

Beginner's Guide

Online Service for Multi-Users

A step-by-step guide to creating, editing, sharing and managing contract documents

AIA Contract Documents

Beginner's Guide to AIA Contract Documents for Multi-Users

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Getting Started – Introducing AIA Contract Documents Online Service

What is AIA Contract Documents?

AIA Contract Documents is an online document automation service that allows you to manage your project data and generate contract documents. You can access your projects and documents anytime and from anywhere using your favorite browser (Internet Explorer, Firefox, Chrome or Safari) for the PC or the Mac.

The service provides more than 200 construction contracts and forms that can easily be edited, shared for review, and finalized. Four tabs organize main page of the online service; the Home tab includes your most recently accessed projects and documents; the Projects tab provides quick access to all your projects and related contracts and forms; the Templates Library tab stores all of the standard AIA Contracts and forms available for editing; and the Contacts tab saves all firms and representatives from past projects.



System requirements

Basic requirements for AIA Contract Documents include:

- A high speed internet connection. The minimum connection speed for the AIA Contract Documents online service is 512kbps; connection speeds of 1000kbps or higher are recommended.
- A current web browser (Safari, Chrome, Firefox, IE, or Edge)
- Adobe Acrobat Reader 9 or higher
- If choosing to edit offline, a current version of Microsoft® Office: 2008 (Mac), 2010, 2013 or 2016 is required
- The AIA Document Mover requires Microsoft® Net Framework version 4

Transition from desktop version

If you are moving from the desktop version of AIA Contract Documents software to the online version, you can migrate your projects, documents and contacts for use online. The instructions below will assist you in doing so. Please note that it is not recommended to migrate all of the work you completed in the desktop software. By default, all of your projects are stored in the Documents folder of the computer in which the desktop software is loaded.

Running the migration

- Click “[Get the AIA Document Mover Utility](#)” in the “Getting Started” area of the “Home” tab to download the migration utility setup file. You can also access the AIA Document Mover Utility here: <https://contractdocs.aia.org/migrationutilitydownload.html>. When the download is complete, **double-click** the [AIADocumentMover.msi](#) file to begin the installation.
- When the “Application Install Security Warning” displays, **click** the **Install** button to run the installation.
- When the installation is complete, you will be prompted to sign in. Type your login ID and password in the spaces provided and **click** the **Sign In** button.
- After a successful sign in, a brief migration welcome message is displayed followed by the Migration Tool screen.
 - The AIA Document Mover allows you to choose which projects and within those projects which documents are moved to the online service.
 - The AIA recommends moving projects one at a time, as needed.
 - Files over 5MB will not be moved, instead can be imported.
 - You will not be able to access the desktop software or online service while your documents are being moved.
- Once you have selected the items you want to migrate, **click** the **Move Selected Data and Documents** button. You will be prompted to confirm the migration of the selected items. **Click OK** to continue the migration.
- When the migration is completed, “Migration Completed” is displayed. **Click Go to Online Account** to log into your AIA Contract Documents online account, or **click Close** to close the message and remain in the Migration Utility.
- To view the status or history of the migration, **click** the  and  buttons to expand or close the **Status** or **History** panes.

Company settings

The Company Settings panel is available for companies with multi-user licenses only. It allows the Administrator to manage users and groups, configure project and group permissions, and publish global clauses, contacts, and custom templates.

Company Settings

Information

License Information

Product Type	Unlimited - 50 Users
Logins	50
Logins Used	7
Logins Available	43



Storage Quota	9999 MB
Storage Used	318 MB
Storage Available	99681 MB



Product	Order Number	Days Remaining	
Annual Unlimited License for 50 Users	XXXXXXXX	23 Day(s) (03/23/2018)	You will be billed on 03/23/2018 Renew Upgrade
Purchase Additional Storage	10 GB 50 GB		

[Change Password](#)
[Users](#) | [Groups](#) | [Projects](#) | [Custom Templates](#) | [Clauses](#) | [Contacts](#)
[Get Started with Multi-User Administrator Guide](#) [Add User](#)

