

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

## Facilities Management

### Regular Change Order Process

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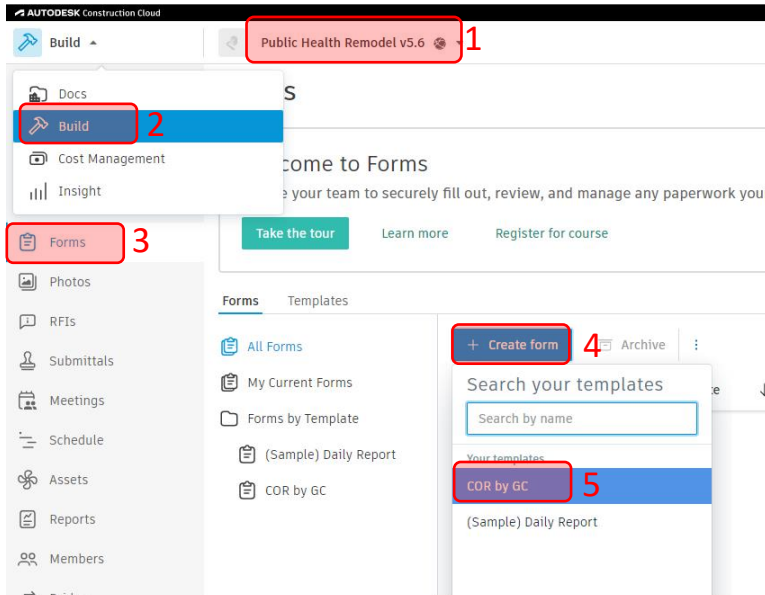
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This guide only covers the basic process for Change Orders that may or may not have a schedule extension. For less common workflows, see the advanced guide for more detail on the following topics:

- During PCO review with Contractor, the contractor will not sign and you need to redo PCO
- After PCO signoff by Contractor, you need to change account numbers but not item Qty's or bid prices
- During CO internal review, reviewer selects Revise because more justification is needed
- During CO internal review, reviewer selects Revise due to issue with Cost or Schedule. This includes situations such as the Board of Public Works rejecting a CO.

### 1. Build-Contractor Completes GC by COR form

Select the correct project from the drop down near the upper left. Go to *Build > Forms*. Click blue “+ Create form” button, select *COR by GC*



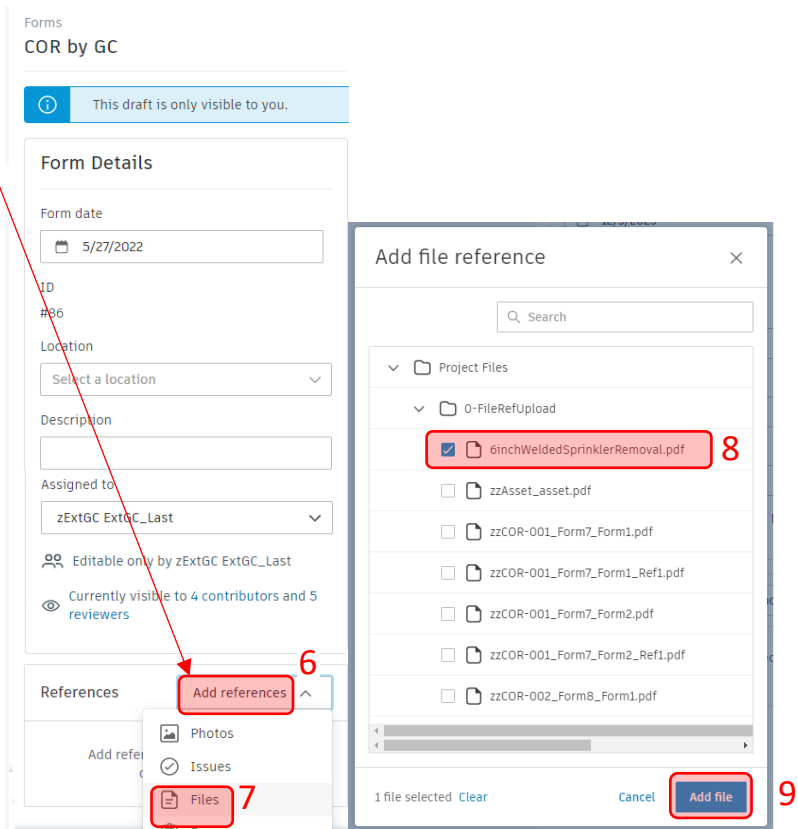
Fill out form per instructions on form, copied below. **Steps 1-4 of Form**

