

Catina Onboarding

Welcome! This document will guide you through the Catina onboarding process. We're here to support you every step of the way, providing a recommended path, outlining what you can expect now and, in the future, and detailing the support you can anticipate from us.

Phase I – New Account Access and Migration

1. **Log in** to [Catina](#) with your existing ACD5 credentials. If you have a multiseat account, please have all users log in to confirm their access to Catina.
 - We also recommend taking a moment to log into ACD5 to ensure you still have access. A courtesy extension has been granted to provide additional time for the migration, to finish any open projects, and to attend Catina training. If you have a multiseat account, please have all users log in to confirm their access to ACD5
2. **Upon renewal**, your account migration will be triggered from ACD5 to Catina. It is an overnight process, so you will see your finalized documents the following day.
3. **What You Will See** (Day After Renewal):
 - All finalized documents from ACD5, including project details, will be migrated to Catina.
 - Project teams, distribution lists, and global contacts will be imported into the Address Book.
 - Duplicate entries are avoided; only the most recent record with the same email will be imported.

What You Won't See:

 - Project folders and unfinalized or in-flight documents will not be available within Catina at this time- the product team is working hard to develop this functionality at a future release.
 - Your custom templates – however you have the ability initiate the migration of your custom templates with a click of the button.

What is Coming:

 - The product team is working hard to constantly improve and enhance the Catina Platform. To learn more about any upcoming features, please check out our [product road map](#).

Reminder:

 - ACD5 is still accessible for completing draft documents.
 - Nightly migrations will transfer any newly finalized documents from ACD5 to Catina, and they will be visible in the "Migrated Documents" list the next day.
4. **Where to manage users?**
 - When you purchase two or more unlimited annual accounts, a designated license administrator can manage users, adjust settings and permissions, invite new users, and deactivate users as needed from the manage users tab. To learn more, check out our **Administrator Role for Multi-Seat Accounts** section of the [Catina Transitioning Guide](#).
5. **Need more seats or documents?** Visit our [homepage](#) to have a look at our subscription tiers, seat options, or add on bundles.

Phase II – Becoming familiar with Catina

1. **Prerequisite to first Class:**
 - Log into Catina, create a project, and select a document. We highly recommend completing this before attending a training class to better familiarize you with the platform. *See addendum for instructions on the above.
2. **Register and take the [Introduction to Catina](#) the Introduction to Catina class.**

Action items to execute in Catina based on the training class

 - Create a New Project: Set up a project by navigating through the platform's project creation feature.
 - Start a New Document: Create a new contract document. Follow steps to select a template, customize it, and input project-specific details.

- Track Document Revisions: Utilize Catina’s version control to track revisions to your documents. Practice viewing previous versions and reverting to older copies if needed.
 - Explore Basic Editing Features: Familiarize yourself with basic document editing features such as adding text, Approving/Rejecting changes, using the rich text toolbar.
 - Sign a document: E-Signature: Try out the digital signature function (DocuSign). Ink-Signature: Try out the ink-signature (Pen and paper wet signature). Download and print the document. Obtain the necessary signatures, then scanning and uploading the signed copies back into Catina
3. **Register and take the [Diving Deeper into Catina](#) class.**
- Action items** to execute in Catina based on the training class
- Create Custom Templates: Develop a Custom template tailored to specific project needs, streamlining the document creation process for future use.
 - Offline Editing: Test the offline editing capabilities by downloading a document, making changes and then uploading the revised document back to Catina.
 - Import: Import a Catina document from the documents tab
 - Compare: Use the Compare feature to track changes and revisions within documents
 - Next Steps: At this point, we recommend exploring more in-depth training courses that focus on specific functionalities. You can find a list of these training videos [here](#). Be sure to periodically check out the [release notes](#) in the guide and keep an eye on your inbox for emails about exciting new features and functionality that we’re continuously adding.

Phase III – Cut over day

1. Notifications to expect
 - As early as 45 days, you will receive email alerts from ACD informing you that your subscription is set to expire. These emails will provide important information about next steps, so please reference as needed.
 - Once renewed, you will receive your onboarding emails that have important information pertaining to training, resources, product updates, and ACD5 access.
 - As your renewal date approaches. You will receive a reminder within ACD5 to renew within Catina. If your ACD5 subscription has expired, you will see a notification to renew within Catina.
2. In preparation for the migration over to Catina, finalize all drafts in ACD5 (completed/finalized documents will be migrated over to Catina under Migrated Documents)
3. If there are any miscellaneous files (e.g. Excel files) that are hosted in ACD5, you should download/save those before your ACD5 account closes on the stated date.

Key points

1. Still have access to ACD5
 - After you have started using Catina, you can continue to finalize documents in ACD5. Each night, a migration is scheduled to move any newly finalized documents into Catina. Any newly finalized documents will be visible to you on the Migrated Documents list the next day.
2. Look for emails and in-product notifications on new releases and training classes.
3. Let us hear from you! - We will periodically send out a survey in Catina. We value your feedback and insights into what is working and what features we can improve.

Resources

1. [Catina Resources \(aicontracts.com\)](#)
2. [Contact & Support information](#)
3. [Release Notes](#)

4. Feedback on your onboarding process? Please contact us directly at education@aiacontracts.com so we can provide additional resources and support during this transition.

Addendum

Project and Document creation

1. Log into [Catina](#)
2. Create a project
 - Go to the Projects tab.
 - Click New Project.
 - Enter the basic information about your project.
 - Complete the information as thoroughly as possible.
 - This will save time later by reducing manual data entry when creating documents.

When finished, click create, and it will take you to the **Projects** page. Select the project that you just created to open the project.

- Select New Document.
- Search for a document or choose one from the list.
- Select Configure and enter a title for your document (Owner, Contractor, Architect fields are optional).
- Select Add Document.
- Make edits to the document:
 - Enter text into the blue fields or table fields.
 - Add or remove text.
 - Modify fonts, etc.
 - Select Close Document (top left).
- Congratulations, you have successfully edited the document.