

Autodesk Construction Cloud (ACC) Guide-Advanced Change Order Process

Civil Infrastructure

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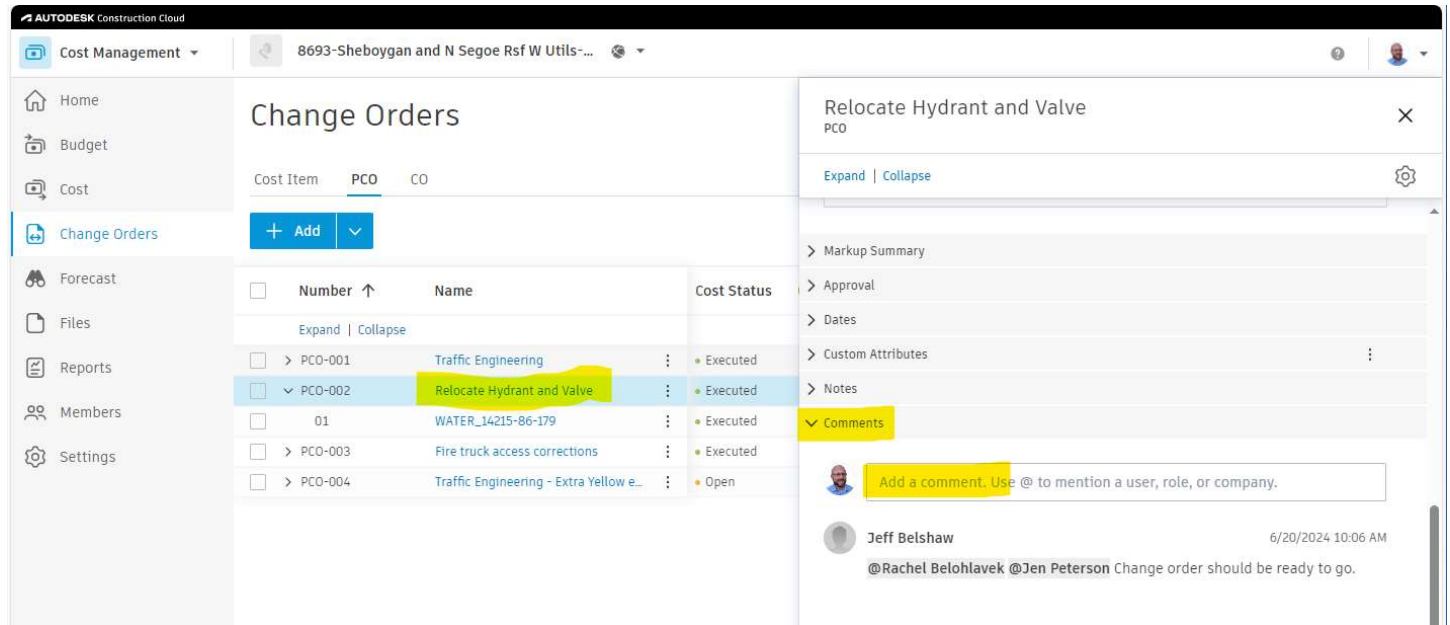
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This guide covers unusual situations. For a more complete step by step guide of a typical change order from start to finish, see regular guide

1. Prepare a CO with input from the project manager or other city agencies

Navigate to Cost Management > Change Orders > PCO. Follow regular guide to create a PCO from scratch or edit it.

Use the commenting feature to notify the construction inspector. Click the line for the PCO, ensure you haven't selected the account instead so that the correct details panel is loaded on the right hand side. Scroll down to comments. Type "@@" then complete to type the user's first name to let them know you are done and the Change Order can proceed.



IMPORTANT: The Construction Inspector (role is COM-ENG-CONST MGR) is responsible for setting the PCO to open once it is ready. Other agencies or engineering's project manager should not set PCOs to open without first consulting with the construction manager to ensure they are aware of the change order.

2. During PCO review with Contractor, the contractor will not sign and you need to redo PCO

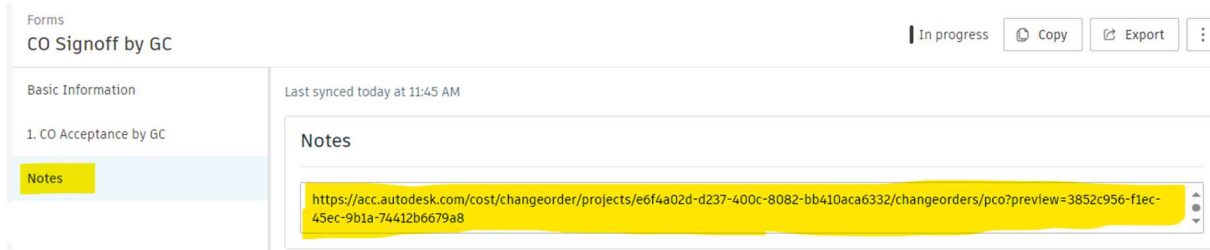
If the contractor has not already done so, instruct them to select "Send back to editors"

This screenshot shows a web interface for a 'CO Signoff by GC' form. The form is currently in an 'In review' state, as indicated by the status bar at the top right. The left sidebar contains 'Basic Information' and 'Notes'. The main content area shows a message: 'Form is in review' and '1 reviewer needs to sign'. Below this message are two buttons: 'Send back to editors' (highlighted in yellow) and 'Sign and submit'. The 'Form Details' section includes fields for Form date (Sep 11, 2024), Location (-), ID (#35), and Due date (-). The Description is 'PCO-003', and it was created by 'zzz COM-ENG-ADSK Automation'. The form is visible to 10 members. A 'References (1)' section shows a file named 'PCO-003.pdf'.