**Instructions to General Contractor:**

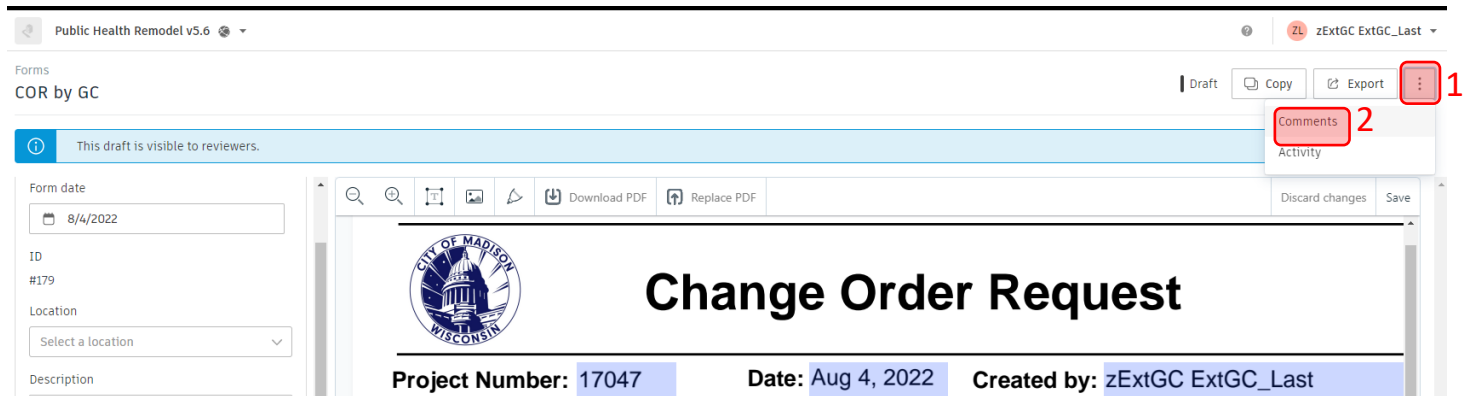
1. Open new browser tab or window to *Files* tab. Upload PDFs documenting *COR* costs to folder *0-FileRefUpload*
2. In *References* section, to the left of form window > *Add Reference* drop down > *Files*. Navigate to file from step 1.
3. Input name, and check box below as needed.
4. Input values in fields highlighted in light blue, all other fields self-calculate.
5. **Submit** when complete.

**NOTE:** Not all file types can be referenced, but PDF, DOCX, XLSX, PNG, JPG are among supported file types. Other references (*Photos, Issues, Forms, and Assets*) are not supported at this time.

**TIP:** You can open the *Files* tab of *Build* in a new window or tab. This will allow you to drag and drop a file to the *0-FileRefUpload* folder without navigating away from the form. The file must be uploaded prior to open the *Add File Reference* dialog box. Files attached to forms are automatically renamed to keep any new uploads to *0-FileRefUpload* at the top of the list.



At any time (regardless of whether the form is editable to user) a contributor or reviewer can add comments on the form (indicated by 1 & 2). Use @ and autocomplete individual or role name to send them a direct email notification. All other contributors and reviewers are notified with each comment.



Public Health Remodel v5.6 zExtGC ExtGC\_Last

Forms  
COR by GC

Draft Copy Export

This draft is visible to reviewers.

Form date  
8/4/2022

ID  
#179

Location  
Select a location

Description

Download PDF Replace PDF

Discard changes Save

**Change Order Request**

Project Number: 17047 Date: Aug 4, 2022 Created by: zExtGC ExtGC\_Last

Once complete, hit submit in the lower right. This will submit the form to the Construction Manager for Review.

## 2. Build-Construction Manager Reviews GC by COR form

Construction Manager will receive an email that a form has been assigned to them for review. Follow link to get to the form. The Construction Manager can review the form and its referenced files. Use the comments feature shown on the previous page (indicated by 1 & 2) to interact with Contractor and other contributors or reviewers. Use @ and autocomplete individual or role name to send them a direct email notification. All other contributors and reviewers are notified with each comment.

