Editing Documents Offline

AIA Contract Documents Online (ACD5) offers two options for editing documents depending on your needs:

- Offline – using Microsoft® Office Word
- Online – using ACD5 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 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

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

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. **Steps for Online Editing**.

Limitations:

- Online Editor is a lite web browser–based editor, which does not provide all the available features which Word offers and you are 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

Steps for Offline Editing
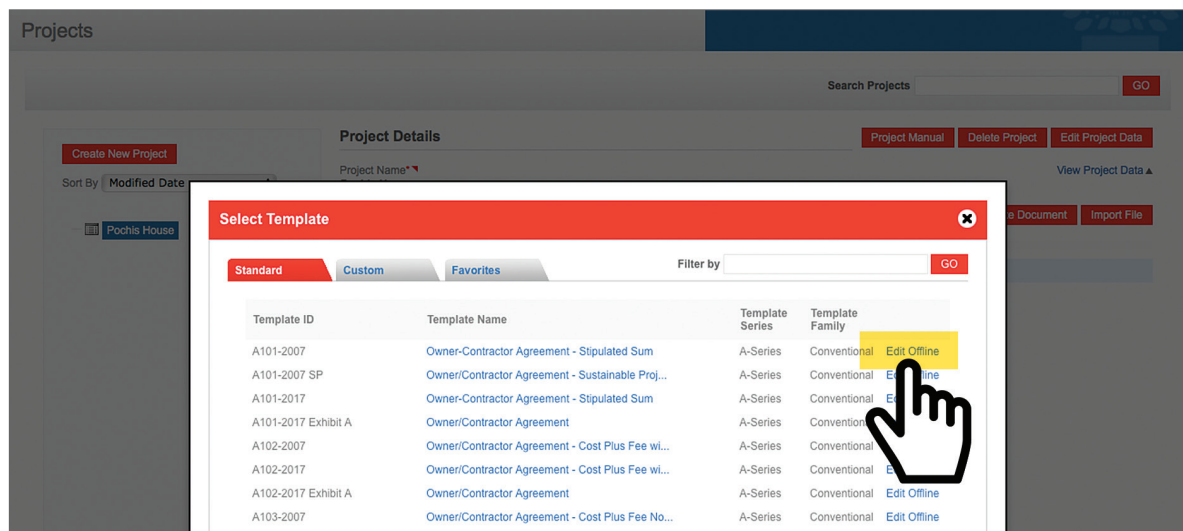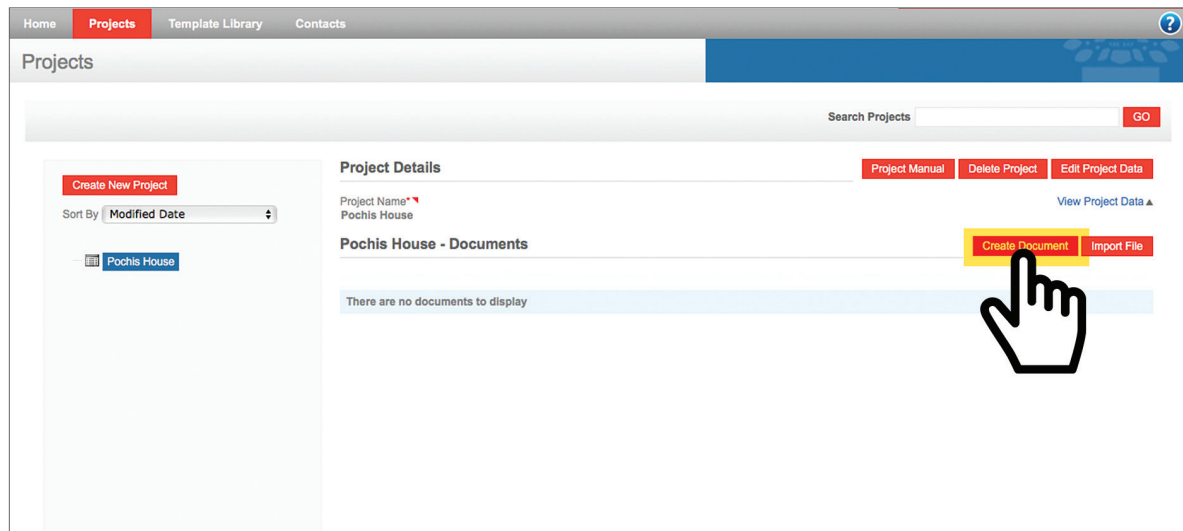
Step 1 – Download

