

# 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:

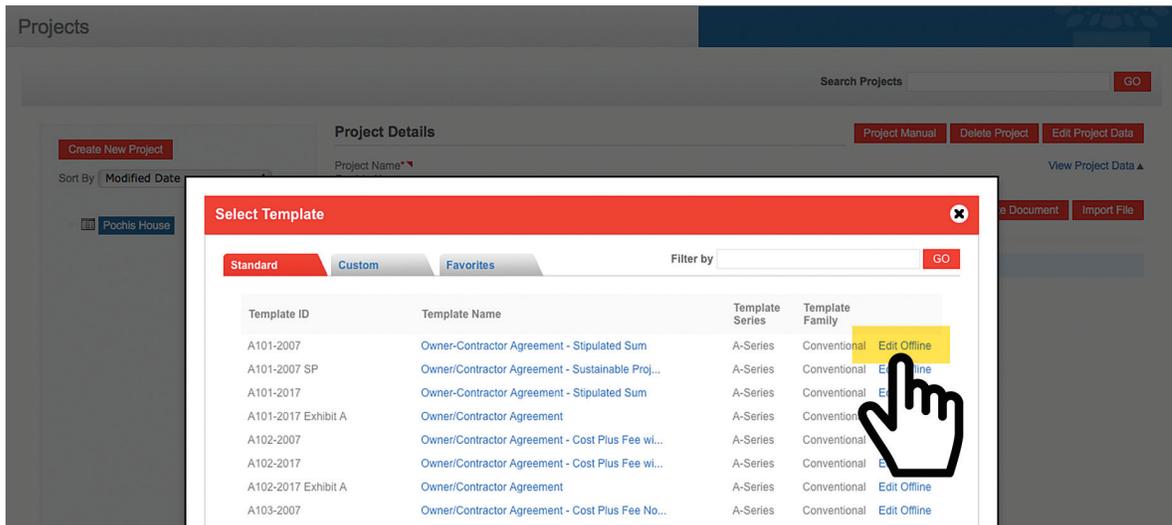
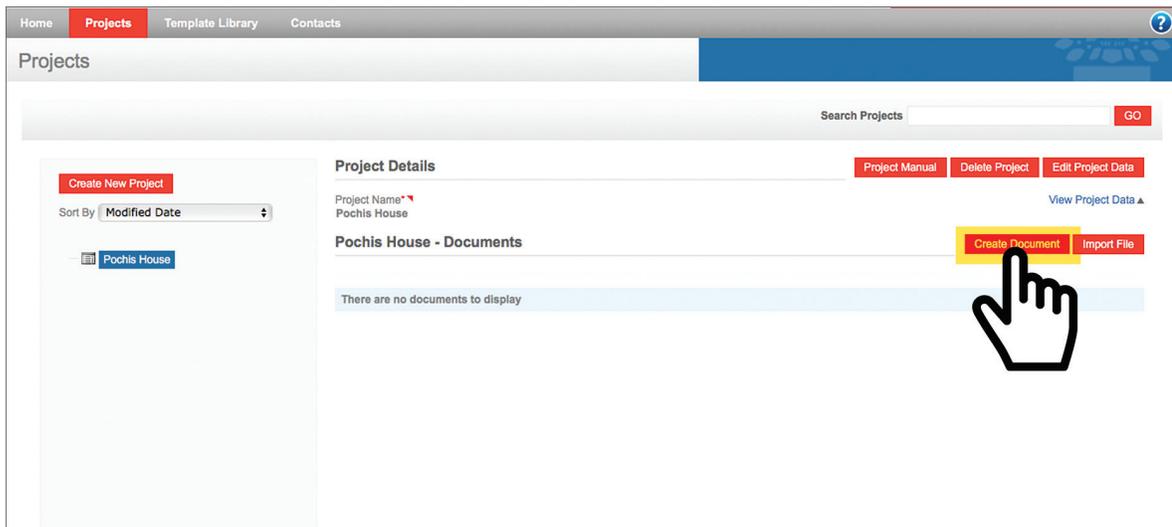
- Online Editor is a lite web browser-based editor, which does not provide all the available features which Word offers and you are custom to
- Print Preview is only in PDF format
- Creating tables and adding rows and columns are not as robust and not as user - friendly as Word
- For security reasons, 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