Forms in the *Review* state can proceed one of two ways. *Send back to editors* if any changes are needed by the Contractor. Or, once everything has been reviewed and is ready to process as a Change Order, click the blue *Sign and submit* button.

**NOTE:** Submitted forms cannot be removed. The process to hide the form and undo the Change Order Request is involved and should be avoided.

### 3. Cost Management-Construction Manager processes Change Order Request

**NOTE:** Every 5 minutes, an automated Recipe (a program that runs on the ACC Connect platform through Workato) scans for submitted forms. Once a *COR by GC* is submitted within that time window, an email is automatically sent to the Construction Manager notifying them of the Change Order Request.

Click the link in the email from Workato.

Change to *Default View* if not already set. Click *Budget Code* column to assign either a specific Account or the main Contingency budget. Budgets must already be setup.

Enter data for: *N/B* (Negotiated/Bid) and *CO Just. Comments-CPM/CCM* (Change Order Justification Comments by City Project Manager and City Construction Manager)

#### Change Orders

Change Order Request
Processing Change Order
Change Order

+ Add

Export

 Default view

Numb er	Name	Cost Status	Budget code	Committed	Processi ng...	Change Order	Type	N /B	CO Just. Comments-CPM/CCM
				111,892.78					
<input type="checkbox"/>	COR-027 COR-027-add outlet at data rack	Executed		167.66	PCO-005	CO-005	No Cont Ext	B	Justification comments for COR-027...
<input type="checkbox"/>	COR-028 COR-028-Relocate existing pneumatic line	Executed		1,955.94	PCO-005	CO-005	No Cont Ext	N	Justification comments for COR-028...
<input type="checkbox"/>	COR-029 COR-029-Change privacy rm countertops to 26" deep laminate	Executed		811.44	PCO-005	CO-005	No Cont Ext	N	Justification comments for COR-029...
<input type="checkbox"/>	COR-030 COR-030-Relocate thermostats	Executed		338.55	PCO-005	CO-005	No Cont Ext	B	Justification comments for COR-030...
<input type="checkbox"/>	COR-031 COR-031-All work to shift wall layout to expand office 501	Executed		21,025.61	PCO-006	CO-006	No Cont Ext	N	Stakeholders determined a change is required in room layout.
<input type="checkbox"/>	COR-032 COR-032-Add power & data outlets in 3 conference rooms	Draft	<div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <ul style="list-style-type: none"> <li>ADL_12348-45-151 - Paving</li> <li>BID_11111-1414-11 - Chip Sealing East</li> <li style="background-color: #e1ecf4;">BID_12345-67-890 - Base Construction Contract ✓</li> <li>BID_12346-15-484-00012 - Solar</li> <li>BID_12347-54-45 - Signage</li> <li>BID_12348-15-154 - Landscaping</li> <li>Create new budget</li> <li>Group by budget code segment</li> </ul> </div>	926.52		Cont Ext Requ...	N	Unforseen stakeholder needs that were uncovered during constru...	

Click the blue text for the *Name* of the Change Order Request to bring up the fly out.

**COR-032-Add power & data outlets in 3 conference rooms** ✕

Change Order Request

▼ Details

**Number** COR-032

**Name**

**Description**

**Budget**

**Main Contract** [Main Contract](#)

**Contract With GC**

**Supplier**

**Cost Status** Draft **Scope** Assigned

**Schedule Change**  Days

**Type**

**Location**

▼ Documents

📄 Stored in Autodesk Docs

**Attachments**  
2 documents

---

📄 zzCOR-032\_Form389\_Costs.pdf ⋮

---

📄 zzCOR-032\_Form389\_Ref1\_CBFloorBoxOutlets.pdf ⋮

---

**NOTE:** Many of the attributes visible in the flyout can also be turned on by clicking the gear icon and then inputted in the table view. However, there are some attributes that can only be edited or viewed via the flyout.

<“**Description**” has auto-populated text for tracking purposes. For example, this was COR-032, Submitted December 1<sup>st</sup> 2022 at 3:10:04 AM and Form ID #389

Open the attachments to confirm they are correct.

<PDF of form as submitted.

