PREPARING CONTRACTS IS ABOUT TO GET

A LOT EASIER

The New AIA Contract Documents Software Delivers PDF and Word Convenience, as it Unveils a Fully-Redesigned Application

By Evan Schuman

BOSTON — In August, Edward Tsoi, FAIA, was finalizing a contract on a four-month $35 million architecture project for the Boston Medical Center.

The Tsoi/Kobus & Associates co-founder was fuming about how software problems were making a complex nego-tiation even more complicated.

"It takes so very much time and energy just to understand what the other side of the table really wants," he said. "And it is so hard to follow when the inserts and changes are essentially 20 pages stapled to the back."

Having to re-key each of these changes into the software in order to draft a workable contract is a paperwork challenge Tsoi's staff would rather do without. But as architects, attorneys, contractors, and building owners know only too well, Tsoi's struggles are hardly unique.

Word, PDF Integration

The American Institute of Architects (AIA) has unveiled an entirely new software platform for delivering its industry-standard AIA Contract Documents application. In a radical departure from the software's history, the new AIA Contract Documents software is abandoning its internally-developed word processor and announcing a tight integration with Microsoft® Word as well as the ability to create documents securely as PDFs.

But the changes are promising to fundamentally change the way documents are crafted, especially when it comes to collaboration and time spent on filling out forms versus

NEW AIA Contract Documents Software
Product Highlights

CREATING AND EDITING
- Dialog boxes ask questions. Answers automatically fill in blanks in the document, are stored for future use
- Microsoft® Word editing, track changes functionality
- Customized document templates

COLLABORATING
- E-mailed documents as Word or PDF attachments
- Track changes made by the other parties on the project team
- Variance Check that compares draft document against AIA standard language to note any differences
- Collaborate with anyone who can view Word or PDF documents

GENERATING OR PRINTING A FINAL
- "Clean copy" documents without strike-throughs or underlines
- "Additions and Deletions" report reflects variations from standard AIA language and included at the end of the document
- "Comparative" final document marks variances in place

STORING AND RETRIEVING
- Store, share documents on network
- Call up project data, automatically incorporate into new documents
- Create PDFs of contracts created in EF 3.0 PLUS

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helping shape the built environment.

Christopher Smith, AIA, is area director of Design/Construction for Ernst & Young and oversees a large volume of outsourced projects for the financial services giant. Compared with the prior industry-standard software, he sees the new package as a vast improvement. "This new one is so far superior that you can really concentrate on what the work is rather than battle the software," Smith said.

Even the downloading of the software has been made much easier, with nothing more than a few clicks from www.aia.org required.

The AIA's development efforts have been a major priority for the organization. "Our current software users told us what they wanted and we listened. We're confident that this new software will save time, enhance collaboration, and help streamline contract negotiations," said Norman L. Koonce, FAIA, who serves as the organization's Executive VP and CEO.

Focusing On Substance

The new software offers users several ways to track changes, including an Additions and Deletions Report that logs every change made to the original AIA contract language, regardless of whether the track change option is turned off or not. "Those options offer so much versatility in how you control the process," said beta tester Bill Klorman, president of Klorman Construction in Los Angeles.

The program also boasts a spreadsheet capability that is similar to Microsoft Excel, but it hides the confusing calculation formulas, said Suzanne Harness, AIA, an attorney who serves as managing director of the AIA Contract Documents program. "The software provides a dialog box that asks the user a series of questions and then does the math invisibly. Also, preparing a payment application is now faster than ever because the two required forms are linked, a timesaver for contractors."

Easier to Use Than Word Itself

Some early users of the product point out that the software doesn't merely support Word, but that its ease-of-use and interoperability features are superior to Word.

"It's Word, but better than Word," Klorman said. "The working interface is very comfortable. The desktop and toolbars were certainly very well thought-out."

Barbara Heller, FAIA, of Washington, D.C. architecture firm Heller & Metzger, said she found the software quite user-friendly. "Using Word on your own and navigating all of the formatting options can be difficult for some people," she said. "This new AIA software does it for you."

Heller said her favorite features were the Additions and Deletions Report and being able to produce a clean copy document. "Because the Additions and Deletions Report will show each change to the original document, we can now make clean copies without strike-throughs and underlines."

One of the new application's features is the ability to track revisions by multiple collaborators in a way that is intuitive and yet doesn't interrupt or distract the reader. Tsoi said his Boston Medical Center project could have really used that feature. "The ability to track the changes by the authors and have that be totally visible to every person who touches it is fantastic," Tsoi said. "With ten people negotiating this deal, you can imagine how difficult it is to keep track of who said what about what portion."

Documents overflowing with revision marks — especially when those documents are scanned, copied and even faxed — can make it easy to overlook key changes hiding in a sea of minutia.

Another business advantage can be found when architects and attorneys are freed from manually tracking minute changes and can focus more on substantive elements, such as defining scope and writing detailed architectural descriptions, said veteran Yale University Lecturer Philip Bernstein, FAIA.

"I think a firm that is using the new soft-

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> *– Barbara Heller, FAIA, Heller & Metzger*

ware is at a distinct competitive advantage," said Bernstein, who has taught students at Yale's School of Architecture for 16 years.

The strongest element of that advantage is that the software now supports much greater collaboration. The fact that the files can be easily e-mailed to — and opened and edited by — anyone with a version of Microsoft Word is essential to accelerating the negotiation process, Klorman said. This sharply reduces the need for lengthy conference calls and allows for contract changes to be dealt with much more efficiently.

Self-Completing Documents

The software provides dialogs that prompt users to enter project and document-specific information, which automatically feeds into any document created for the project.

Tsoi/Kobus's Tsoi was quite impressed with that feature. "You just pull up a standard form and it's almost completely filled out for you," Tsoi said. "Those who struggle daily when filling out these forms are going to love it."

Heller agreed: "The ability to produce documents is an order of magnitude faster. Architects can now knock out a typical owner-architect agreement in one-third the time."

The dialog information may also be stored for use on future projects. That means that a form can not only complete itself on the current project, but it will do so on each and every subsequent project for that client or others, at the option of the user.

Integrated Custom Templates

Robert Middlebrooks, AIA, a beta user and a vice president with Norfolk, Va., -based Clark Nexsen, gave his vote for favorite new feature to the custom templates. This feature allows users to customize contracts—including adding favorite language or requirements that are unique to a particular project—and save them for future use.

"It's great to be able to put templates together, save them, use them at whatever level you want to take them to, share that document, and not have to duplicate things you've done in the past," Middlebrooks said. "And you also do not have to worry about whether you've incorporated all the odd clauses that you might need to incorporate because you can embed them in the custom templates."

With the new AIA Contract Documents software, a wide range of new capabilities — from improved ease-of-use, superior collaboration and an intuitive software design — combine to offer the construction industry an infinitely better way to conduct business. ■