a. Creating a document from the Template Library

At the top of the menu, click on **Template Library** and then click on **More Action** 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.
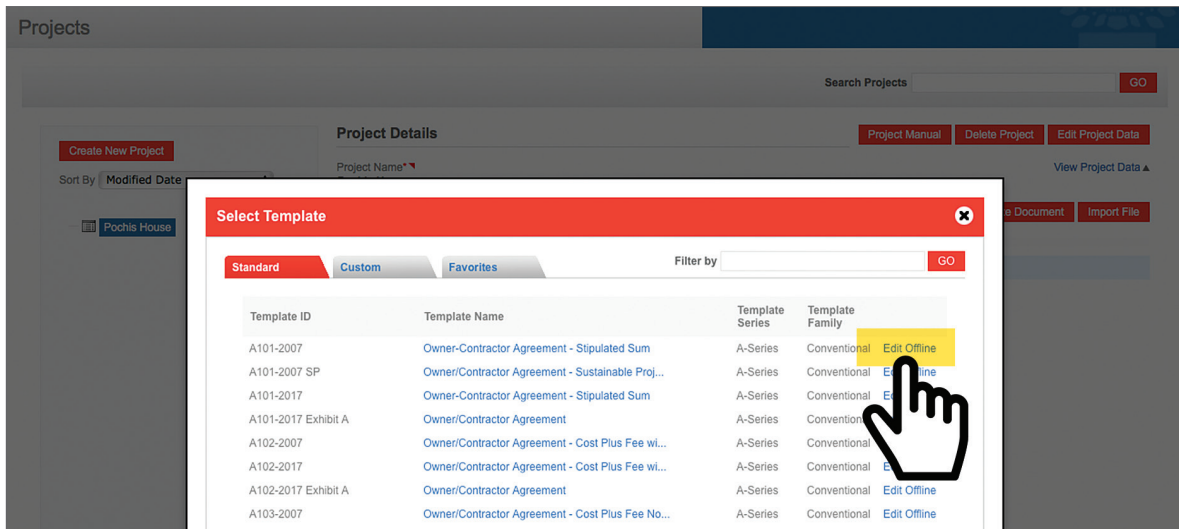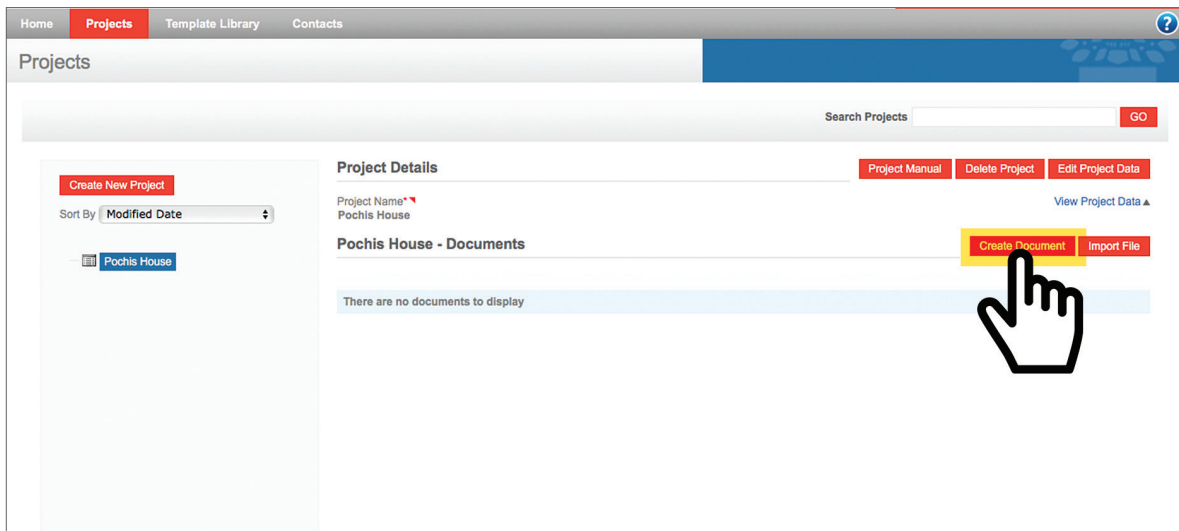
b. Creating Document from Projects

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**.


Step 2 – Edit

Open the downloaded document in Microsoft® Office Word to make your edits and save your document locally.

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.**

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Step 3 – Upload

Log back in the ACD5 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.

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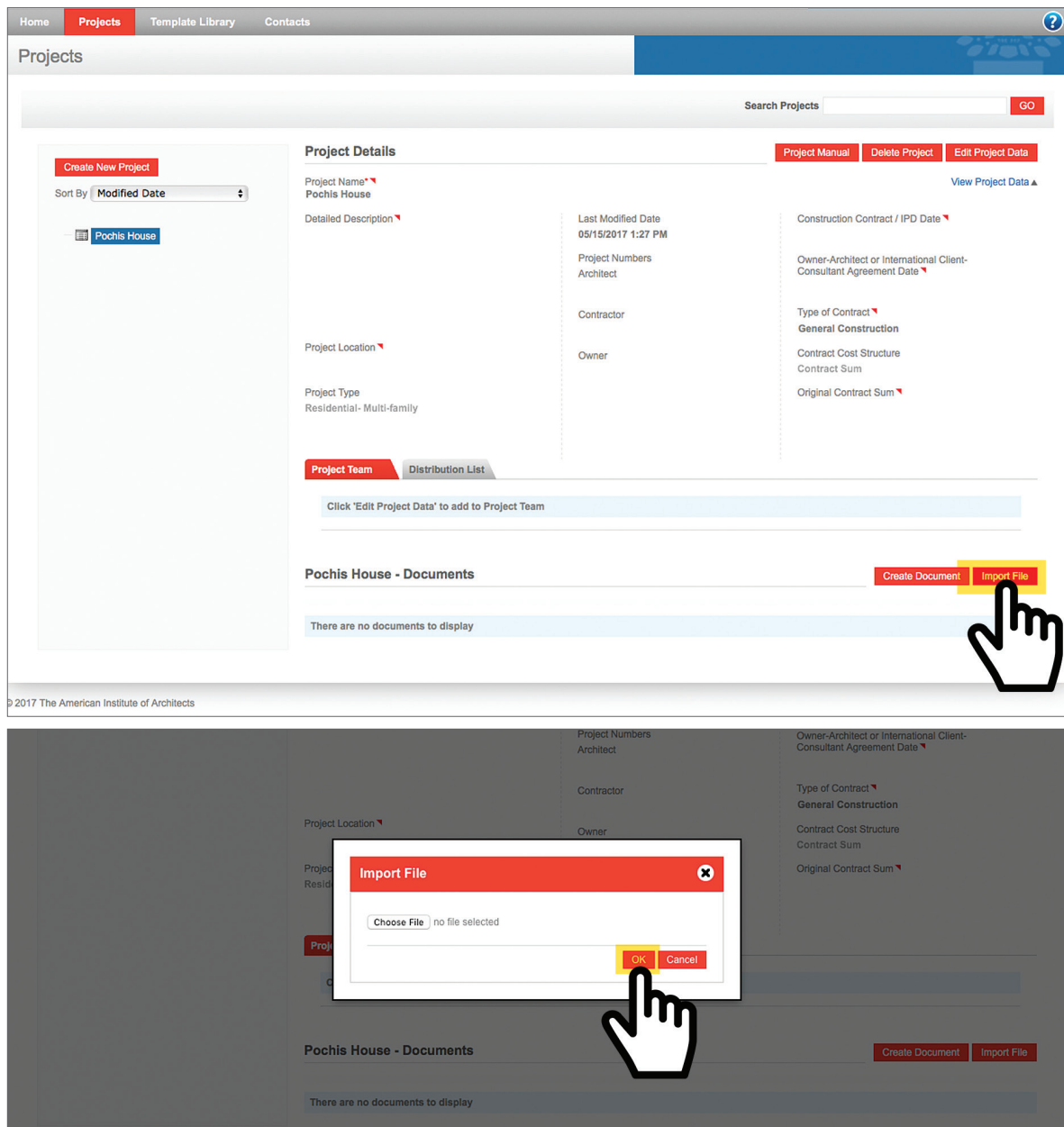
Step 4 – **Variance Check**

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 finalize your document.

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Step 5 – Finalize

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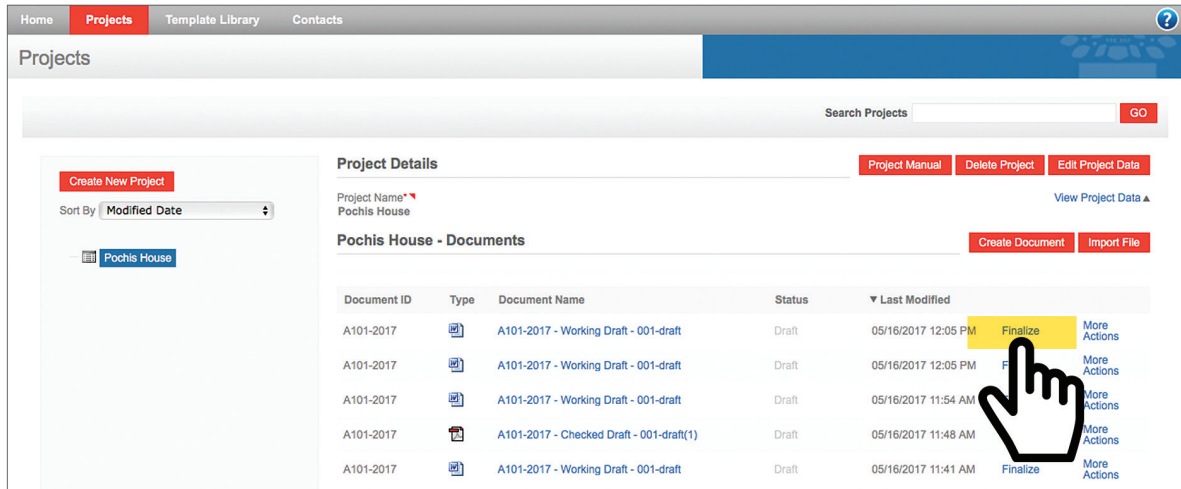
Additional Resources

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.

Offline Editing – Steps for Offline Editing. Watch video >

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