< File(s) attached to *COR* by *GC* by way of file reference

See next page

> Related Change Orders

> Cost Summary

> Markups

> Scope of Work

> Approval

> Dates

▼ Custom Attributes ⋮

N/B

CO Just. Comments-CPM/CCM

Actual vs Estimated Quantities differ

Missing Bid Item or Additional Bid Item needed

Field Decision (Expanded Scope)

Differing site conditions

Design did not adequately anticipate field conditions

Underground conflicts (utility revision)

Design Changes

Continued...

<Previously entered

<Previously entered

<Select checkboxes to indicate justification for the Change Order

Click the 3 vertical dots next to name of the COR. *Assign > Prelim Change Order*. Type a name for the Prelim Change Order, be sure to click *Create option...* or else nothing will be created or assigned.

### Change Orders

Change Order Request Processing Change Order Change Order

+ Add

Number	Name	Process	Change Order	Type	N/B	CO Just.
<input type="checkbox"/>	COR-030 -Relocate thermostats					
<input type="checkbox"/>	COR-031 -All work to shift wall layout to expand office 501					
<input type="checkbox"/>	COR-032 -Add power & data outlets in 3 conference rooms	<span>⋮</span> 1	Draft	926.52		

Define hierarchy

Assign 2 > Processing Change Order 3

Assign to Processing Change Order

Name \*

4

5

Cancel Create and Assign 6

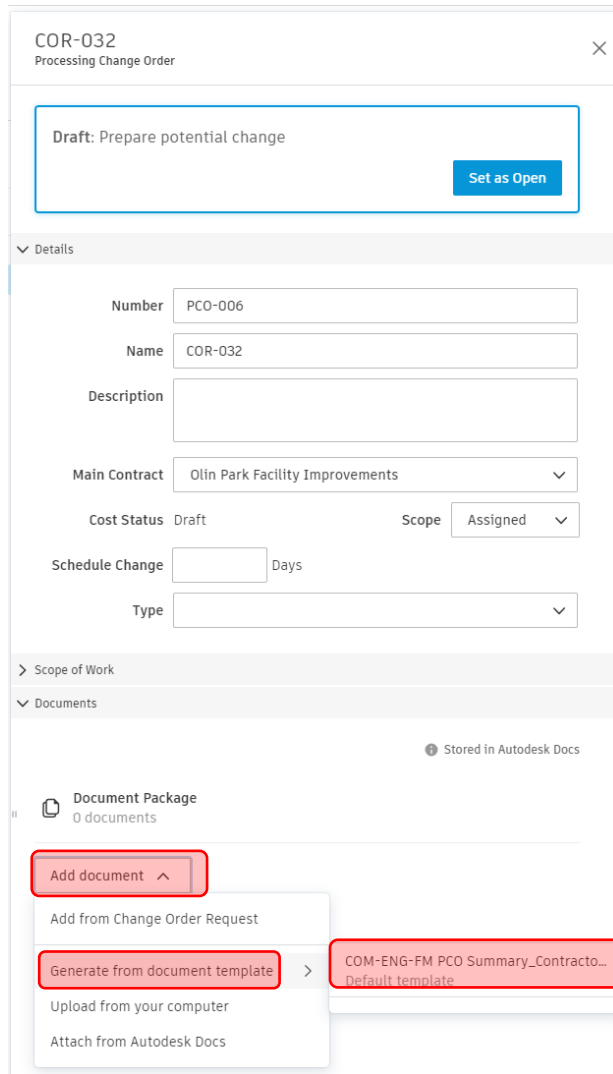
### 4. Cost Management - Construction Manager prepares Change Order for Contractor Signoff

Clicking the PCO number in the column Creating a PCO switches tabs to *PCO*. Click arrow next to *PCO* to see COR(s). Input *New End Date* if needed at the PCO level. This is the new contract end date as a result of this change order.

