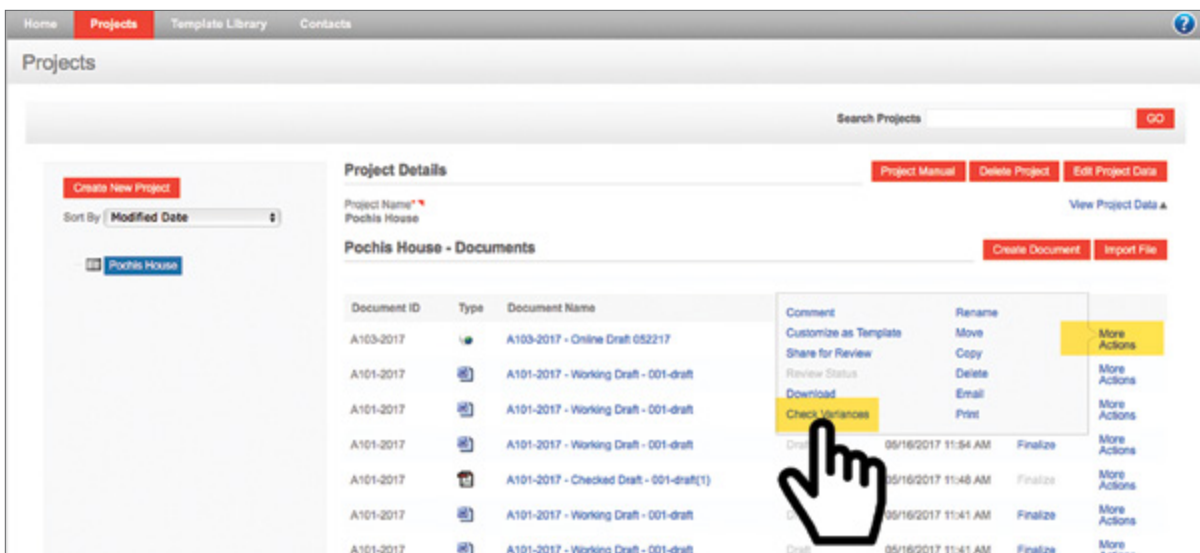
a. From the Online Editor

Open the document using the online editor. From the left pane, click **Check Variances**. This will generate your Variance Check document in a PDF file.



b. From More Actions

From **More Actions** next to the document, 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 finalize your document.



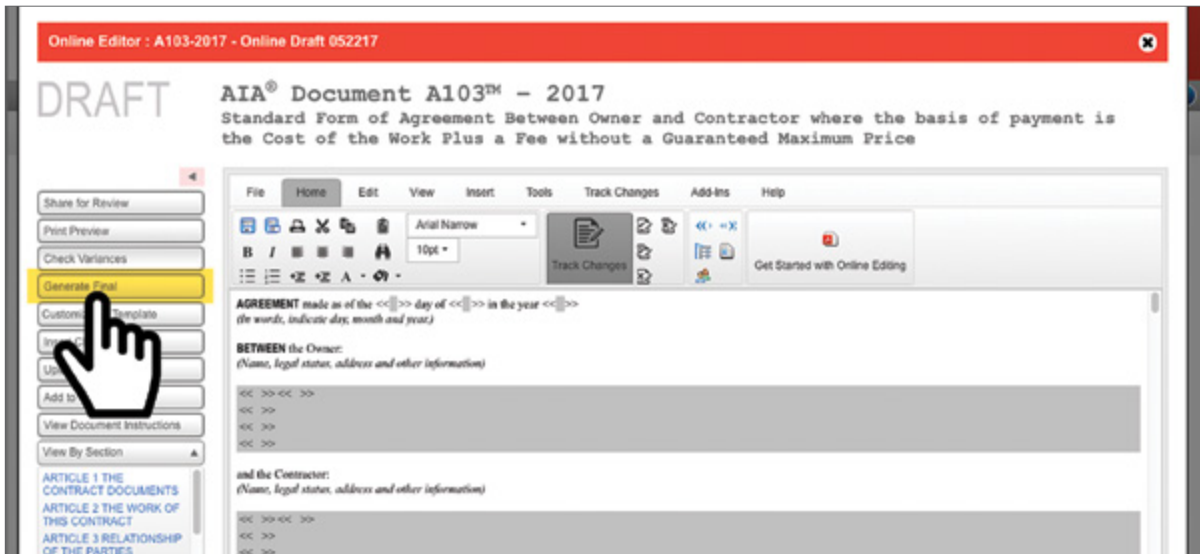
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Step 4 – Finalize

When your edits are complete, you can finalize your document by clicking **Generate Final** in the **Online Editor** or on the Projects tab by selecting **Finalize**.

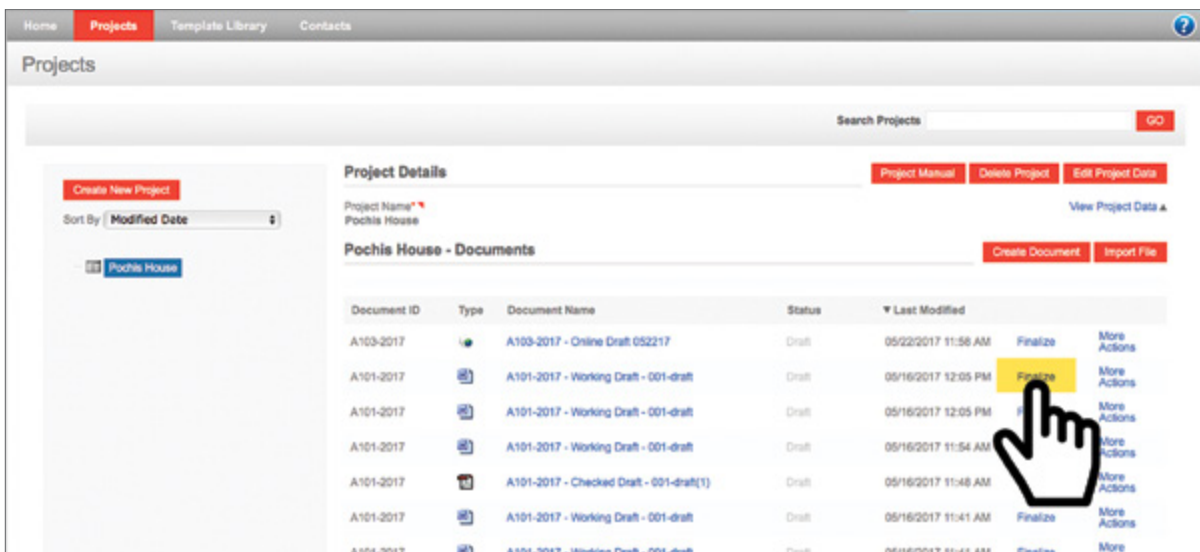
a. From Online Editor

Open the document using the online editor. From the left pane, click **Generate Final**. This will generate your final document in a PDF file.



b. From Projects Tab

Click **Finalize** next to the document, this will generate your completed document as a PDF file.



Additional Resources

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

Knowledge Base – Fully searchable and includes information for Getting Started and frequently asked questions on Document and Software.

Customer Support Site – Have questions? We have answers.

Set Default Editor – Steps for Setting Preference for Default Editor for new draft agreements.

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

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