Open the form. Select Discard

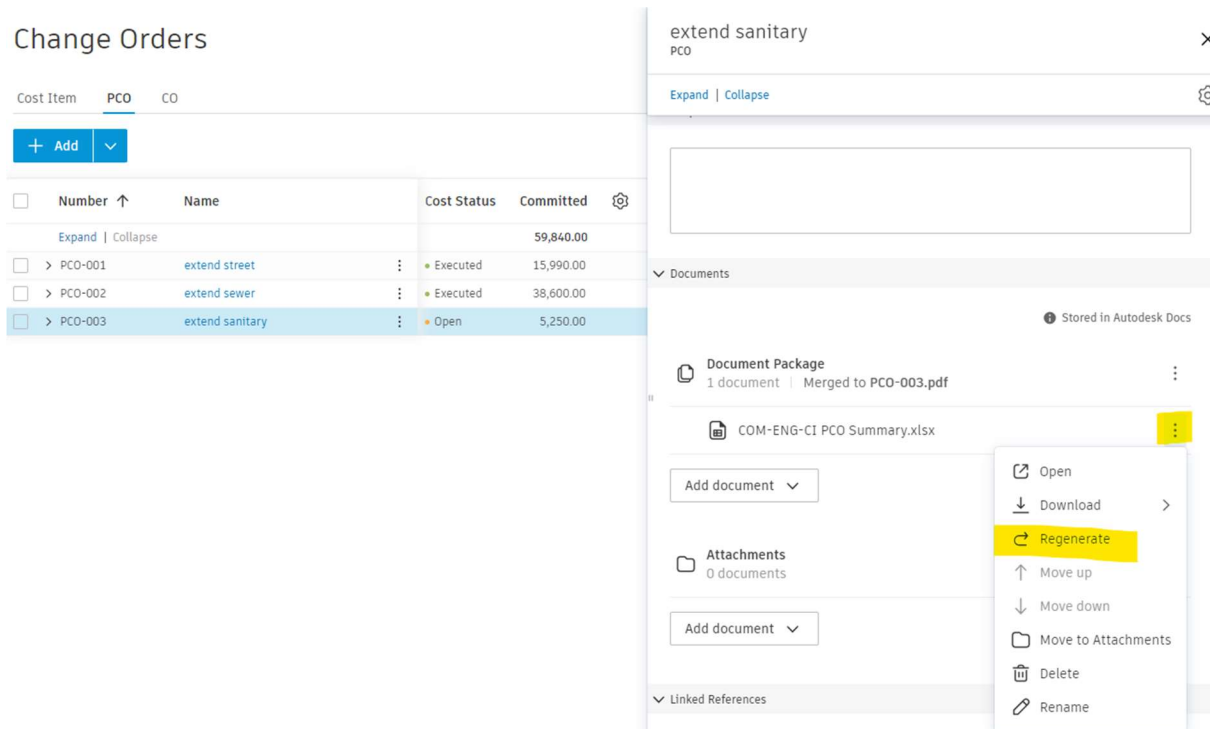
This screenshot shows the same 'CO Signoff by GC' form, but now in an 'In progress' state. The status bar at the top right shows 'In progress' and buttons for 'Copy', 'Export', and a menu icon. The 'Form Details' section has interactive dropdown menus for 'Form date' (set to 9/11/2024), 'Location' (set to 'Select a location'), 'Due date' (set to 'Select date'), and 'Assigned to' (set to 'COM-ENG-CONST MGR'). The 'Description' field is 'PCO-003' and it is visible to 9 members. The 'References (1)' section still shows the 'PCO-003.pdf' file. At the bottom left, a yellow 'Discard' button is highlighted, with the text 'Changes save automatically' next to it. A blue 'Submit' button is located at the bottom right.

Navigate to PCO. You can select notes and copy and paste the URL to get there

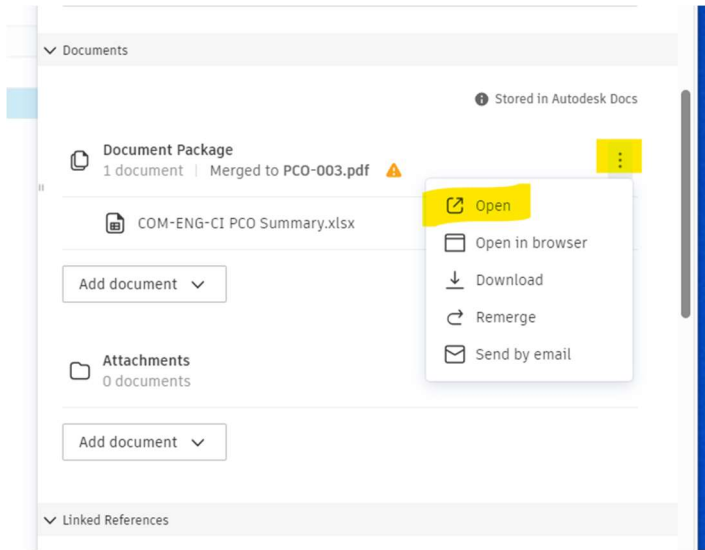


Make changes to the PCO data. Consult the regular change order guide for different ways of modifying or adding items.

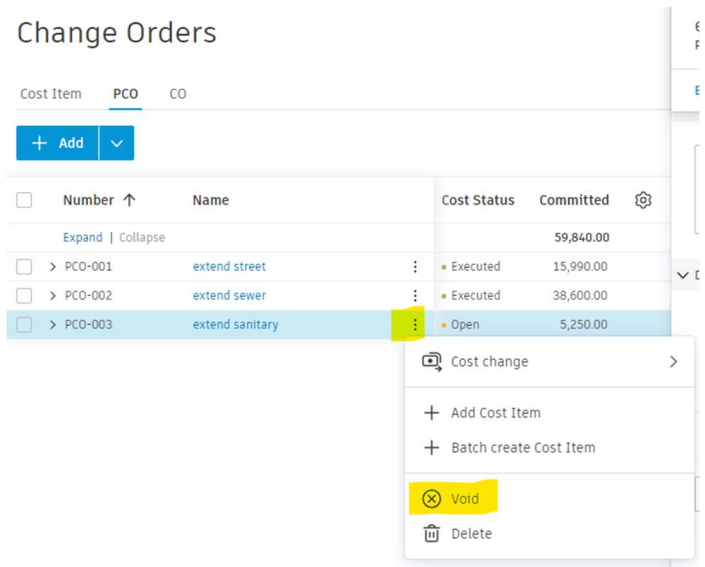
Once you are done, you must regenerate excel file and reprint to PDF. Scroll down to documents. First, regenerate XLSX:



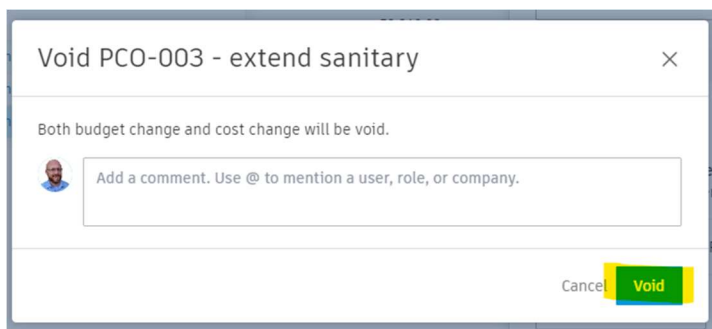
Next, need to reprint to PDF:



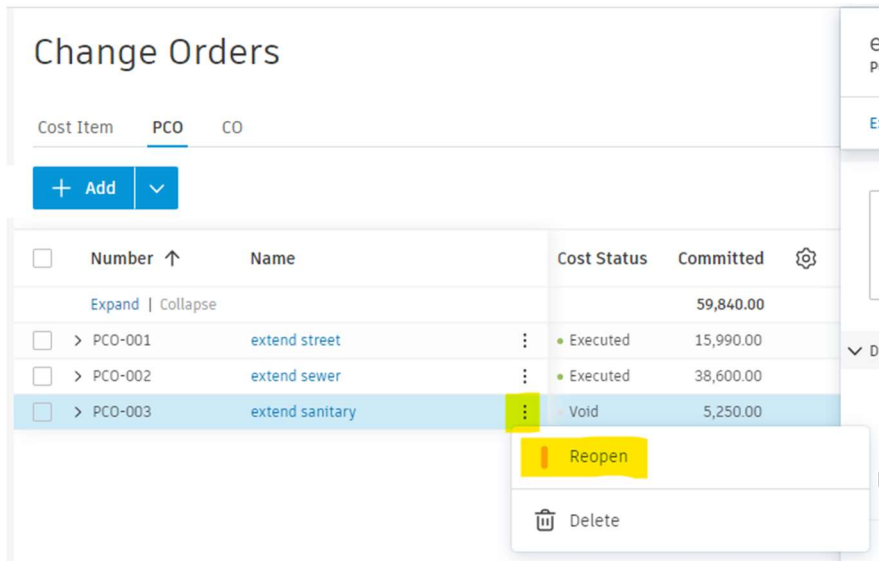
The act of setting the PCO to Open generates the form for the contractor to sign. Since the PCO is still open, we must toggle to void and then toggle back to open in order to create a new form:



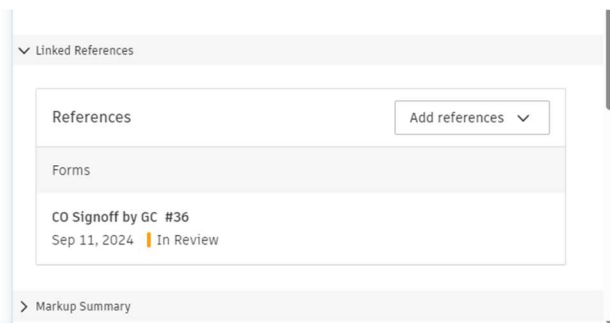
Select "Void"



Click 3 dots again and select "Reopen"



Click refresh and scroll down in the details panel to Linked References. You should see a CO Signoff by GC form In Review:



IMPORTANT: If you don't see a form, it is likely the document package PDF is out of date. Update the document package PDF, set to void, reopen to generate the form again.

3. After PCO signoff by Contractor, you need to change account numbers but not item Qtys or bid prices


If a CO is already generated, first delete the CO:

Change Orders

Cost Item PCO CO

<input type="checkbox"/>	Number ↑	Name	Status	Committed	Type	Additional
Expand Collapse				59,840.00		
<input type="checkbox"/>	> CO-001	extend street	Executed	15,990.00	Non-BPW	
<input type="checkbox"/>	> CO-002	extend sewer	Executed	38,600.00	BPW	
<input type="checkbox"/>	> CO-003	extend sanitary	Open	5,250.00	Non-BPW	

Send

 Delete

Make edits to PCO. Be sure that no qtys or unit prices are changing. In this example, we want to remove a SANITARY SEWER TAP item from the SANITARY account and add it to the STORM account.

First, navigate to cost summary:


Change Orders


Cost Item PCO CO

+ Add v

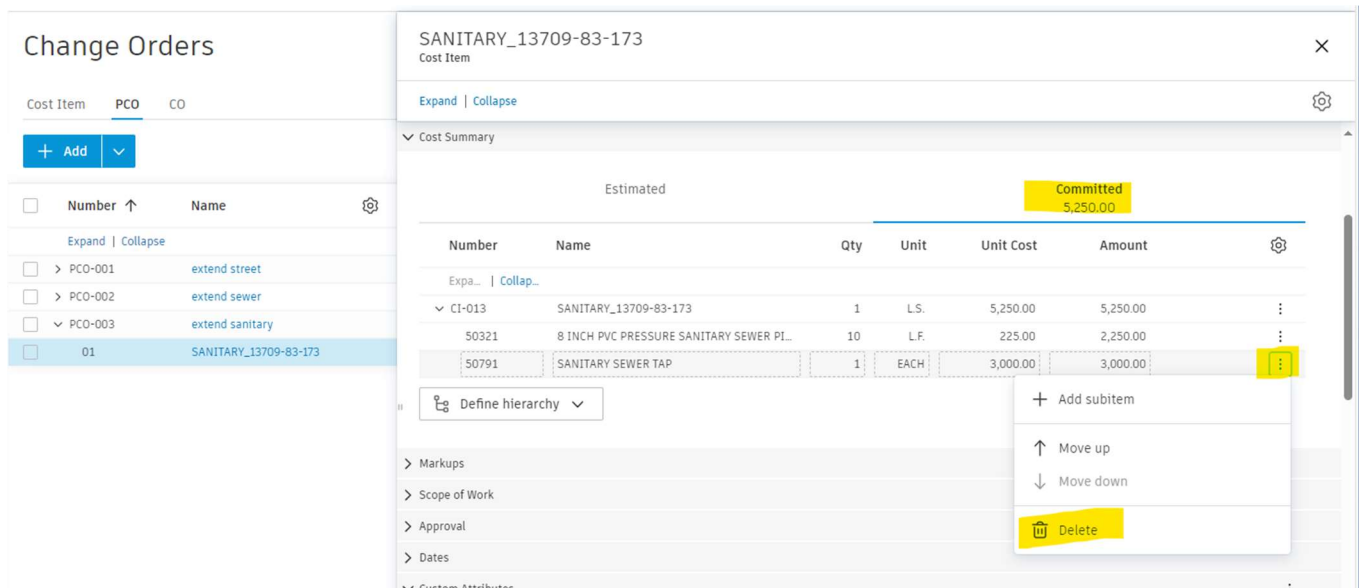
<input type="checkbox"/>	Number ↑	Name	Cost Status	Committed	Additional
Expand Collapse				59,840.00	
<input type="checkbox"/>	> PCO-001	extend street	Executed	15,990.00	
<input type="checkbox"/>	> PCO-002	extend sewer	Executed	38,600.00	
<input type="checkbox"/>	v PCO-003	extend sanitary	Open	5,250.00	
<input type="checkbox"/>	01	SANITARY_13709-83-173	Open	5,250.00	

Define hierarchy

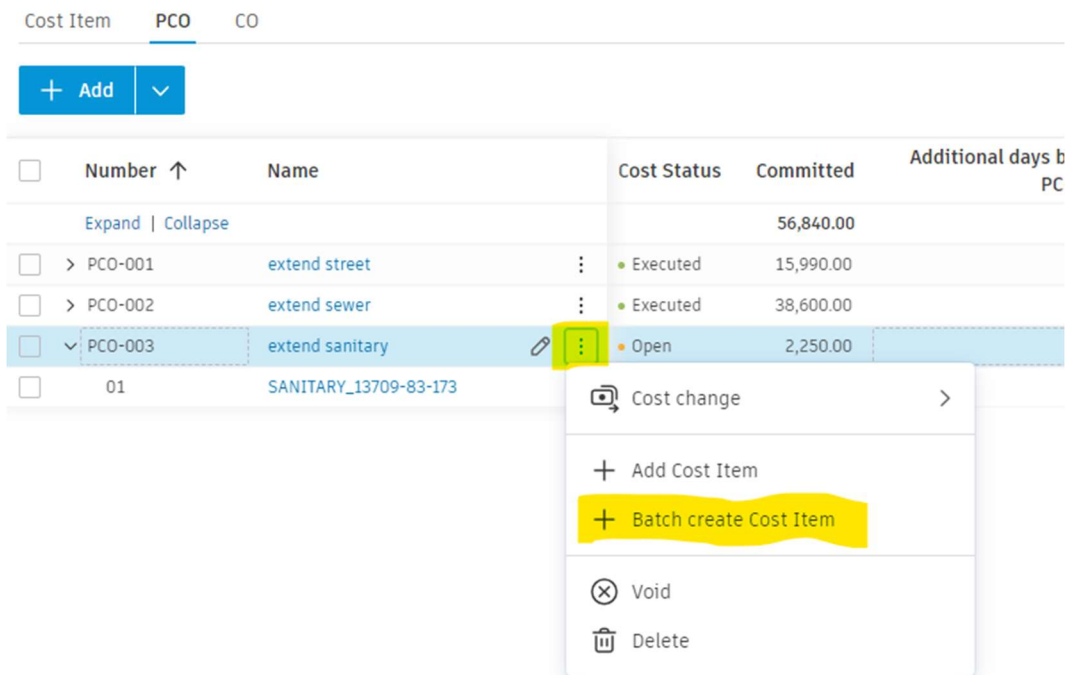
 Detach

 Delete

Click **Committed**. Do a screenshot before deleting the data. Click the 3 dots next to the item you would like to delete. Select Delete.



Close details panel window. Click 3 dots next to PCO name (PCO name, which is “extend sanitary”, not the account). Select **Batch Create Cost Item**



Select the new account (STORM in this example)

Batch create Cost Item

PCO

extend sanitary

Budget *

Search by budget code or name

- BID_123 - STORM_13709-84-174
- BID_13709-402-170 - STREET_13709-402-170
- BID_13709-402-174 - STREET STORM_13709-402-174
- BID_13709-83-173 - SANITARY_13709-83-173
- BID_14034-84-174-84100 - WATER QUALITY (RAIN GARDENS)_14034-84-174-84100
- BID_14034-84-174-84500 - WATER QUALITY (CATCH BASINS)_14034-84-174-84500

[Create new budget](#)

[Group by budget code segment](#)

Click 3 dots and **Define Hierarchy**.