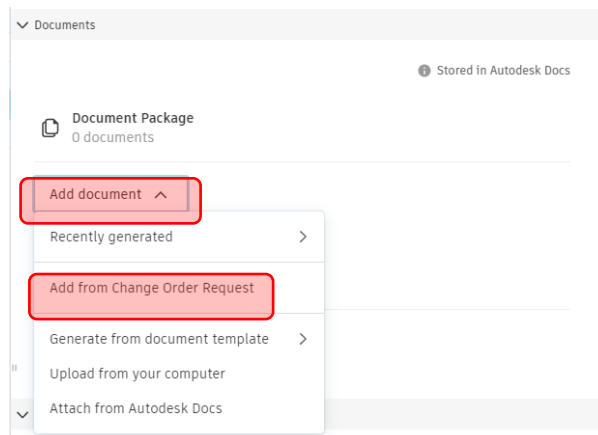
The screenshot shows the Autodesk Construction Cloud interface for 'Change Orders'. The left sidebar contains navigation options: Home, Budget, Cost, Change Orders (selected), Forecast, Files, Reports, Members, and Settings. The main area displays a table of change orders under the 'Processing Change Order' tab. The table has columns: Number, Name, Cost Status, Committed, New End Date by PCO, and Budget Name. A row for 'PCO-006' is highlighted, with a red box around the 'PCO-006' text and another red box around the 'Select date' button in the 'New End Date by PCO' column. Below the table, a calendar widget is visible, showing the month of June 2023. The calendar has days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates from 1 to 30. The date 29 is highlighted in blue.

Number	Name	Cost Status	Committed	New End Date by PCO	Budget Name
Expand   Collapse			926.52		
PCO-006	COR-032	Draft	926.52	Select date	
01	COR-032-Add power & data out...	Open	926.52		Base Construction Contract

Click the name of the PCO to bring up the flyout. Under Documents, click *Add document* and then select *Generate from document template*. Select the only option.



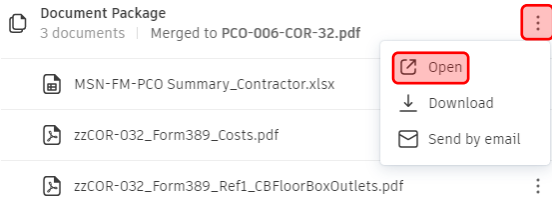
Click Add document again. This time, select *Add from Change Order Request*





**TIP:** Documents can be reordered by clicking to left of file icon and dragging. Will need to reopen to merge into new document package and new file version.

Open the document package to open the file that the contractor will review:

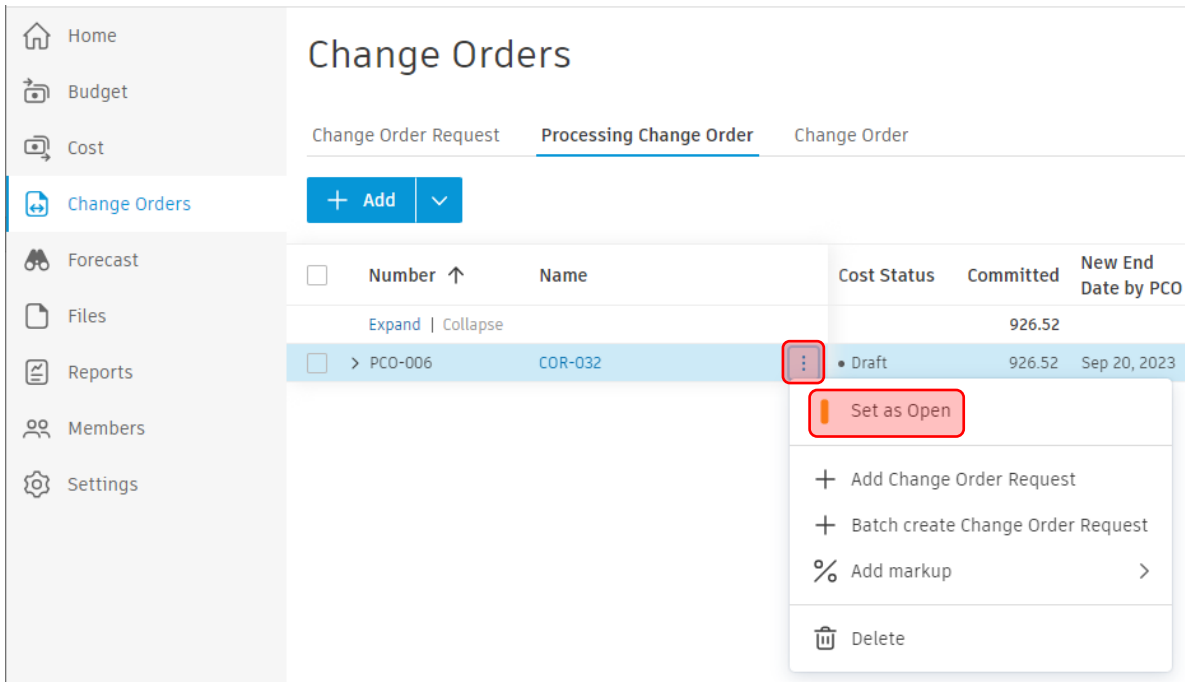


**IMPORTANT:** This file is a legally binding change to the contract. Ensuring the file is correct is critical so that the contractor can agree to the contract changes.