Name	User ID	UserType	Status		
User 1	user1@email.com	User	Invited	Remove	ChangeRole
User 2	user2@email.com	User	Active	Remove	ChangeRole
User 3	user3@email.com	User	Invited	Remove	ChangeRole
User 4	user4@email.com	UserAdmin	Active	Remove	ChangeRole
User 5	user5@email.com	User	Active	Remove	ChangeRole
User 6	user6@email.com	User	Invited	Remove	ChangeRole
User 7	user7@email.com	User	Invited	Remove	ChangeRole
User 8	user8@email.com	User	Invited	Remove	ChangeRole
User 9	user9@email.com	User	Invited	Remove	ChangeRole
User 10	user10@email.com	User	Active	Remove	ChangeRole

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The administrator role

Each multi-user license must have at least one designated license Administrator. The Administrator manages access to the multi-user license, configures the security features, and publishes global custom templates, clauses, and contacts. For your flexibility, Administrators can be designated as follows:

Administrator – Manages users, permissions, and publication of global files but does not have access to other software functions except the ability to renew the license. This account does not count as one of the users in the multi-user license.

Administrator/User – Performs the same duties as an administrator but can also access all software functions. This account counts as one of the users in the multi-user license.

QUICK TIP 1

You may designate one or more of the existing users as a **backup Administrator** for times when the primary Administrator is not available.

Users

Administrators manage users by inviting new users to join the license or restricting access when necessary.

Adding users

- Click the [Add User](#) button on the Users tab under Company Settings. The Add User dialog appears.

- Type the user's name and e-mail address in the spaces provided.
- Click OK.
- The Add User dialog is displayed with the message "The Email has been sent to the user [user_name] at [e-mail address]."
- Click OK.
- The user is added to the users list with a status of "Invited," and a welcome e-mail is sent with instructions for accessing AIA Contract Documents and logging in.

Removing users

- Change the desired user's status from Active to Inactive on the dropdown menu.
- Confirm status change by clicking OK when prompted with the message "Are you sure you want to change the status for this user from Active to Inactive?"
- Click the Remove link located to the right of the user's name.
- The Remove User dialog is displayed with the message "Are you sure you want to Remove the "[user_name]" from Multiseat license?"
- Click OK to remove the user, or click Cancel to exit from dialog without removing the user.

Groups

Administrators can create groups and add users to each group.

Creating a user group

- On the Groups tab, click the Create New Group button. The Create New Group dialog appears.
- Type the name of the group and a short description in the spaces provided.
- Click OK.

Adding users to a group

- On the Groups tab, click the group name. A list of the members of the group is displayed.
- Click the Edit button.
- Click the Add Members from Current User button at the bottom of the screen. The Add Member to Group dialog is displayed.
- Select the check boxes for the users you want to add to the group.
- Click the OK button. The users are added to the members list for the group.

Group permissions

In AIA Contract Documents, access and permissions are managed at the group level. There are two levels of permissions that the Administrator can designate:

QUICK TIP 2

By default, all users are added to **“Everyone” group**, which has Read/Write permissions for all projects.

Read – allows a user to view data for a project but not change it.

Read/Write – enables all functions.

If a user is in groups with Read and Read/Write permissions to a certain project, the more restrictive permissions will apply.

Adding groups to a project

- Under Company Settings, **click** on the **Projects** tab.
- **Click** the **project name**. A list of the groups that have access to the project and their access levels is displayed.
- **Click** the **Edit** button.
- **Click** the **Add Group** button at the bottom of the screen. The Add Groups dialog is displayed.
- **Select** the **check boxes** for the groups you want to add to the project, and **select** the **level of access** (Read & Write or Read) from the drop-down menu.
- **Click** the **OK** button. The groups are added to the permissions list for the project.
- **Click** the **Save** button to save your changes or **Cancel** to exit without saving changes.

Adding groups to multiple projects (bulk permissions)

- With the Projects tab selected, **click** on **Bulk Permissions**.
- Select a group and the appropriate permissions to apply to your project(s) (Read & Write, or Read).
- Select the project(s) you would like to apply the group and permissions to.
- **Click Apply**.

Removing a group from a project

- **Select** the **check box** for the desired group and **click** the **Remove Group** button.
- The group is removed from the project (no confirmation message).
- **Click** the **Save** button to save your changes, or **click Cancel** to exit without saving changes.

Deleting a project from company settings

- On the Projects tab, **click** the **Delete** link for the project you want to delete.
- The confirmation message “Are you sure you want to delete the project “[project_name]”? Deleting a project will delete all the folders and documents contained within the folders” is displayed.
- **Click OK** to delete the project, or **click Cancel** to exit without deleting the project.