Expand Collapse				56,840.00
<input type="checkbox"/>	> PCO-001	extend street	⋮	● Executed 15,990.00
<input type="checkbox"/>	> PCO-002	extend sewer	⋮	● Executed 38,600.00
<input type="checkbox"/>	∨ PCO-003	extend sanitary	⋮	● Open 2,250.00
<input type="checkbox"/>	01	SANITARY_13709-83-173	⋮	● Open 2,250.00
<input type="checkbox"/>	02	STORM_13709-84-174	⋮	● Open

Define hierarchy

Detach

Delete

Click **Committed**. Click 3 dots and select **Add subitem**

The screenshot shows a software interface for managing cost items. On the left, a tree view lists items under PCO and CO. The main area displays a table with columns for 'Estimated' and 'Committed'. A dropdown menu is open over the table, showing 'Add subitem' and 'Import subitems' options. The 'Committed' column has a value of 3,000.00.

Number	Name	Qty	Unit	Unit Cost	Amount
CI-014	STORM_13709-84-174	1	L.S.		
					3,000.00

Complete the highlighted information. **Amount** should autocalculate. Everything had to be manually typed in because there were no SANITARY SEWER TAP items under the storm account. Under Custom attributes **N/B**, select B for Bid

Change Orders

The screenshot shows a detailed view of a cost item. The table lists subitems with their respective quantities and unit costs. The 'N/B' dropdown menu is set to 'B'. The 'Committed' amount is 3,000.00.

Number	Name	Qty	Unit	Unit Cost	Amount
CI-014	STORM_13709-84-174	1	L.S.	3,000.00	3,000.00
50791	SANITARY SEWER TAP	1	ea	3,000.00	3,000.00

IMPORTANT: Do not edit the documents as the GC has already agreed to the changes. Be sure that no qtys or unit prices are changing.

Close details panel. Click 3 dots next to PCO name (**extend sanitary**). Select **Cost Change > Generate CO**

Change Orders

Cost Item **PCO** CO

+ Add **▼**

<input type="checkbox"/>	Number ↑	Name		Cost Status	Committed	Additional days by PCO	Budget Name
Expand Collapse					59,840.00		
<input type="checkbox"/>	> PCO-001	extend street	⋮	● Executed	15,990.00		
<input type="checkbox"/>	> PCO-002	extend sewer	⋮	● Executed	38,600.00		
<input type="checkbox"/>	▼ PCO-003	extend sanitary	⋮	● Open	5,250.00		
<input type="checkbox"/>	01	SANITARY_13709-83-173					
<input type="checkbox"/>	02	STORM_13709-84-174					

- Cost change** >
- + Add Cost Item
- + Batch create Cost Item
- ⊗ Void
- 🗑 Delete

- Generate CO**
- ➡ Generate Contract With GC

Go back to regular guide and continue to advance the Change order. You will have to fill out justification data and other custom attributes. Then regenerate XLSX and reprint to PDF.

4. After PCO signoff by GC, or during internal review, need to change due to issue with Cost or Schedule. This includes situations such as the Board of Public Works rejecting a CO

First, the reviewer or a Project Admin should select a review response of **Revise**. You must leave a comment. **Restricted** means that only City Staff can see the comment. Select **Submit**

Delete the Change Order. Download a copy of the Summary XLSX if you would like to save yourself from retyping justification data.

Change Orders

Cost Item PCO CO

<input type="checkbox"/>	Number ↑	Name	Status	Committed	Type	Additional
Expand Collapse				59,840.00		
<input type="checkbox"/>	> CO-001	extend street	Executed	15,990.00	Non-BPW	
<input type="checkbox"/>	> CO-002	extend sewer	Executed	38,600.00	BPW	
<input type="checkbox"/>	> CO-003	extend sanitary	Open	5,250.00	Non-BPW	

Send

Delete

Go to PCO and make your edits. In this example, we are going to change the sanitary tap price to \$2300. Click **Define Hierarchy** next to account containing the item, in this example STORM:

The screenshot shows the 'Change Orders' application. On the left, a table lists cost items under 'PCO' and 'CO' tabs. The item 'STORM_13709-84-174' is selected. A context menu is open over this item, with 'Define hierarchy' highlighted in yellow. Other options include 'Detach' and 'Delete'. On the right, a sidebar shows details for 'STORM_13709-84' Cost Item, including an 'Expand | Collapse' button and a 'Define hierarchy' dropdown menu.

Click **Committed**. Click arrow next to account name containing the item to expand:

This screenshot shows the details for the cost item 'STORM_13709-84-174'. It features a table with columns for 'Number', 'Name', 'Qty', 'Unit', 'Unit Cost', and 'Amount'. The 'Committed' amount is highlighted in yellow. The table contains one row for 'CI-014' with a quantity of 1 and a unit cost of 3,000.00. A 'Define hierarchy' dropdown menu is visible at the bottom.

Number	Name	Qty	Unit	Unit Cost	Amount
CI-014	STORM_13709-84-174	1	L.S.	3,000.00	3,000.00

Type in a new unit cost. Hit tab to have the amount recalculated

This screenshot shows the same cost item details as the previous one, but the unit cost for 'CI-014' has been changed to 2300. The 'Committed' amount remains 3,000.00. The unit cost field is highlighted in yellow.

Number	Name	Qty	Unit	Unit Cost	Amount
CI-014	STORM_13709-84-174	1	L.S.	2300	3,000.00

Click the PCO name, in this case **extend sanitary**. Scroll down to documents. Click 3 dots next to XLSX. Select **Regenerate**

Change Orders

Cost Item **PCO** CO

[+ Add](#) [v](#)

Number ↑	Name	Cost Status	Committed
Expand Collapse			59,140.00
<input type="checkbox"/> > PCO-001	extend street	Executed	15,990.00
<input type="checkbox"/> > PCO-002	extend sewer	Executed	38,600.00
<input checked="" type="checkbox"/> v PCO-003	extend sanitary	Open	4,550.00
<input type="checkbox"/> 01	SANITARY_13709-83-173	Open	2,250.00
<input type="checkbox"/> 02	STORM_13709-84-174	Open	2,300.00

extend sanitary
PCO

[Expand](#) | [Collapse](#)