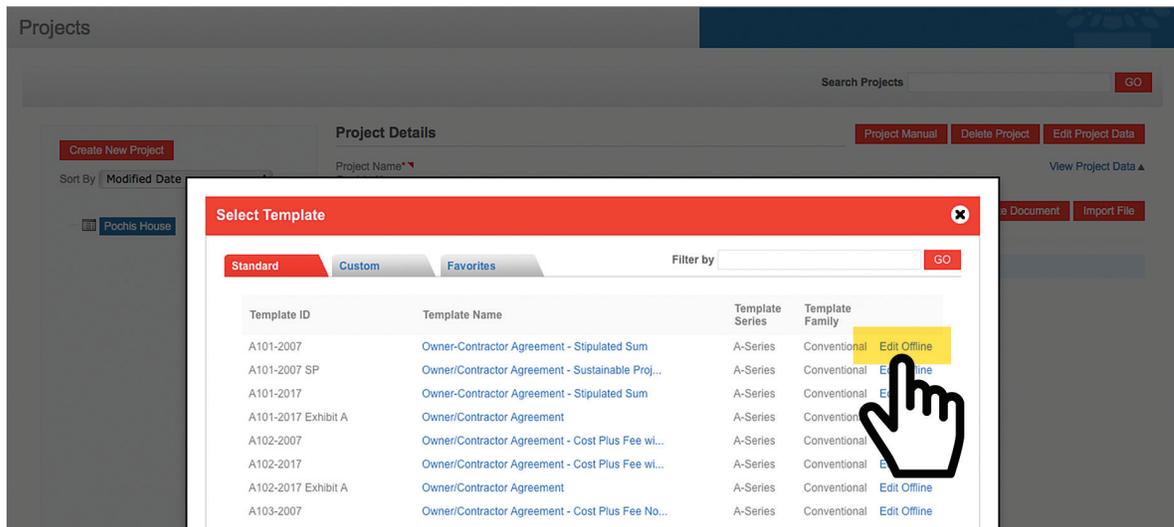
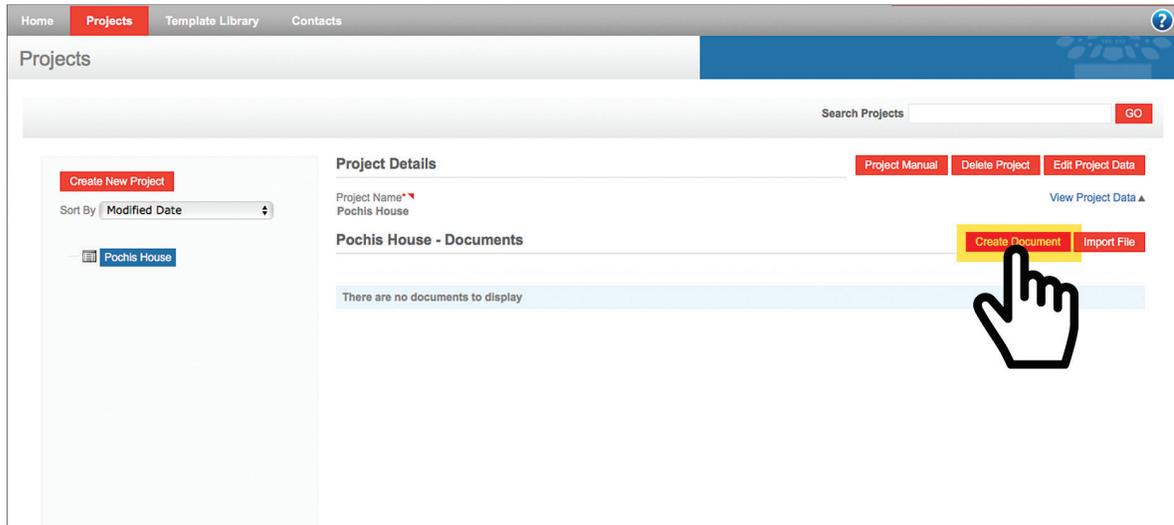
At the top of the menu, click on **Template Library** and then click on **More Action** next to the document you would like to work on. Select **Edit Offline** as shown below and this will download your document to your computer.