Global objects

For companies with a multi-user license, the Administrator can publish custom templates, clauses, and contacts so they are available to all company users.

Publishing and unpublishing global custom templates

For companies with multi-user licenses, the Administrator can publish user-specific custom templates so they can be accessed by other company users of AIA Contract Documents.

Once a custom template is published as a global template, only the Administrator may edit it or unpublish it. If the Administrator chooses to unpublish a global custom template, it will once again be made local to the user who created it.

To publish a global custom template:

- Under Company Settings, **select** the **Custom Templates** tab.
- For the desired user-specific template, **click Publish**.
- When the confirmation message “Are you sure you want to Publish the Template, ‘[template_name]’?” is displayed, **click OK**. A message will appear stating that the template was published.

To unpublish a global custom template:

- On the Custom Templates tab, **click Unpublish** for the desired global template.
- The following confirmation message is displayed: “Are you sure you want to un-publish the Template, ‘[template_name]’? Note, un-publishing the custom template will cause it to no longer be available to the system users. Any Document that has already been created using this template will not be affected.”
- **Click OK** to unpublish the template.

Publishing and unpublishing global clauses

For companies with multi-user licenses, the Administrator can publish user-specific clauses so they can be used by other company users of AIA Contract Documents. Once a clause is published as a global clause, only the Administrator may edit it or unpublish it. If the Administrator chooses to unpublish a global clause, it will once again be made local to the user who created it.

To publish a global clause:

- Under Company Settings, **select** the **Clauses** tab.
- Locate the desired user-specific clause and **click Publish**.
- When the confirmation message “Are you sure you want to Publish the clause, ‘[clause_name]’?” is displayed, **click OK**. A message will appear stating that the clause was published.

To unpublish a global clause:

- On the Clauses tab, **click Unpublish** for the desired global clause.
- The following confirmation message is displayed: “Are you sure you want to unpublish the Clause, ‘[clause_name]’? Note, Unpublishing the clause will cause it to no longer be available to the system users. Any Document that has already been created using this will not be affected.”
- **Click OK** to unpublish the clause.

Publishing and unpublishing global contacts

For companies with multi-user licenses, the Administrator can publish user-specific contacts so they can be used by other company users of AIA Contract Documents.

Once a contact is published as a global contact, only the Administrator may edit it or unpublish it. If the Administrator chooses to unpublish a global contact, it will once again be made local to the user who created it.

To publish one or more global contact(s):

- Under Company Settings, **select** the **Contacts** tab.
- **Select** the checkboxes next to the desired contacts and **click Publish**.
- When the confirmation message “Are you sure you want to Publish the selected contact?” is displayed, **click OK**. A message will appear stating that the contact was published.

To unpublish a global contact:

- On the Contacts tab, **click Unpublish** for the desired global contact.
- The following confirmation message is displayed: “Are you sure you want to unpublish the contact for firm, ‘[firm_name]’ ? Note, Unpublishing the contact will cause it to no longer be available to system users. Any Document that had already been created using this contact will not be affected.”
- **Click OK** to unpublish the contact.

Create a project

The AIA Contract Documents online service is project-centric, which means information and documents are created and stored by project.

When you create a project, you will need to provide certain project information, such as the project description and party names. This information is stored and automatically entered into all the documents you create for the project.

All documents and imported files associated with a project are listed at the bottom of the Project Data screen. You can create subfolders to further organize your project documents.

Creating a project from the projects tab

If you know the project data, start here. You can add data later and use the sync feature as needed (*please refer to Quick Tip 1 for more information on project sync*).

- Click the **Projects** tab. A list of your projects is displayed. The first project in the list is automatically selected and its information is displayed in the Project Detail window.
- Click the **Create a New Project** button at the top of the Projects page. The Project Detail dialog is displayed with blank spaces into which you can enter the project name and relevant general information.
- When finished, click the **Save Project** button. A message will appear stating that the project was saved successfully.

Creating a project from a document

If you decide to create a document rather than enter project data, a new project can be created using data provided within a document. Follow these steps if you want to select the first document in a project and create the project at the same time.