Documents

Stored in Autodesk Docs

Document Package
1 document | Merged to PCO-003.pdf

COM-ENG-CI PCO Summary.xlsx

[Add document](#) v

Attachments
1 document

Forms - CO Signoff by GC - #36-202409121605.pdf

[Add document](#) v

Linked References

Wait for blue wheel to finish spinning. Click 3 dots next to PDF. Select **Open**

Document Package
1 document | Merged to PCO-003.pdf

COM-ENG-CI PCO Summary.xlsx

[Add document](#) v

Attachments
1 document

Forms - CO Signoff by GC - #36-202409121605.pdf

[Open](#)

[Open in browser](#)

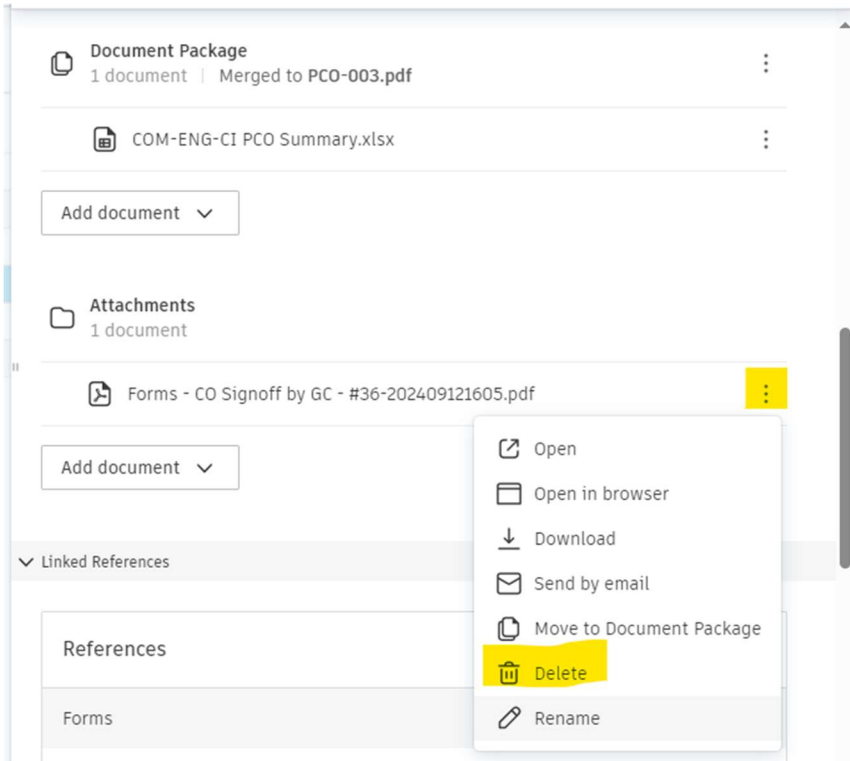
[Download](#)

[Remerge](#)

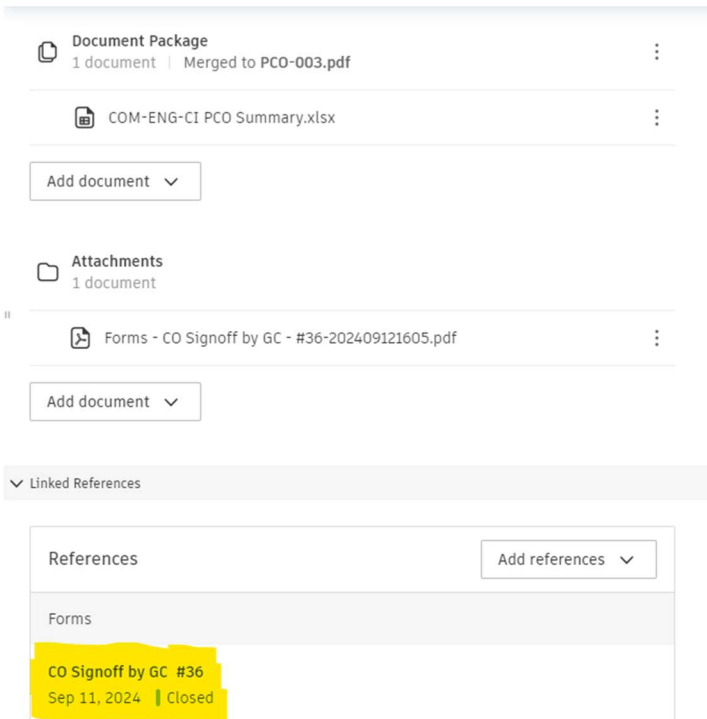
[Send by email](#)

Examine the PDF and verify everything is good.

Delete the attachment:



Scroll down to **Linked References**. Click the form.



Select **Archive** in the upper right.

Form date	Location
Sep 11, 2024	-
ID	Due date

Go back to the PCO. The act of setting the PCO to Open generates the form for the contractor to sign. Since the PCO is still open, we must toggle to void and then toggle back to open in order to create a new form:

Number	Name	Cost Status	Committed
PCO-001	extend street	Executed	15,990.00
PCO-002	extend sewer	Executed	38,600.00
PCO-003	extend sanitary	Open	5,250.00

Select "Void"

Void PCO-003 - extend sanitary

Both budget change and cost change will be void.

Add a comment. Use @ to mention a user, role, or company.

Cancel Void

Click 3 dots again and select "Reopen"

The screenshot shows a table titled "Change Orders" with columns for "Number", "Name", "Cost Status", and "Committed". The table lists three items: PCO-001 (extend street, Executed, 15,990.00), PCO-002 (extend sewer, Executed, 38,600.00), and PCO-003 (extend sanitary, Void, 5,250.00). A context menu is open over the PCO-003 row, showing "Reopen" and "Delete" options. The "Reopen" option is highlighted in yellow.