# AIA Contract Documents

## 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 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.

The screenshot displays the 'Projects' interface. On the left, there is a sidebar with a 'Create New Project' button and a 'Sort By' dropdown set to 'Modified Date'. Below this is a list of projects, with 'Pochis House' selected. The main area shows 'Project Details' for 'Pochis House', including fields for Project Name, Detailed Description, Last Modified Date (05/15/2017 1:27 PM), Project Numbers (Architect), Contractor, Owner, Project Location, Project Type (Residential- Multi-family), Construction Contract / IPD Date, Owner-Architect or International Client-Consultant Agreement Date, Type of Contract (General Construction), Contract Cost Structure, Contract Sum, and Original Contract Sum. At the bottom right of the project details, there are buttons for 'Create Document' and 'Import File'. A hand cursor is pointing at the 'Import File' button. Below this, an 'Import File' dialog box is open, showing a 'Choose File' button, the text 'no file selected', and 'OK' and 'Cancel' buttons. A hand cursor is pointing at the 'OK' button. The footer of the page reads '© 2017 The American Institute of Architects'.

## 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.

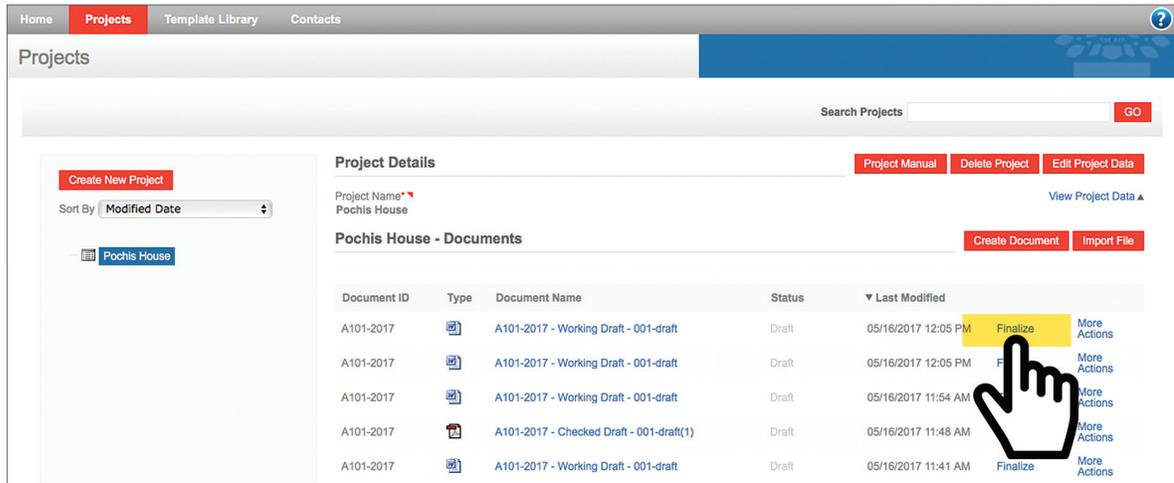
The screenshot displays the AIA software interface for project management. At the top, there are navigation tabs for Home, Projects, Template Library, and Contacts. The main header shows 'Projects' and a search bar. A green notification bar at the top center states 'Project saved successfully'. Below this, the 'Project Details' section for 'Pochis House' is visible, including fields for Project Name, Last Modified Date, Project Numbers, Contractor, Owner, and various contract-related fields. A 'Project Team' section is also present. The bottom section, 'Pochis House - Documents', contains a table with two entries, each with a 'More Actions' dropdown menu. The 'Check Variances' option is highlighted in yellow in the dropdown menu for the second document entry. A hand cursor icon points to this option. The footer of the page reads '© 2017 The American Institute of Architects'.

Document ID	Type	Document Name	More Actions
A101-2017		A101-2017 - Working Draft - 001-draft	Comment, Customize as Template, Share for Review, Review Status, Download, Check Variances
A101-2017		A101-2017 - Working Draft - 001-draft	Rename, Move, Copy, Delete, Email, Print, More Actions

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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.



The screenshot shows the 'Projects' section of the software. On the left, there is a sidebar with 'Create New Project' and a search bar for 'Pochis House'. The main area displays 'Project Details' for 'Pochis House' and a table of documents. A hand cursor is pointing to the 'Finalize' button in the 'More Actions' column for the first document in the table.

Document ID	Type	Document Name	Status	Last Modified	More Actions
A101-2017		A101-2017 - Working Draft - 001-draft	Draft	05/16/2017 12:05 PM	Finalize More Actions
A101-2017		A101-2017 - Working Draft - 001-draft	Draft	05/16/2017 12:05 PM	Finalize 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

## 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 >](#)

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