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 AIA Contract Documents 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.

				•
Projects				
			Search Projects	GO
Create New Project	Project Details		Project Manual D	elete Project Edit Project Data
Sort By Modified Date	Project Name			View Project Data 🛦
Solito, Produce Date	Pochis House - Documents			Create Desumant
Pochis House				Create Document Import File
	There are no desuments to display			
	There are no documents to display			NN
				\mathbf{X}
Projects				7700
TUEUIS				
			Search Projects	GO
			Search Projects	60
	Project Details		Search Projects Project Manual D	GO elete Project Edit Project Data
Create New Project	Project Details		Search Projects Project Manual D	GC elete Project Edit Project Data
Create New Project Sort By Modified Date	Project Details Project Name*3		Search Projects Project Manual D	GO elete Project Data View Project Data A
Croate New Project Sort By Modified Date Select Templat	Project Details Project Name**		Search Projects Project Manual D	GC elete Project Data View Project Data ▲ a Document Import File
Croate New Project Sort By Modified Date	Project Details Project Name**		Search Projects Project Manual D	GC elete Project Data View Project Data A view Project Data A
Croate New Project Sort By Modified Date Pothis House Standard	Project Details Project Name** Custom Favorites	Iter by	Search Projects Project Manual D	GO elete Project Data View Project Data A e Document Import File
Create New Project Sort By Modified Date Pochie House Standard	Project Details Project Name*T Custom Favorites F	Iter by	Search Projects Project Manual D	GO elete Project Edit Project Data View Project Data A
Croate New Project Sort By Modified Date Pothis House Standard Template ID	Project Details Project Name** Custom Favorites Fi Template Name	lter by Template Series	Search Projects Project Manual D C C C C C C C C C C C C C	GO elete Project Edit Project Data View Project Data A e Document Import File
Create New Project Sort By Modified Date Pochie House Standard Template ID A101-2007	Project Details Project Name* Custom Favorites Fi Template Name Owner-Contractor Agreement - Stipulated Sum	lter by Template Series A-Series	Search Projects Project Manual Project Manual Coventional Edit Offline	GO elete Project Edit Project Data View Project Data e Document Import File
Creato New Project Sort By Modified Date Pochie House Standard Template ID A101-2007 SP	Project Details Project Name* Custom Favorites Fi Template Name Owner-Contractor Agreement - Stipulated Sum Owner/Contractor Agreement - Subjulated Proj	Iter by Template Series A-Series A-Series	Search Projects Project Manual Project Manual Conventional Edit Offline Conventional Edit Offlin	GO elete Project Edit Project Data View Project Data e Document Import File
Create New Project Sort By Modified Date Pochis House Standard Template ID A101-2007 A101-2007 SP A101-2017	Project Details Project Name* Custom Favorites Fi Custom Favorites Fi Owner-Contractor Agreement - Stipulated Sum Owner/Contractor Agreement - Stipulated Sum Owner/Contractor Agreement - Stipulated Sum	Iter by Template Series A-Series A-Series A-Series A-Series	Search Projects Project Manual Project Manual O Conventional Edit Offline Conventional Edit Offl	GO elete Project Edit Project Data View Project Data A
Create New Project Sort By Modified Date Pochis House Standard Template ID A101-2007 A101-2017 Ex	Project Details Project Name* Custom Favorites Fi Custom Favorites Fi Ovner-Contractor Agreement - Stipulated Sum Ovner/Contractor Agreement - Stipulated Sum Ovner-Contractor Agreement - Stipulated Sum	Iter by Template Series A-Series A-Series A-Series A-Series A-Series	Search Projects Project Manual Project Manual O Conventional Edit Offline Convention	GO eleta Project Edit Project Data View Project Data A e Document Import File
Create New Project Sort By Modified Date Pochis House Standard Template ID A101-2007 A101-2007 A101-2017 Extended to the second	Project Details Project Name* Project Name* Custom Favorites Fi Custom Favorites Fi Ovner-Contractor Agreement - Stipulated Sum Ovner/Contractor Agreement - Cost Plus Fee vi	Iter by	Search Projects Project Manual Project Manual Conventional Edit Offline Conventional Edit Offlin	GO elata Project Data View Project Data A a Document Import File
Create New Project Sort By Modified Date Pochis House Standard Template ID A101-2007 A101-2007 Ex A101-2017 Ex A102-2017	Project Details Project Name* Custom Favorites Fi Custom Favorites Fi Custom Contractor Agreement - Stipulated Sum Owner/Contractor Agreement - Stipulated Sum Owner/Contractor Agreement - Stipulated Sum Owner/Contractor Agreement - Cost Plus Fee wi Owner/Contractor Agreement - Cost Plus Fee wi Owner/Contractor Agreement - Cost Plus Fee wi	Iter by Template Series A-Series A-Series A-Series A-Series A-Series A-Series	Search Projects Project Manual Project Manual Conventional Edit Offline Conventional Conventional Conventional Edit Offline Conventional Conventiona	GO elata Project Data View Project Data A
Create New Project Sort By Modified Date Pochis House Standard Template ID A101-2007 A101-2007 A101-2017 Ex A101-2017 A102-2017 Ex	Project Details Project Name*** Favorites Fill Custom Favorites Fill Custom Favorites Fill Custom Favorites Fill Owner-Contractor Agreement - Stipulated Sum Owner/Contractor Agreement - Sustainable Proj Owner/Contractor Agreement - Sustainable Proj Owner/Contractor Agreement - Cost Plus Fee wi Owner/Contractor Agreement - Cost Plus Fee wi Owner/Contractor Agreement - Cost Plus Fee wi ibit A Owner/Contractor Agreement - Cost Plus Fee wi	Iter by Template Series A-Series A-Series A-Series A-Series A-Series A-Series A-Series	Search Projects Project Manual Project Manual Conventional Edit Offline Conventional Conventiona	GO elete Project Edit Project Data View Project Data A Document Import File

