Beginner's Guide

Online Service for Single-Users

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

AIA Contract Documents

Beginner's Guide to AIA Contract Documents

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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.
- The latest version of one of these web browsers: Internet Explorer, Safari, Chrome, Firefox, or Edge
- Adobe Acrobat Reader 9 or higher
- If choosing to edit offline, a current version of Microsoft® Office: 2010, 2013 or 2016
- The AIA Document Mover requires Microsoft® Net Framework version 4.5

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 on the Home tab to download the migration utility setup file. 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.

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.
- 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.

QUICK TIP 1

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.

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 in order 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 of the screen.
- 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.
- ClickOK. 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:

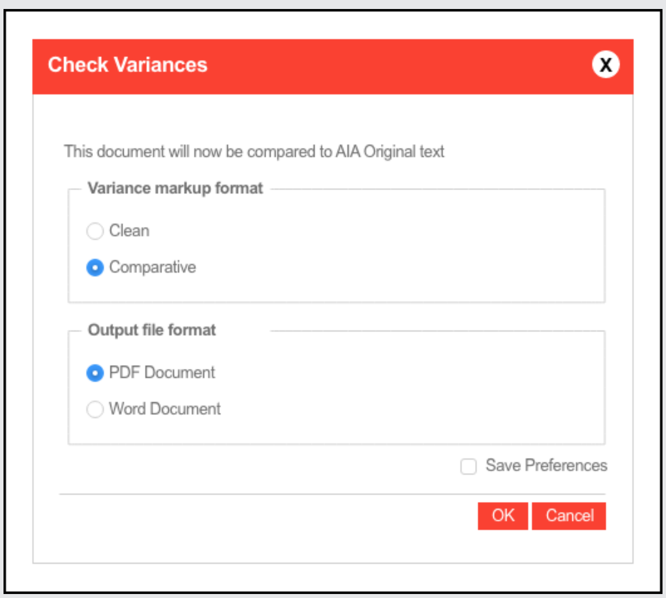
- From the Project Details area by clicking the Check Variances link for the desired document.
- From the within the document in the Online Editor by clicking the Check Variances button on the sidebar.
- The Check Variance dialog opens.
- Select the Variance Markup Format:

  – **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.

QUICK TIP 2



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.

– **Word:** The document is generated in Word in DOCX format and is a working draft that you can continue to edit.

– **Online**: The variance-checked document will be opened in the Online Editor.

- Click OK.

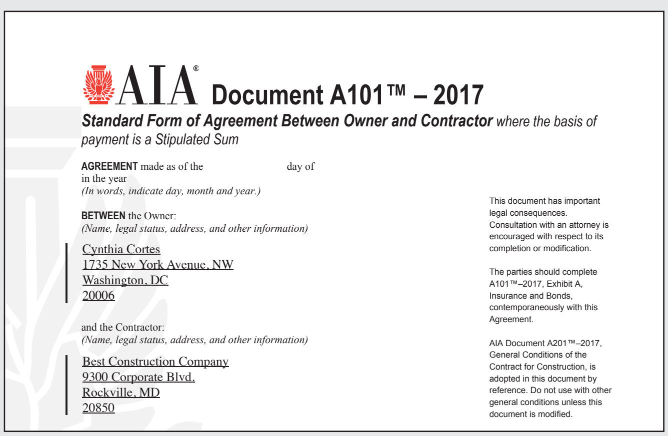
Finalize a document

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.
- 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.

QUICK TIP 3


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.

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 as appended with a PDF formatted variance checked copy of the Author's draft.

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

QUICK TIP 4

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**.

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 smal 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 you 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.

Technical Support
Telephone: (800) 942-7732
Fax: (202) 879-3083
Email: docstechsupport@aia.org

Content Support
Telephone: (202) 626-7526
Email: docinfo@aia.org

Education Contact for Inquiries
Telephone: (202) 626-7592
Email: aiadocsed@aia.org