- Select the **Template Library** tab.
- In the Template Library, locate the desired template and **click its name** to display it in the Online Editor.
- From the Online Editor menu, **select Save** to save the template to your project folder or **Save As** to specify a different project or folder.
- In the Save Document As dialog, **click the New Project** button.
- In the Create New Project dialog, **type the project name** and **click the Save Project** link.
- Your project appears in the list of projects. **Click OK** to close the Save Document As dialog.

QUICK TIP 3

When you edit project data, your changes will automatically be included in any new documents you create. However, documents that were created before you made your changes must be individually updated using **Project Sync** button in the Online Editor. To sync the document and the project, do one of the following:

- Select **Tools > Sync Project Data** from the menu.
- Click the  button in the toolbar.
- Click the **Project Sync** button in the sidebar.

Once the Project Sync window opens, you can sync the document and project data by either:

- Selecting one or more of the check boxes for either the document or the project and clicking the buttons to sync the selected items.
- Clicking the **Copy all to Project** or **Copy all to Document** link to sync all items.

- Click the **Close Window** link to close the Forms Editor.
- Select the **Projects** tab to display the Project Detail dialog. If the Project Detail dialog is collapsed, **click the View Project Data** link to reveal it.
- Enter the general **project information** and **click Save** when finished.

Revise an existing project

After a project has been saved, you can edit the project data at any time.

- On the Projects tab, **select the project**.
- If the project data is not displayed, **click the View Project Data** link to reveal it.
- Click the **Edit Project Data** button to enable changes, if necessary.

- Make changes to the project data as needed. You can also make changes to the project team and distribution list and add or remove project documents.
- When finished, [click](#) the [Save Project](#) button. A message will appear stating that the project was saved successfully.

Find the right document

AIA Contract Documents are organized by family or series and you can search, sort, filter and compare documents. There are multiple ways to find the documents you need.

Search:

- [Click](#) the [Templates Library](#) to reveal a listing of all the AIA templates. By default, the documents are listed alphabetically by series.
- Next to each document is a Preview button which opens a sample copy of the standard document.
- [Click](#) the [More Actions](#) link to access a document summary and instructions.
- Just above the template listing is the [Search Templates](#) field where you can [enter any search](#) terms you wish. [Clicking Go](#) will perform a full-text search of all the templates that contain that key word or phrase. [Click](#) the [Show Advanced Options](#) button to narrow your search.

Sort:

- You can narrow the selection of documents by sorting them by Series, Family and/or Parties Involved on the left hand side of the Templates Library tab.
- [Clicking a link](#) on the left-hand side will place the category under the Selected Templates section and limit your search to the specific criteria. You can remove any criteria if you want to widen the search.

Filter:

- [Click](#) on [Series](#) or [Family](#) or [Parties Involved](#) to restrict the list of documents shown.
- You can also remove the filters to revise the list of documents to better fit your needs.

Compare:

- [Select 2-3 documents](#) and [click](#) on the [Side-by-Side Comparison](#) button if you are deciding among several agreements. This tool is for use on agreements only. The table compares the documents, showing key differences between them. You can compare up to 3 documents at a time.

“Help Me Select an AIA Template” tool:

The Help Me Select an AIA Template button on the left-hand side of your screen is another way to help you find the document that you need.

- You will be asked a series of questions designed to assist you in narrowing your options to a handful of documents so you can select the right agreement or form easily.

- Make selections in response to the questions that are asked. Click the red **Next Question** button to advance.
- The listing of AIA templates appearing in the center of the Templates tab will adjust based on your responses.

Create an agreement

Draft agreements can be created from standard or custom templates and can be fully edited either in the online editor or offline in Microsoft Word. **Offline editing is recommended, especially for agreements.** You can set your default settings to Always Offline (Microsoft Word) by clicking the **My Settings** link on the upper-right hand side of your screen and selecting the Document tab.

To create a draft agreement for a specific project:

- Click the **Projects** tab.
- **Open the desired project** in the Projects list on the left side of the screen and, if applicable, the desired subfolder within the project.
- Click the **Create Document** button. The Select Template dialog is displayed.
- Navigate to the desired template (on the Standard, Custom, or Favorite Templates sub-tab) and **click the template name**.
 - The templates list can be sorted by ID, name, series, or family by **clicking the column headers**. You can filter the documents using the Filter by field.
- You may be prompted to select additional information about your document. Answer the questions and **click OK**.
- Click the **name of the document** to open in the online editor. Click **Edit Offline** to open in Microsoft Word.

Working offline

To work offline, you'll need the Microsoft Word and Excel applications on your computer, whether it's a PC or a Mac.

To download an agreement or form that you have saved in a project:

- **Go to the Projects** tab.
- **Select a project** from the Projects list, and then in the Documents section of the project page **click Create Document**.
- **Click Edit Offline** to the right of the document you would like to open in Microsoft Word or Excel.
- Save the document to a location in your computer.
- Make all of your edits offline.

Once you have finished revising your draft document, you will need to import the file into the online service to generate a final document. To upload an offline document:

- Go to the **Projects** tab.
- Choose the **appropriate project** from the Projects list and **click** the red **Import File** button within the project.
- **Click Choose File**, select the file you wish to upload and **click Import**.
- After your document has been imported, do not reopen the document.
- As a last step, **click Finalize** to the right of the imported Word document to generate a final.

Working online

The Online Editor can be used for some forms. **Click** on the **template name** to open the document in the Online Editor. The text of the document appears in the editing window

Navigation and document management functions appear in the sidebar, on the left.

The most commonly used editing features are grouped on the toolbars immediately above the editing window.

Create a form

Draft forms are created from standard templates. Editing of forms is limited to the fill-points.

To create a draft form for a specific project:

- **Click** the **Projects** tab.
- **Open** the **desired project** in the Projects list on the left side of the screen and, if applicable, the desired subfolder within the project.
- **Click** the **Create Document** button. The Select Template dialog is displayed.
- Navigate to the desired template (on the Standard or Favorite Templates sub-tab) and **click** the **template name**. The templates list can be sorted by ID, name, series, or family by **clicking** the **column headers**. You can filter the documents using the Filter by field.
- You may be prompted to select additional information about your document. Answer the questions and **click OK**.
- The draft agreement is opened in the Form Editor for further editing.

Customize a template

AIA Contract Documents provides you with the ability to customize agreement templates with your standard edits and then use those customized templates as the basis for your draft documents. You can also create custom templates from draft agreements, and share them with other users in your company. Standard and custom templates can also be added to your list of favorites for easy access when creating documents.

Creating a custom template from a standard template

- In the Templates Library, **go to the AIA Templates** sub-tab and locate the template you want to customize.
- **Right click** the **More Actions** link and **select Customize Template** from the popup menu. The Customize as Template dialog is displayed.
- **Type a new name** for the template or leave the default name unchanged and **click OK**.
- When the Important Note is displayed, read the message and **click OK**.
- The template is displayed in the Template Editor. You can make any edits you require.
- After you have completed your edits, **select Save** to save the template on the Custom Templates tab without changing its name or **Save As** to save it with a new name.

Creating a custom template from a draft

- On the Projects tab, **select the project** containing the document you want to use as a template.
- Locate the desired draft document, **right click** the **More Actions** link from the popup menu, and **select** the **Customize as Template** option. The Customize as Template dialog is displayed.
- **Type a name for the new template** or leave the default name unchanged. You can also enter a note in the Comments box, if desired.
- **Click OK**. Your draft is saved as a template on the Custom Templates sub-tab in the Templates Library. When you create a Custom Template from a draft, the software will remove project data from the fill-points.

Adding a custom template to your favorites

- In the Templates Library, locate the desired template on either the AIA Templates or Custom Templates sub-tab.
- **Right click** the **More Actions** link and **select Add to Favorites** from the popup menu. The Add to Favorites dialog is displayed.
- **Type a short, relevant name** for the template as you want it to appear in your favorites or leave the default name unchanged.
- **Click OK**. The template is listed on the Favorite Templates sub-tab.

Importing offline documents to your custom templates

- In the Templates Library, **click** the **Custom Templates** sub-tab.
- **Click** the red **Import Template** button.
- **Click Browse and select** the desired Microsoft Word document.
- **Click OK**.

Using the clause library

Clauses are one or more paragraphs of text that you can create, edit, and add to your online editor documents. They can be inserted anywhere in draft or custom templates for any of your projects, and they can be used multiple times.

You can create clauses by typing the text, copying text from a draft, or pasting text from an offline document. Clauses do not support special formatting or images.