Number	Name	Cost Status	Committed
Expand Collapse			
			59,840.00
> PCO-001	extend street	Executed	15,990.00
> PCO-002	extend sewer	Executed	38,600.00
> PCO-003	extend sanitary	Void	5,250.00

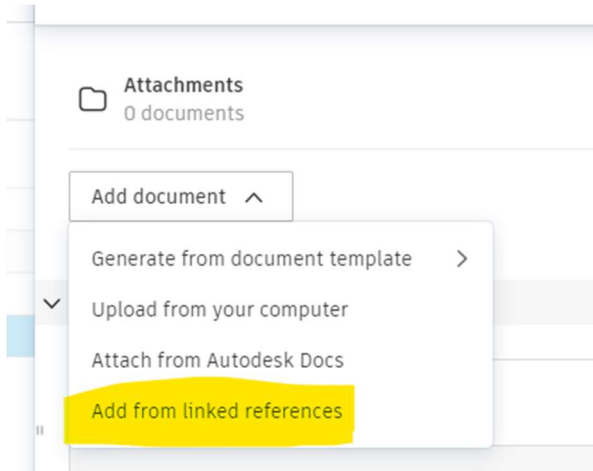
Click refresh and scroll down in the details panel to Linked References. You should see a CO Signoff by GC form In Review. The previous Form is no longer valid and is marked as Archived

The screenshot shows the details panel for the "extend sanitary" change order. The table in the background shows PCO-003 with a status of "Open" and a committed amount of 4,550.00. The details panel includes sections for "Attachments" (0 documents), "Linked References", and "References". Under "References", there are two entries: "CO Signoff by GC #36" (Sep 11, 2024, Archived) and "CO Signoff by GC #37" (Sep 12, 2024, In Review). The "CO Signoff by GC #37" entry is highlighted in yellow.

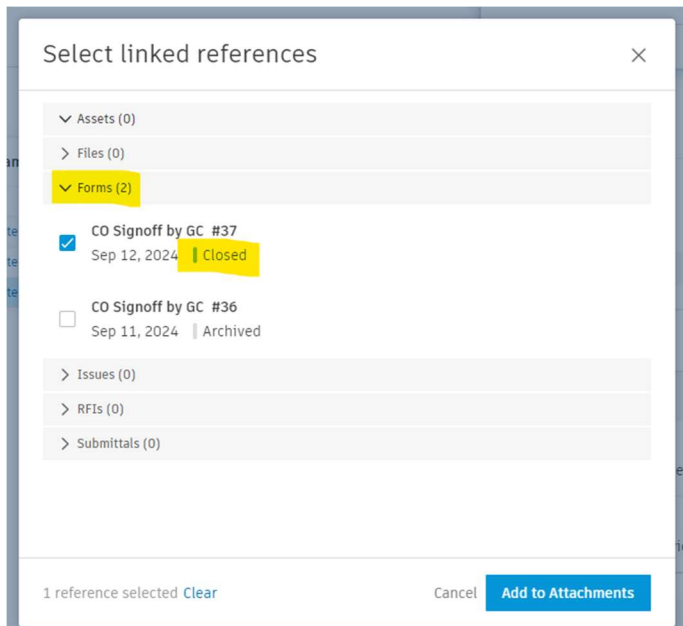
Number	Name	Cost Status	Committed
Expand Collapse			
			59,140.00
> PCO-001	extend street	Executed	15,990.00
> PCO-002	extend sewer	Executed	38,600.00
> PCO-003	extend sanitary	Open	4,550.00

After the contractor has signed, you will receive an email to complete the rest of the PCO

Be sure to include the correct file export as the attachment, you do not want to include the old CO Signoff by GC Form



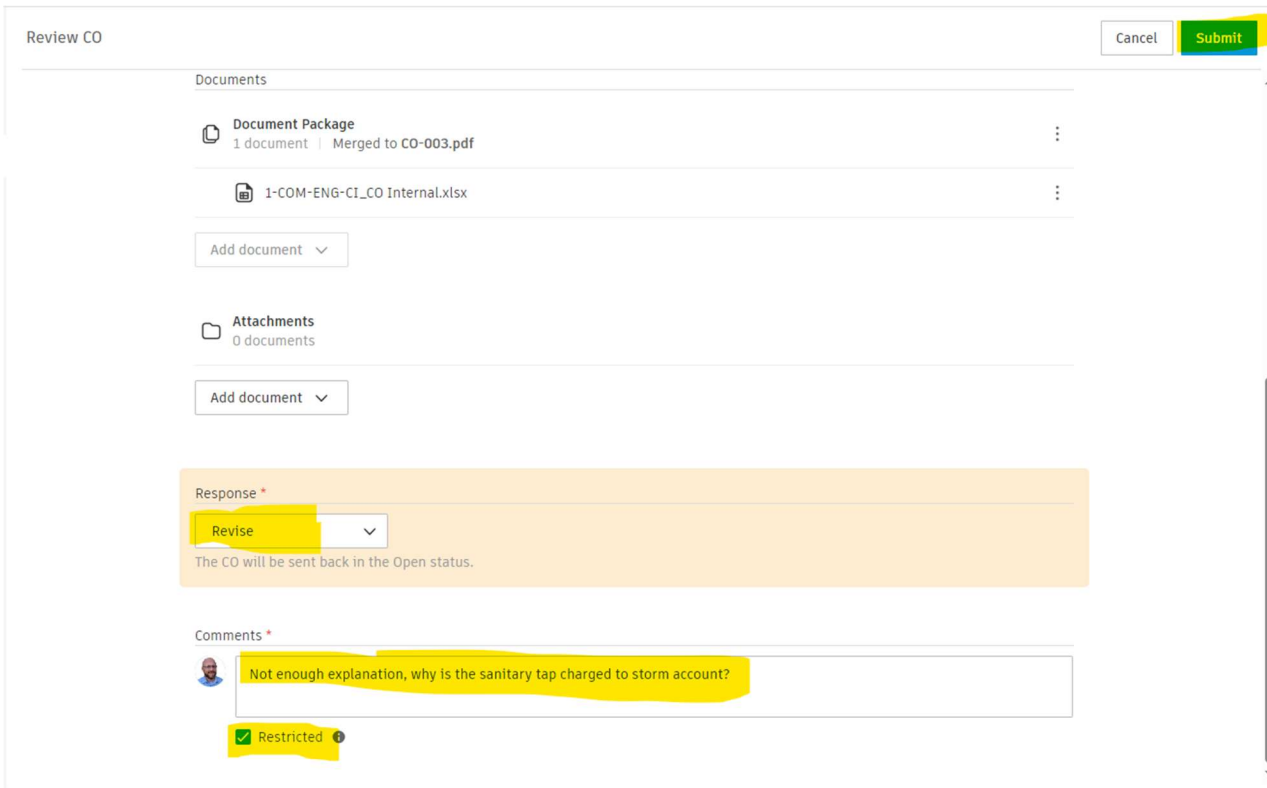
Select the new **Closed** form, not **Archived**