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** popup 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**.

nome Projects remplate Library Contai			
Projects			
		Search P	GO
Create New Project Sort By Modified Date + Pochis House	Project Details Project Name** Pochis House - Documents There are no documents to display		rroject Manual Delete Project Edit Project Data View Project Data
Projects			
Projects		Search P	rojects GO
Projects	Project Details	Search P	rojects GO
Projects Create New Project	Project Details	Search P	rojects GO roject Manual Delete Project Edit Project Data View Project Data
Projects Create New Project Sort By Modified Date Pochis House Select Template	Project Details Project Name**	Search P	rojects GO roject Manual Delete Project Edit Project Data View Project Data View Project Data
Projects Create New Project Sort By Modified Date Pochis House Standard Standard	Project Details Project Name** Custom Favorites Fil	Search P F	rojects GO roject Manual Delete Project Edit Project Data View Project Data & CO
Projects Creats New Project Sort By Modified Date Pochis House Select Template Standard Template ID	Project Details Project Name* Custom Favorites Fil Template Name	Search P F Iter by Template Template Series Family	rojects GO roject Manual Delete Project Edit Project Data Vew Project Data A Vew Project Data A CO CO
Projects Create New Project Sort By Modified Date Podchis House Select Template Standard Template ID A101-2007	Project Details Project Name* Custom Favorites Fil Template Name Ovner-Contractor Agreement - Stipulated Sum	Search P F Iter by Template Series A-Series Conventional	ojects GO roject Manual Delete Project Edit Project Data View Project Data A view Project Data A view Project Data A CO Edit Offline
Projects Create New Project Sort By Modified Date Potchis House Select Template Standard Template ID A101-2007 SP	Project Details Project Name* Custom Favorites Fil Template Name Owner-Contractor Agreement - Stipulated Sum Owner/Contractor Agreement - Sustainable Proj	Search P F Iter by Template Series A-Series Conventional A-Series Conventional	ojects GO roject Manual Delete Project Edit Project Data View Project Data view Project Data Co Edit Offline E fine
Projects Create New Project Sort By Modified Date Potchis House Select Template Standard Template ID A101-2007 SP A101-2007 SP A101-2017	Project Details Project Name* Custom Favorites Fil Template Name Owner-Contractor Agreement - Stipulated Sum Owner/Contractor Agreement - Stipulated Sum Owner/Contractor Agreement - Stipulated Sum Owner-Contractor Agreement - Stipulated Sum	Search P F Search P Template Template Series Family A-Series Conventional A-Series Conventional A-Series Conventional	ojects GO roject Manual Delete Project Edit Project Data Vew Project Data A
Projects Create New Project Sort By Modified Date Pochis House Standard Template ID A101-2007 SP A101-2017 Exhi	Project Details Project Name* Custom Favorites Fil Custom Favorites Fil Comer/Contractor Agreement - Stipulated Sum Owner/Contractor Agreement - Stipulated Sum Owner/Contractor Agreement - Stipulated Sum Owner/Contractor Agreement - Stipulated Sum Other A Owner/Contractor Agreement	Search P F Series A-Series A-Series A-Series Conventional A-Series Conventional A-Series Conventional A-Series Conventional A-Series Conventional	ojects GO roject Manual Delete Project Edit Project Data Vew Project Data A vew Project Data A CO Edit Offine Edit Offine
Projects Create New Project Sort By Modified Date Pochis House Standard Template ID A101-2007 A101-2017 Exhi A102-2007	Project Details Project Name* Custom Favorites Fil Custom Favorites Fil Custom Contractor Agreement - Stipulated Sum Owner/Contractor Agreement - Ocus Plus Fee wi	Search P Search P Iter by Template Template A-Series Conventional A-Series Conventional A-Series Conventional A-Series Conventional	ojects GO roject Manual Delete Project Edit Project Data View Project Data A
Projects Create New Project Sort By Modified Date Pochis House Standard Template ID A101-2007 A101-2017 Exhi A102-2007 A102-2017 Exhi A102-20	Project Details Project Name* Custom Favorites Fil Custom Favorites Fil Owner/Contractor Agreement - Stipulated Sum Owner/Contractor Agreement - Stipulated Sum Owner/Contractor Agreement - Stipulated Sum Owner/Contractor Agreement - Out Plus Fee wl Owner/Contractor Agreement - Cost Plus Fee wl Owner/Contractor Agreement - Cost Plus Fee wl	Search P Search P Iter by Template Series Conventional A-Series Conventional Co	ojects CO roject Manual Delete Project Edit Project Data Wew Project Data & CO CO CO CO