Clauses can be organized into categories to make them easier to access.

Creating a clause

You can add a clause to the Clause Library as follows:

- In the Template Library tab, **select** the **Clause Library** sub-tab.
- **Click** the **Create Clause** button. The Create Clause dialog is displayed.
- **Type a meaningful name** for the clause in the Name field.
- **Type or paste** the clause text in the Text field.
- **Select a category** for the clause using the Category drop-down menu, or **click** the **Add Category** button and **type a category name** to create a new category.
- Use the Notes field to enter any personal notes or comments.
- **Click OK**. Your clause is added to the Clause Library sub-tab.

Creating a clause from a document

You can add a clause to the Clause Library sub-tab from a document in the Online Editor as follows:

- In the Online Editor, **highlight the text** you want to use from your document and **select** the **Add to Clause Library** button from the left-hand side. You can also **select Tools > Add Clause** from the toolbar. The Add to Clause Library dialog is displayed with the text you selected in the Text field.
- **Type a meaningful name** for the clause in the Name field.
- **Select a category** for the clause using the Category drop-down menu, or **click** the **Add** button and **type a category** name to create a new category.
- Use the Notes field to enter any personal notes or comments.
- **Click OK**. Your clause is added to the Clause Library.

Inserting a clause

You can add a clause from the Clause Library to a document in the Online Editor as follows:

- **Position the cursor** where you want to insert the text in your document.
- **Select** the **Insert Clause** button or **select Insert > Insert Clause** from the toolbar. The Insert Clause to the Document dialog is displayed.
- **Locate the clause** you want to insert and **click Insert**. The text is inserted in your document.

Understanding the variance checker

AIA Contract Documents allows you to check a working draft against the original AIA standard template and note any differences. 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 standard template language.

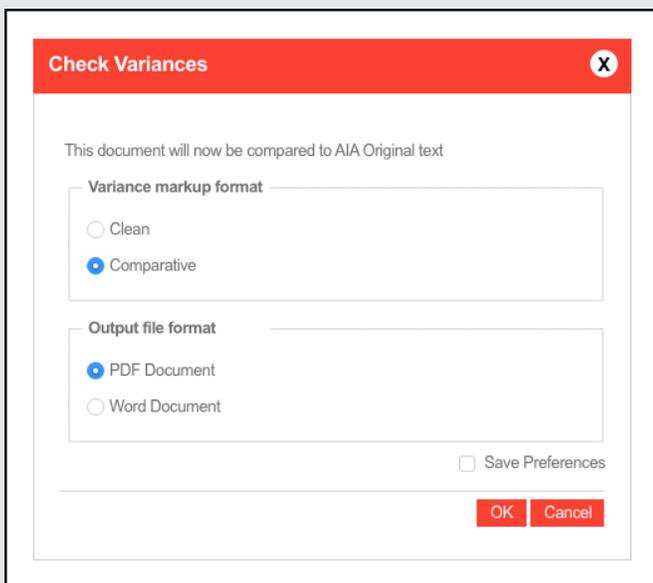
The Variance Checker focuses on the net changes between your draft and the AIA standard template. If you have used Track Changes while editing, the Variance Checker first accepts all the changes in the document and then makes a word-by-word comparison against the original AIA text.

You may variance check a working draft at any time. The Variance Checker is run automatically when you generate a final document.

Variance checking for a document can be started in either of two ways:

- From the Project Details area by [clicking](#) the [Check Variances](#) link for the desired document.
- From the within the document in the Online Editor by [clicking](#) the [Check Variances](#) button on the sidebar.
- The Check Variance dialog opens.

QUICK TIP 4



The Variance Checker focuses on the net changes from the AIA master document.

It does not work like Track Changes, which shows all additions and deletions in real time as you make them.

- [Select](#) the [Variance Markup Format](#):
 - **Clean:** Additions and deletions are indicated in the margin where they occur. The details of the changes are appended to the document in an Additions and Deletions Report (with page references). The output file format is limited to PDF.
 - **Comparative:** All changes are noted inline in the document. Additions are marked with underlining and deletions are marked with strike-throughs.
- [Select](#) the desired [Output File Format](#):
 - **PDF:** The checked draft is generated as a locked (read-only) PDF file.
 - **Word:** The document is generated in Word in DOCX format and is a working draft that you can continue to edit.
- [Click OK](#).

Finalize a document

Generating a final document accepts all tracked changes and adds the AIA logo and watermark. The final document will always be a read-only PDF, which can be viewed and printed in Adobe Acrobat Reader®.

You can you can generate a final version of a working draft or form draft document in either of two ways:

- From the Documents area for the project or a subfolder, **choose** the **draft document** you would like to finalize and **click to the right** of the document.
- From the within the document in the Online Editor or Form Editor, **click** the **Generate Final** button on the sidebar.

QUICK TIP 5

AIA Document A101™ – 2017
Standard Form of Agreement Between Owner and Contractor where the basis of payment is a Stipulated Sum

AGREEMENT made as of the _____ day of _____ in the year _____
(In words, indicate day, month and year.)

BETWEEN the Owner:
(Name, legal status, address, and other information)

Cynthia Cortes
1735 New York Avenue, NW
Washington, DC
20006

and the Contractor:
(Name, legal status, address, and other information)

Best Construction Company
9300 Corporate Blvd.
Rockville, MD
20850

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

The parties should complete A101™–2017, Exhibit A, Insurance and Bonds, contemporaneously with this Agreement.

AIA Document A201™–2017, General Conditions of the Contract for Construction, is adopted in this document by reference. Do not use with other general conditions unless this document is modified.

When variance checking your documents, all edits to the original AIA standard text are noted (with a line to the left of the text), even if Track Changes option was turned off during editing.

- **Select** the **Variance Markup Format** (clean or comparative).
- **Select** the **Signature Format** (written or digital). See the Digital Signatures section for generating digital signatures.
- For the Name of the signing authority, **confirm** the **default name** or **provide another name** that is to appear on the D401 Certification of Document's Authenticity. The D401 should be signed by the person responsible for the content of the edits made to the document (typically a project manager or principal). The person who implemented the edits should not be the signatory to the D401 unless that person is also responsible for the document content.

Create/manage contacts

AIA Contract Documents manages all contacts from the Contacts tab, which provides a central location for managing your contacts.

The information stored for contacts you create is not project-specific. When creating a project, you will choose project team members from this list.

Your list of contacts can be sorted by category, firm, name, telephone number, email address, or date by **clicking** the **column headers**. Contacts must first be created before they can be added to your project team.

To create a contact:

- On the Contacts tab, **click** the **Create New Contact** button. The Create Contact dialog is displayed.
- Use the drop-down lists to **select** the **Category** into which the new contact will be placed (required) and the firm's **Legal Entity** type.
- **Type** the **name of the contact's** Firm (required).
- Enter as many other details for the firm and its representative as possible.
- **Click OK** to save the contact and **close** the dialog or **Cancel** to exit without saving changes.

Creating contacts from a document for a new project

Follow these steps when you want to create a new project and its associated contacts and team members while creating a form or document.

- **Select a template** on the Template Library tab. The Online Editor or Form Editor opens, depending on the document type.
- **Enter the project and contact information** in the spaces provided in the form or agreement.
- **Select Save** or **Save As**.
- **Click the New Project** button in the Save Document As dialog.
- **Verify the project name** as it appears in the Project Name text box and **click the Save Project** link. The project is created and the contacts are added to your contacts and to the project team members listing.
- **Click OK** to return to your document in the editing window.

Adding contacts to a project team

- Open the project and **click the Edit Project Data** button in the Project Details window to enable changes.
- On the Project Team tab, **click the Add Team Member** button. The Add to Project Team dialog appears, allowing you to add team members from your contacts.
- **Select the check boxes** for one or more of your contacts and **click OK** to add them to the Project Team list.
- **Click Create Contact** button from the Add to Project Team dialog to create a contact from scratch and save it to your global contacts.

Removing contacts from a project team

- **Open the project** and **click the Edit Project Data** button in the Project Details window to enable changes.
- On the Project Team tab, **select the check boxes** for one or more team members and **click the Remove Team Member** button. The selected team members are removed from the Project Team list.

Editing a contact

- On the Contacts tab, locate the desired contact and **click Edit Contact**. The Create Contact dialog opens, displaying the contact's existing details.
- Make your changes to the contact information as needed.
- **Click OK** to save the contact changes and close the dialog, or **click Cancel** to close the dialog without saving changes.

Deleting a contact

- On the Contacts tab, locate the desired contact and **click Delete Contact**. A warning message is displayed that states "Are you sure you want to delete the contact "[contact_name]"?"
- **Click the OK** button to confirm the deletion, or **click Cancel** to exit without deleting.

Sharing a document for review

You may need to share a draft document or form with your clients and colleagues to get their feedback before generating the final version. AIA Contract Documents provides the ability to share draft documents with other parties for online collaborative editing.

Working draft documents (all A, B, and C series documents, as well as G601 and G602) are generated with Track Changes turned on by default and each reviewer's changes are indicated by a different color.

You can share a document with collaborators in either of two ways:

- From the Project Details [click](#) the [More Actions](#) link for the document and [select Share](#) for Review from the popup menu.
- From within the document in the editing window [click](#) the [Share for Review](#) button on the sidebar. The Share for Review dialog opens.
- Verify the subject and message body and make any changes needed.
- Use the [Select from Distribution List](#) and [Select From Contacts](#) links to select recipients from your project team and contacts. You can also type email addresses for other recipients.
- [Select](#) the [Review Expiration Date](#) using the date picker to specify a completion date for the review.
- [Click OK](#) when finished.

An email will be sent to each reviewer containing a unique encrypted link that they may use to access the online document to perform their reviews.

AIA's online editor offers users online track changes. As the online track changes functionality extends one level only, please note the following when using the "Share for Review" feature:

- If the Author has enabled track changes to track her edits, the system provides the invited reviewer a copy where all the edits noted in the track changes have been accepted.
- Each Share for Review invitation is appended with a PDF formatted variance checked copy of the Author's draft.

QUICK TIP 6

Only one reviewer can access the shared file at a time. Clicking **Check In** or **Done** makes the document available to other reviewers. Reviewers may not reopen the document after clicking **Done**.

If the Author has invited multiple reviewers to review the document, and where there are edits by multiple reviewers on the same text in the Author's document, the system will only show the last reviewer's edits.

The reviewer receives the emailed invitation and begins the review process as follows:

- [Clicking](#) the [encrypted link](#) provided in the e-mail

- Reviewing and **accepting the terms** of use to access the document
- **Reviewing and editing** the document
- **Clicking Save** to save changes
- **Clicking Check In** to save changes and make the document available to other reviewers
- **Clicking Done** when the review is complete

When a document is shared for review, it is listed in your project documents with a status of **In Collaboration**. **Clicking the link** displays the Review Status dialog, showing the name of the document, the review start and end dates, the e-mail addresses of the reviewers, the status of their reviews, and their most recent activity date. When collaboration is ended the status will appear as **Review Complete**.

Creating a project manual

AIA Contract Documents provides you with the ability to combine final documents and other PDF files into a single project manual in PDF format.

To create a new project manual for a project:

- In the Project Details area, click the **Project Manual** button.
- Locate the project in the projects list and **click**  the icon to expand it so the project documents are shown.
- **Select** the **check box** beside the documents to be included in the project manual. As you select the documents, they are added to the Selected Documents list. You can use the small arrow buttons to move documents up or down to arrange them in the order in which you want them to appear in the project manual.
- When you finish selecting documents, **type the name** of the project manual in the “Save Project Manual As” text box and **click OK**.
- A message is displayed that the project manual was generated. The document will appear in the list of your project documents.

Digital signatures

AIA Contract Documents allows you to sign final documents digitally. If you have enabled the digital signature option, a new digital signature placeholder page is inserted in your final document immediately after the written signature block and the notation “see attached digital signatures page” is inserted in the written signature block.

Refer to <http://www.aia.org/contractdocs/AIAS077674> for more information.

Learn more

The AIA Contract Documents Learn page is a comprehensive, user-friendly website that offers design and construction professionals high-quality Contract Documents-related education programs and materials. Users of the site can access live training webinars, on-demand courses, and an extensive library of written resources. Most courses are eligible for continuing education credit from the AIA, as well as other professional organizations. Visit aiacontracts.org/learn

To attend a free, online AIA Contract Documents Online Service Basics webinar [click here](#) and select an available date from the drop-down menu.

Product support

All AIA Contract Documents Support Lines are open Monday–Friday, from 8:30 a.m. to 6:00 p.m. Eastern time.

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