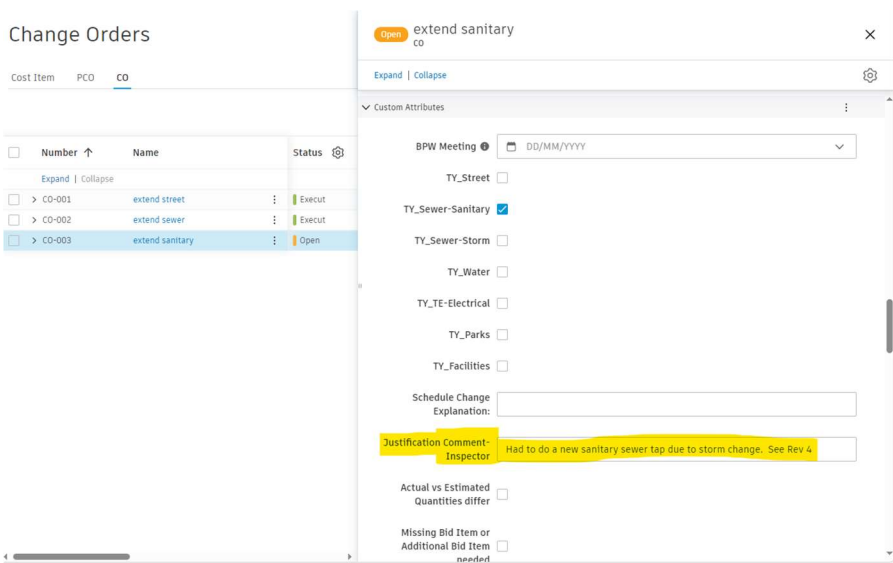
Complete the PCO and CO per the rest of the regular guide.

5. During CO internal review, reviewer selects Revise because more justification is needed.

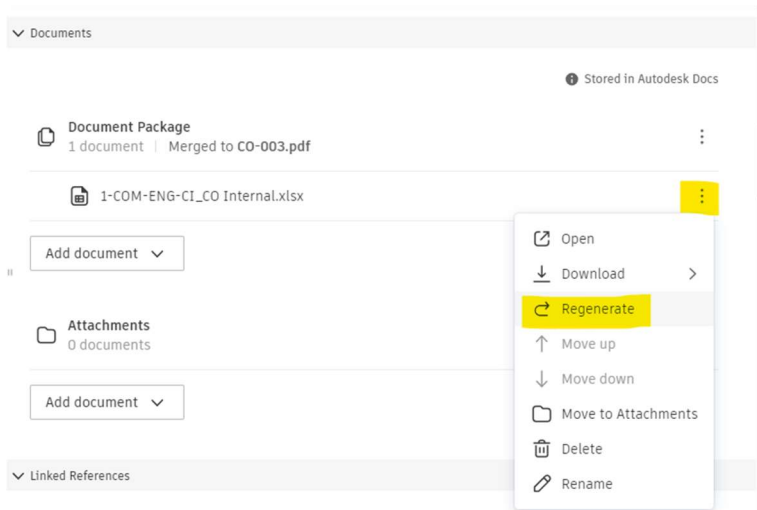
First, reviewer selects **revise** and provides a comment. Select **Submit**



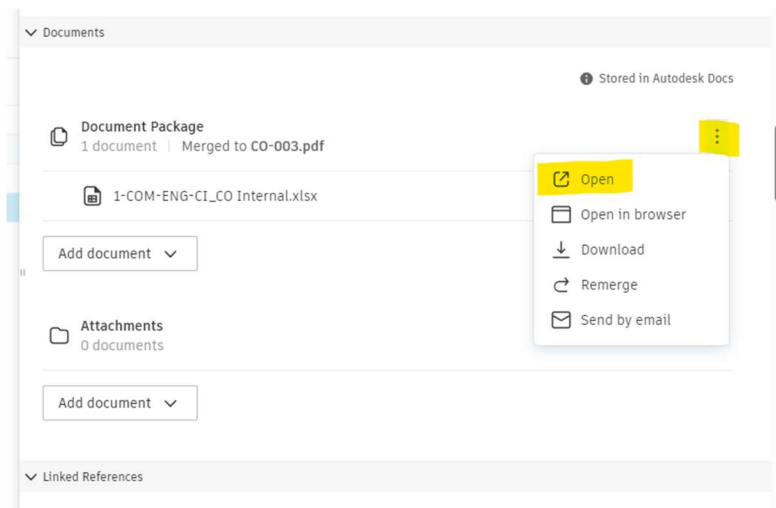
Construction Inspector will get a notice of the Revise response. Examine comment and update Justification. Scroll down to custom attributes and change **Justification Comment-Inspector**:



Scroll up to Documents section. Regenerate XLSX:



Open to PDF:



View PDF to verify that everything is good.

If everything is good, **Send** for review:

