AIA Contract Documents

# Guide to Editing Documents Online

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## About editing documents online

When you edit your documents online, you will be using the online editor. An online editor is an interface for editing AIA Contract Documents stored in the cloud. You will need a supported web browser and a connection to the internet to use the online editor. Using the online editor you can freely edit both the standard AIA text and the various data fields in the documents. If you need instructions on how to complete a document, please click the View Document Instructions button, which is located on the left of the online editor.

The online editor allows you to use dialogs (refer to the "Data dialog tools" section below) while editing your draft documents to easily fill out your document. The dialogs interact with the document, so information entered into the dialog automatically fills the document draft AIA Contract Document is recognized by the dialog. Similarly, information entered into the draft AIA Contract Document is recognized by the dialog. Entering data between the chevrons << >> ensures that it will be recognized by the dialog.

**Note:** The online editor is a great tool for making simple edits. For more complex editing, we recommend that you **work offline** to edit your document using Microsoft® Office Word if you would like to perform advanced edits such as modifying tables, resizing images, bullets, etc.

## Online editing tools

Below are the editing tools that are available for you to use within the online editor. The Home tab will provide quick access to most of these toolbars. You will find other toolbars in their respective tab as noted.

## General tools

| BUTTON | FUNCTION |
|---|---|
| | **Save this document** - Save changes to the document. If the document has not been saved before, you will be prompted to save to a new or existing project. **Watch video (32 sec)** |
| | To move between the data fields in a document, you can either navigate directly into a field using your mouse, or you can use the "Go to Previous FillPoint" and "Go to Next FillPoint" buttons on the AIA Toolbar. **Watch video** (25 sec) |
| abc | **Check spelling** – Check the spelling of your document. You will find this under the Tools tab. **Watch video** (16 sec) |
| | **Add a note to the footer** – Notes entered here will be displayed on the footer of each page. You will find this under the Insert tab. **Watch video** (34 sec) |
| | Upload image – Use to upload images from your computer to the document (images cannot be pasted to the online editor). You will find this under the Insert tab. **Watch video** (17 sec) |
| | **Insert table** – Use this to create a table in the document. You can specify how many rows and columns you would like to have. You will find this under the Insert tab. **Note:** For more advanced table edits, such as adjusting the width of a column or height of a row, please **work offline** to edit in Microsoft® Office Word. **Watch video** (20 sec) |
| | **Print Preview** – Preview your edits to the document. **Watch video** (16 sec) |
| Zoom ▾ | **Zoom** – Is the view of your document too large or too small? Use this to change the zoom level. You will find this under the View tab. **Watch video** (14 sec) |

## Track changes tools

| BUTTON | FUNCTION |
|---|---|
| Track Changes | **Toggle Track Changes on and off** – By default, track changes is turned on. Use this to enable and disable track changes. **Watch video** (38 sec) |
| | **Accept selected change(s)** – Select the track change(s) you would like to accept in the document and click on this button. **Watch video** (15 sec) |
| | **Reject selected change(s)** - Select the track change(s) you would like to reject in the document and click on this button. **Watch video** (13 sec) |
| | **Accept all changes** – All track changes will be accepted. **Watch video** (12 sec) |
| | **Reject all changes** – All track changes will be rejected. **Watch video** (11 sec) |

## Data dialog tools

| BUTTON | FUNCTION |
|---|---|
| | **Project Data** – Use to enter project information and contract details. **Watch video** (24 sec) |
| | **Sync Project Data** – If you make a change to the contents of any of the project data fields while editing a draft document, either directly in the document or through a Data Dialog, there will be a discrepancy between the project data in the document and the corresponding project data. Use this to synchronize your document and project. **Watch video** (38 sec) |
| | **Project Team Data** – Use to enter project team information. **Watch video** (27 sec) |
| | **Document specific data** – Use to enter specific document information. **Watch video** (41 sec) |

## Copying, cutting, and pasting

To perform actions like copy, cut, and paste, use the keyboard shortcuts below.

| | Keyboard shortcut | Action |
|---|---|---|
| Windows | CTRL + C | Copy |
| | CTRL + X | Cut |
| | CTRL + V | Paste |

| | Keyboard shortcut | Action |
|---|---|---|
| MAC | CTRL + C | Copy |
| | CTRL + X | Cut |
| | CTRL + V | Paste |

Due to the limitations of the web based technology, copying and pasting experience will be different in the online editor compared to **working offline** in Microsoft® Office Word. Below are a few things to note when using copy and paste:

**Copying and pasting text:** If you are pasting text to the online editor (from copying outside the online editor or inside), some font effects such as font, color, highlighting, and size will be removed. You can reapply the formatting once pasted.

**Copying and pasting images:** Images cannot be pasted to the online editor. Use the upload image toolbar.

**Copying and pasting hyperlinks:** URLs will be preserved. However, some font effects such as font type, color, highlighting, and size will be removed. You can reapply the formatting once pasted.

**Copying and pasting list (ordered or unordered):** When copying and pasting lists (e.g. bullets and numbering) with multiple levels, the structure will not be preserved. It is best to remove the list formatting prior to pasting and reapply the list formatting in the online editor.

## Opening offline documents online

If you started editing your document offline using Microsoft® Office Word, we recommend continuing to work offline for the best experience and upload your document back to ACD5 when you are ready to finalize your document. However, if you would like to open your offline document online, below are a few things to note:

**Text is not displaying after bulleted items:** To work around this issue, open the offline Microsoft® Office Word document and copy and paste the bulleted items to the online editor. You may need to re-apply formatting, please see about "Copying and pasting list (ordered or unordered)"

**Text that do not have bold format offline is displaying with bold format online:** To work around this issue, select the bold text and click on B and this will unbold the text.

## Check variance and generate final

After editing your document, you can either variance check it or generate a final from it. Below is the information about these two options.

**Check variance** - Variance checking is the process of comparing your edited Working Draft (all A, B, C, and E-series documents, as well as G601 and G602) against the original AIA master document and then generating a third document that notes the differences.
**Watch video** (3min 33sec)

Click the **Check variances** button on the left of the online editor and choose how you would like to variance check the document:

- **Clean in PDF** - The additions to and deletions from the document are indicated in the margin, parallel to where the changes occur. The details of the changes are appended to the document in an Additions and Deletions Report (with page references). This document is called a Checked Draft and is a locked PDF file.
- **Comparative in PDF** - All changes are noted in-line in the document, marking additions with underlining and deletions with strike-throughs. This document is called a Checked Draft and is a locked PDF file.

**Note:** Users with Documents-on-Demand Plus license should take advantage of the Check variance function to preview completed documents prior to generating a final and consuming your license.

**Generate final** - Once all collaboration is complete, and the document has been edited and checked, you can generate a Final version. Final documents are always produced in read-only PDF format, and can be printed and/or e-mailed. **Watch video** (2min 17sec)

Click the **Generate final** button on the left of the online editor and choose how you would like to finalize the document.

- **Clean in PDF** - All the additions to and deletions from the document are indicated in the margin, parallel to where the changes occur. The details of the changes are appended to the document in an Additions and Deletions Report (with page references).
- **Comparative in PDF** - All changes are noted in-line in the document, marking additions with underlining and

**Note:** If you are a Documents-on-Demand Plus customer, you can only finalize a document once. However, if you need to finalize a document again, go to the Template Library, click More Actions and re-purchase your document again.

## Additional resources

- **ACD5 Training Tools** – We provide ACD5 training tools such as webinars, video tutorials, and beginners guide to ACD5.
- **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.