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.**

AIA Contract Documents

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.

Home Projects Template Library Co	ontacts			•			
Projects				1010			
			Search Projects	GO			
	Project Details		Project Manual Delete Project	Edit Project Data			
Create New Project Sort By Modified Date	Project Name* Pochis House			View Project Data			
Pochis House	Detailed Description	Last Modified Date 05/15/2017 1:27 PM	Construction Contract / IPD Date	•			
		Project Numbers Architect	Owner-Architect or International C Consultant Agreement Date	Client-			
		Contractor	Type of Contract				
	Project Location	Owner	Contract Cost Structure				
	Project Type Residential- Multi-family		Original Contract Sum				
	Project Team Distribution List						
	Click 'Edit Project Data' to add to Project Team						
	Pochis House - Documents		Create Docum	nent Import File			
				lh-			
	There are no documents to display			6.1			
2017 The American Institute of Architecte							
		Project Numbers	Owner-Architect or International C	Client-			
		Architect	Consultant Agreement Date				
	Project Location		General Construction				
	Project	Owner	Contract Cost Structure Contract Sum				
	Resid	×	onginal contract cont				
	Choose File no file selected						
	c	OK Cancel					
		d 'M	_				
	Pochis House - Documents		Create Docum	nent Import File			
	There are no documents to display						

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 finalize your document.

Home Projects Template Library Con	ntacts			?	
Projects					
		Sea	rch Projects	GO	
		Project saved successfully			
Create New Project	Project Details		Project Manual Delete Project	Edit Project Data	
Son by Modified Date	Project Name* Pochis House			View Project Data	
- 🔝 Pochis House	Detailed Description	Last Modified Date 05/16/2017 11:43 AM	Construction Contract / IPD Date	•	
		Project Numbers Architect Cynthla Cortes	Owner-Architect or International C Consultant Agreement Date	lient-	
	Project Location	Contractor Nelson Cortes Rodriguez	Type of Contract General Construction		
		Owner Silvia di Lena de Cortes	Contract Cost Structure Contract Sum		
	Project Type Residential- Multi-family		Original Contract Sum		
	Project Team Distribution List				
	Click 'Edit Project Data' to add to Project Team				
	Pochis House - Documents		Create Docum	ent Import File	
	Document ID Type Document Nam	ne Comment	Rename	v	
	A101-2017 🖷 A101-2017 - Wo	Orking Draft - 001-draft Customize as	Template Move	More Actions	
	A101-2017 🗐 A101-2017 - Wo	orking Draft - 001-draft Review Status Download	Delete Email	More Actions	
		Check Variance	Print	bus Next >>	
			'n		
2017 The American Institute of Architects		P .			

AIA Contract Documents

Step 5 – Finalize

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

Home Projects Template L	ibrary Cor	itacts						?
Projects								
					Se	arch Projects		GO
		Project Detail	s			Project Manual Delete P	roject E	dit Project Data
Create New Project Sort By Modified Date	\$	Project Name* Pochis House					Vi	ew Project Data 🛦
		Pochis House - Documents			Create	e Document	Import File	
Pochis House								
		Document ID	Туре	Document Name	Status	▼ Last Modified		
		A101-2017		A101-2017 - Working Draft - 001-draft	Draft	05/16/2017 12:05 PM F	inalize	More Actions
		A101-2017		A101-2017 - Working Draft - 001-draft	Draft	05/16/2017 12:05 PM	Ih	More Actions
		A101-2017		A101-2017 - Working Draft - 001-draft	Draft	05/16/2017 11:54 AM	ויין	More Actions
		A101-2017		A101-2017 - Checked Draft - 001-draft(1)	Draft	05/16/2017 11:48 AM		More Actions
		A101-2017	۲.	A101-2017 - Working Draft - 001-draft	Draft	05/16/2017 11:41 AM	inalize	More Actions

Additional Resources

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

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 >