

Beginner's Guide to AIA Contract Documents Software

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

AIA Contract Documents®
THE INDUSTRY STANDARD.

Beginner's Guide to AIA Contract Documents Software

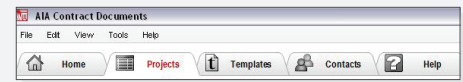
Welcome to AIA Contract Documents. The beginner's guide will help you get started with a quick overview of Contract Documents software, and show you step-by-step how to create, edit, share and manage contract documents. Also included are all the resources you need to navigate your way successfully through the software.

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Getting Started

AIA Contract Documents software provides more than 160 Microsoft Office-based documents and makes it easy to create, edit, share and finalize your documents and forms. Five tabs organize the software; the **Home** tab includes recent projects and documents; the **Projects** tab provides access to all your projects; the **Templates** tab stores all of the AIA Contract Documents templates; the **Contacts** tab saves all firms and representatives from past projects; and the **Help** tab offers additional resources (*example 1.1*).



1.1 Five Tabs

Creating a Project

AIA Contract Documents software is project-centric; this means that information and documents are created and stored by project. Before creating a document, you must first create a project.

When creating a project, you will be prompted for certain project information such as the project description and project names. Once entered, the project information will be stored and thereafter automatically entered into all documents that you generate for that project.

There are three ways to create a new project:

- Click **Create A Project** on the home page
- Open the **Projects** tab and click the **New Projects** button on the Navigation pane
- Select **File > New > Project** at the top of the toolbar.

You will then be prompted to enter relevant information into the **New Project** window (*example 1.2*).

You must name your project for it to be saved.

"Project Name" refers to the name of the folder and "Project List Name" refers to how it will appear in your projects listing.

You can rename your project at any time by selecting the project and clicking **Edit Project Data** on the right-hand pane of the **Projects** tab.

You can also select project team members through this window when creating a new project. This information will then automatically generate when you create a new document for that project. You will be prompted to select project team members from a listing of contacts that you previously added in the **Contacts** tab.

A screenshot of the "New Project" window in the AIA Contract Documents software. The window has a title bar that says "New Project". Below the title bar is a tabbed interface with three tabs: "Basic Information", "Contract Details", and "Project Team". The "Basic Information" tab is currently selected. The window contains several text input fields: "Project Name:", "Project List Name:", "Project Detailed Description:", "Architect's Project Number:", "Contractor's Project Number:", "Owner's Project Number:", and "Project Location:". Each field has a small question mark icon to its right. At the bottom right of the window are "OK" and "Cancel" buttons.

1.2 New Project Window

Editing a Project

Editing the information displayed on the **Project Data** sub-tab is easy. Either click the **Edit Project Data** button on the navigation pane or right-click the currently selected (highlighted) project in the project list, and then select the **Edit Project** option in the right-click menu.

Finding Recently Used Documents

QUICK TIP

To begin, it is important to find the right document for the task at hand. The top left corner has your three most recently accessed projects, and within those, the three most recently accessed documents. So if you have already created a project and just need to return to this project, you can just pick up where you left off.

Creating a Document

AIA Contract Documents software helps you generate working contract documents effortlessly and efficiently.

To create a draft document for a specific project:

1. Once you have created a new project, click the **New Document** button on the navigation pane.
2. Then choose a **Document Template**. The document templates are grouped by series and family and can be filtered.

The Data Dialog

When you first open a draft document, the Data Dialog opens automatically alongside your document. The Data Dialog enables you to see, scroll through and fill in all the data entry fields in a consolidated form that is separate from your document.

You can close the Data Dialog by clicking the **Close** button at the bottom of the dialog form, or by clicking on the red close button at the top right of the dialog form. You can then re-open the Data Dialog by clicking on the **Data Dialog** button in the Add-Ins Toolbar. (example 2.1)



2.1 Add-Ins Toolbar

Using the Data Dialog

You can work interactively with both the draft document and the Data Dialog, switching back and forth as desired.

Within the Data Dialog, you can tab between fields and enter new data or edit existing data in any field. When you do this, the draft document scrolls automatically to show you the corresponding field within the document. As you tab out of each field in the Data Dialog, the document is updated automatically with the data entered in the Data Dialog. (example 2.2)

Alternatively, if you chose to edit a data field directly within the draft document, then this edited data is automatically updated into the corresponding field in the Data Dialog when you reopen it. In order for this feature to work correctly, it is important for you not to delete the chevron symbols (< >) for that field in the draft document.

You can, however, choose to delete complete data fields, or paragraphs of text containing data fields, from the draft document. In this case, when you go back into the Data Dialog the deleted fields will be greyed-out and you will not be able to click the cursor into these fields.

A screenshot of the 'A101-2007 SP' Data Dialog window. The window has a title bar 'A101-2007 SP' and a close button. The main area is titled 'Data Dialog' and 'AIA Contract Documents'. Below this, it says 'A101-2007 SP' and 'Document Instructions...'. The description reads: 'Standard Form of Agreement Between Owner and Contractor, for use on a Sustainable Project where the basis of payment is a Stipulated Sum'. There are three tabs: 'Project Data', 'Project Team', and 'Document Specific Data'. The 'Project Data' tab is active. It contains several fields: 'Project Name' (Bank of Texas Headquarters), 'Project Location' (399 Park Ave), 'Detailed Description of Project' (Austin, TX 78753, (512) 670-4920), and 'Construction Contract / IPD Date' (Day: 19, Month: November, Year: 2012). Each field has a red double-headed arrow icon and a question mark icon. At the bottom are 'Close' and 'Minimize' buttons.

2.2 Data Dialog

Variance Checker

A handy Variance Checker built into the software allows you to check a draft document against the original AIA master document. The Variance Checker will also note any differences by generating a third document, called the Additions and Deletions Report.

The Variance Checker works only after you have made edits to the document. 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 to the original AIA master document text.

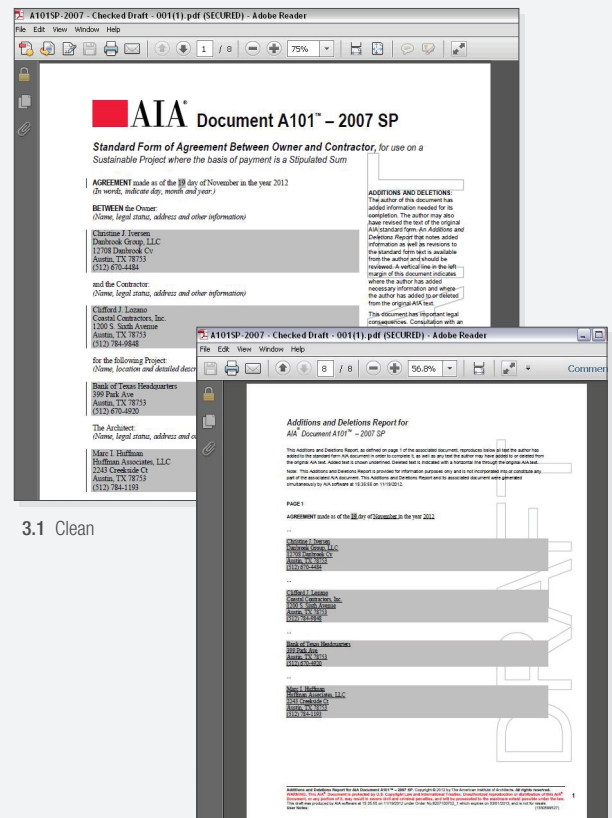
You may variance check your draft document at any time.

To variance check a document, select the document you want to check in the **Documents** sub-tab of the corresponding project, and then click the **Check Variances** button on the navigation pane. The **Variance Check Settings** window opens.

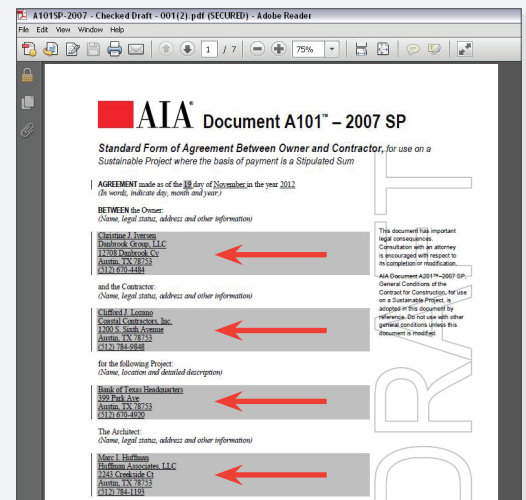
You can check the document in one of two modes:

- **Clean** — (example 3.1) The additions to and deletions from the document are indicated in the margin, parallel to where the changes occur. The details of the changes are appended to the document in an Additions and Deletions Report (with page references). This document is called a Checked Draft and is a locked PDF file.
- **Comparative** — (example 3.2) All changes are noted in-line in the document, marking additions with underlining and deletions with strike-throughs.

The Variance Checker will run automatically in a locked PDF attached to your contract when you generate a final document.



3.1 Clean



3.2 Comparative

Sharing a Document

When you save a document in the software it will add a default title. You can rename your draft by right-clicking on the document title. You may need to get feedback from clients and colleagues on your drafts before generating a final version of a document. You can either print or e-mail the draft documents to relevant parties. Before sending a document for review via e-mail, you can select one of the three collaboration formats available for a draft document (see Quick Tip below). Finally, you can import a draft document back into the software for further editing, finalization or additional collaboration.

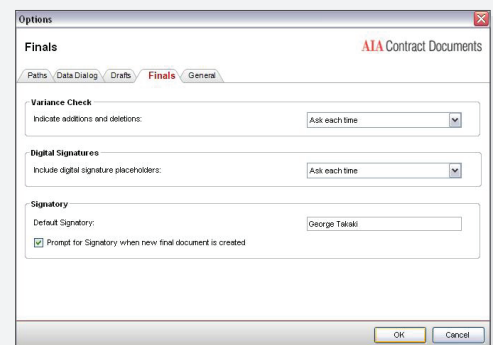
Digital Signatures

By enabling a feature in the software, you can have the choice of a written or digital signature.

If you go with the digital signature option, you will need to purchase a digital signature from a third party first, and have access to Adobe Professional or other digital signing software.

To enable digital signatures in your software, go to **Tools** and then **Options** and then to **Finals** (example 4.1).

To find out more information about using digital signatures, go to www.aia.org/docs_usingdigsig.



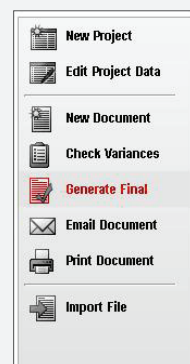
4.1 Digital Signature

Finalizing a Document

When collaboration and checking are complete, a final document can be generated. The final document will always be a read-only PDF and can be viewed and printed in Adobe Reader®.

To generate a final document:

1. Select the draft document or form draft on the **Documents** sub-tab, and then click the **Generate Final** button on the navigation pane (example 4.2).
2. For draft documents, the **Variance Check Settings** window opens. Form Drafts are not variance checked.



4.2 Generating a Final Document

When e-mailing a Draft document to other parties for collaboration, you can e-mail most documents in one of three ways:

QUICK TIP

- 1 Send Draft documents with track changes turned off, for completely free editing by the recipient
- 2 Send the document with track changes locked on to show all future edits
- 3 Send a PDF version (thereby preventing any editing)

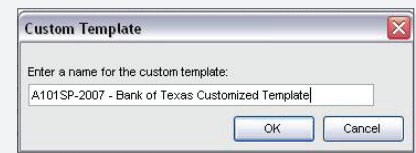
Creating a Custom Template

AIA Contract Documents software enables you to customize and save document templates with your standard edits, and then use these customized templates as the basis for your draft documents.

On most documents, you can create your own custom template by changing the text either in an existing template or in a draft document and then saving the edited document for re-use in future projects.

To create a custom template from a standard template:

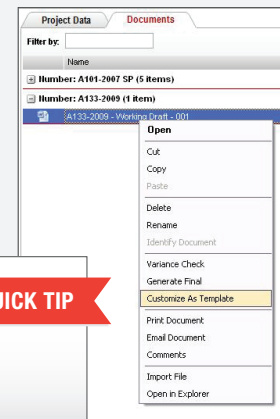
1. Click the **Templates** tab and select the name of the template you want to customize
2. Click the **Customize Template** button in the navigation pane
3. Enter a name for the template in the window that displays or leave default name unchanged and click OK (*example 5.1*)
4. Click OK in the **Template Warning** box that appears



5.1 Naming a Custom Template

You can also create a custom template from a draft:

1. Click the **Projects** tab and select the project containing the document you wish to use as a template.
2. Right-click on the required draft document in the **Documents** sub-tab and select the **Customize As Template** option
3. Enter a name for the template in the window that displays or leave default name unchanged and click OK
4. Click OK in the **Template Warning** box that appears



The quickest way to create a custom template is to:

QUICK TIP

- | | | | | | | | |
|----------|------------------------|----------|-----------------------------------|----------|-------------|----------|------------------------------|
| 1 | Go to the Projects tab | 2 | Select a specific draft agreement | 3 | Right click | 4 | Select Customize As Template |
|----------|------------------------|----------|-----------------------------------|----------|-------------|----------|------------------------------|

The chosen template or draft document will be opened in Word, with all pre-existing project data removed from the fill points. You can now make edits for the task at hand. After you have completed your editing, simply use the normal Word functions to save your changes.

To generate a draft document based on a custom template, click **New Document** on the navigation pane and select the **Custom** tab when prompted.

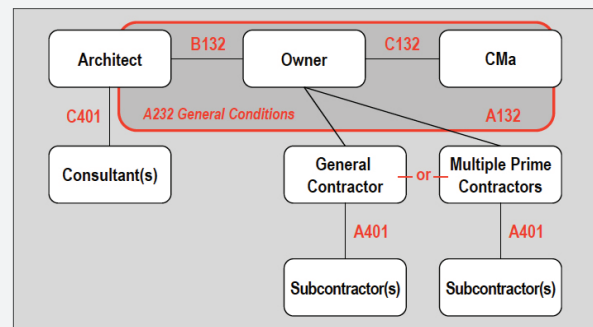
To make additional edits to your custom template, click the **Edit Template** button on the **Navigation Pane**.

The new Custom Template will be saved on the **Custom** sub-tab.

Learning More

The AIA Contract Documents Education Portal is a comprehensive, user-friendly web site that offers the design and construction industry and other professionals high-quality Contract Documents-related education programs and materials in one convenient online location. Users of the site can access live training webinars, podcasts, 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 www.aia.org/docuaction to view:

- **Reference Materials** - Take advantage of AIA's reference materials and find out more about document synopses, amendments and supplementary conditions, articles, commentaries and comparisons, and current documents and availability at www.aia.org/contractdocs/reference.
- **Knowledge Base (FAQ)** - AIA Contract Documents Knowledge Base (FAQ) answers some 500 questions about purchasing documents, using AIA Contract Documents software, and selecting and understanding AIA contracts and administrative forms. Please click [here](#) to access the Knowledge Base (FAQ).
- **Free Guides** - Free guides are available to Contract Documents license holders. Find out more [here](#).
- **Contractual Relationship Diagrams** - Explore how contractual relationships work across different construction project delivery models (*example 6.1*) and learn which contracts to use for each [here](#).
- **Additional Software-Specific Resources Include:**
 - Top 10 Features of AIA Contract Documents Software
 - Introduction to AIA Contract Documents software
 - Contract Documents Software training tutorial
 - And much more



6.1 Contractual Relationship Diagrams

Keeping Your Software Updated

As AIA Contract Documents are updated and new documents are issued on a regular basis, it is important to update your software frequently. As a software license holder, you will periodically receive an email or alert when there is a new software release.

You can verify the latest updates by using the **Check For Free Update** link found on the software home tab (located under Your Software License.) You can also determine the software version you are currently using [here](#). Lastly, you can visit www.aia.org/contractdocs/softwareupdates to update your license.

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

E-mail: docstechsupport@aia.org

Access technical support in AIA Contract Documents® software by clicking the **Help** tab and then clicking the **E-mail Software Support** icon (*example 7.1*). E-mail requests for support are addressed within 4 business hours.

Content support

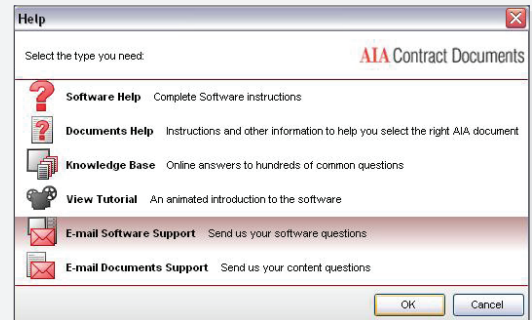
Telephone: (202) 626-7526

E-mail: docinfo@aia.org

Education contact for inquiries

Telephone: (202) 626-7592

E-mail: aiadocsed@aia.org



7.1 E-mail Software Support in the Help Tab