Changes to data in the system aren't immediately populated—you must regenerate document template if anything is changed.

**IMPORTANT:** Setting a PCO to open with an up-to-date merged document package PDF will trigger an automation that performs several steps. An up-to-date merged document package means that the document package has been opened since the latest change to one of the documents composing it was changed. **Be sure document package PDF is correct before setting PCO to open because setting PCO to Open send the agreement to the contractor for signature.**

Click the 3 vertical dots next to the PCO Name. Click *Set As Open*.



The automation will create a *CO Signoff by GC* form and send you an email to notify you.

**If the document package PDF was not opened after its XLSX file composing it was changed, the form will not be created upon setting to Open.** In that case, you will have to Set the PCO as Void, remerge the files and then Reopen the PCO.

## 5. Build-Contractor approves *CO Signoff by GC* form

Contractor will receive an *Action Required...* email with a link to a form *CO Signoff by GC*. Follow the link. View the file reference. Click *Show More* to read entirety of statements.

If you approve, add select *Sign and Submit*. If you have any questions or are not ready to sign, use the comments. The methodology to add comments by clicking the dialog bubble icon as shown is the same as it was for the *COR by GC form*.

If through comments it is determined that the document needs changes, select *Send back to editors*.

**Only Sign and Submit the form if you approve the Change Order and your signature looks good. The form cannot be edited after you submit.**

Forms  
CO Signoff by GC In review Export

Last synced today at 03:23 PM

**Form Details**

Form date  
Jun 29, 2023

ID  
#12

Location  
-

Description  
PCO-006

Created by  
zzz COM-ENG-ADSK Automation

Last updated  
Jun 29, 2023

Visible to 7 members

**References**

Files

PCO-006.pdf

**Form is in review**  
1 reviewer needs to sign

[Send back to editors](#) [Sign and submit](#)

**1. CO Acceptance by GC**

This contract change order agreement has been submitted under Sec. 104.3 of the Standard Specifications for Public Works Construction...

[Show more](#)

1.1 BY SIGNING AND SUBMITTING FORM, GENERAL CONTRACTOR AGREES THAT:

I have reviewed all pages of the file in References and Accept the Change Order to the contract as described in the file. My signature affirms I am using my own Autodesk ...

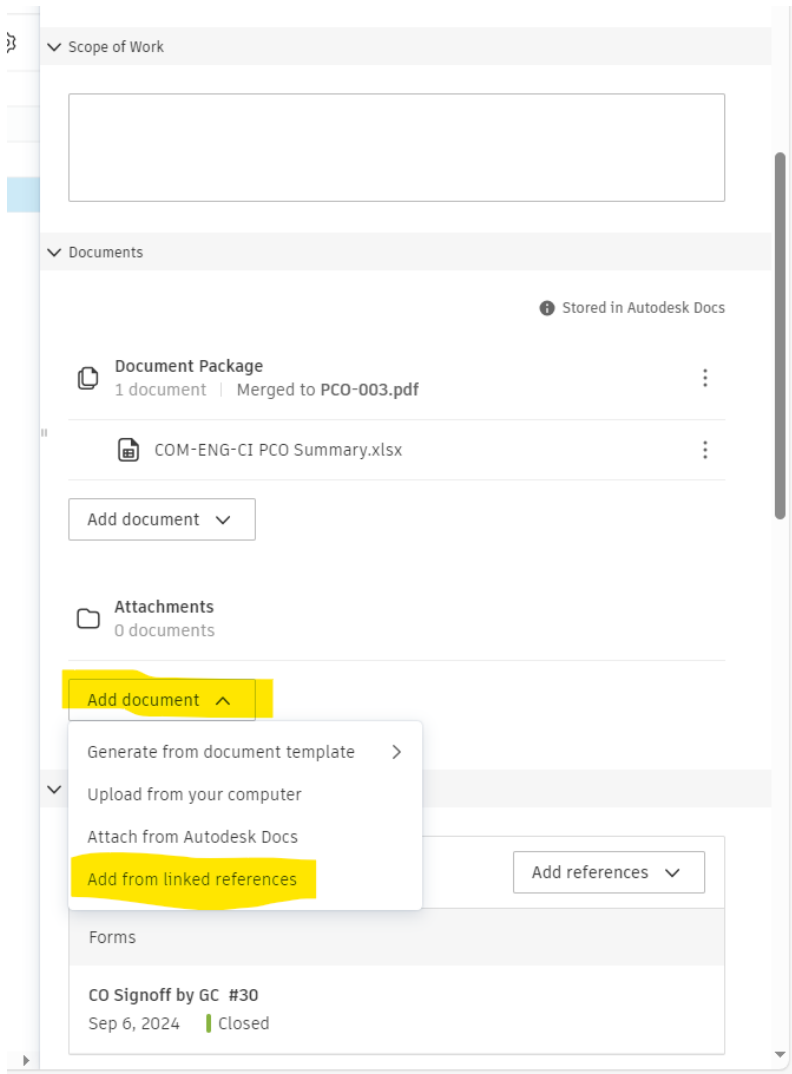
[Show more](#)

## 6. Cost Management-Construction Manager prepares Change Order for staff review

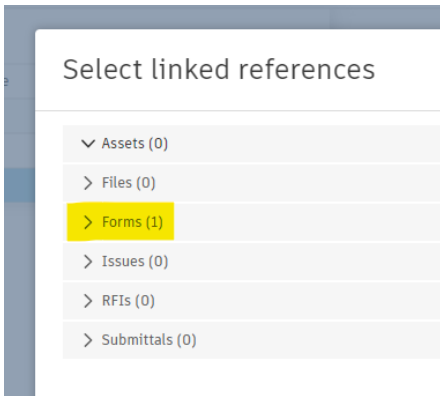
After the contractor has signed the *CO Signoff by GC form*, the Construction Inspector will receive an Autodesk email immediately. It contains a link to the Form, which alone isn't of much use.

You will also receive a Workato email within 5 minutes that contains a link to the corresponding PCO and Form. **Next, we need to attach documentation to the PCO to show that contractor has signed off.**

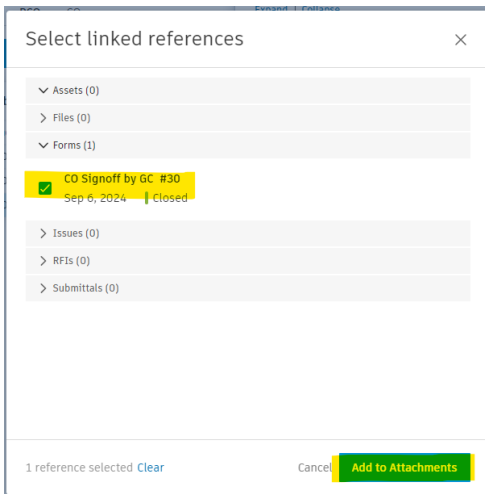
In Workato Email, open link to PCO. In flyout, scroll to *Documents* section. Under *Attachments* click *Add Document*. Select *Add from linked references*.



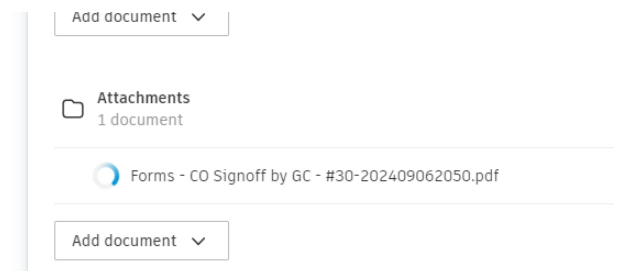
6 possible types of references show up in the list but only 1 actually is present under Forms. Expand Forms



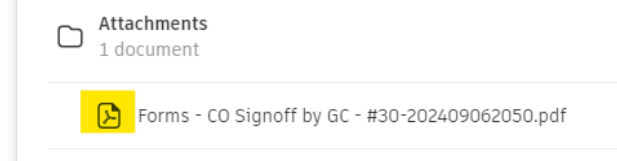
Select the only option:



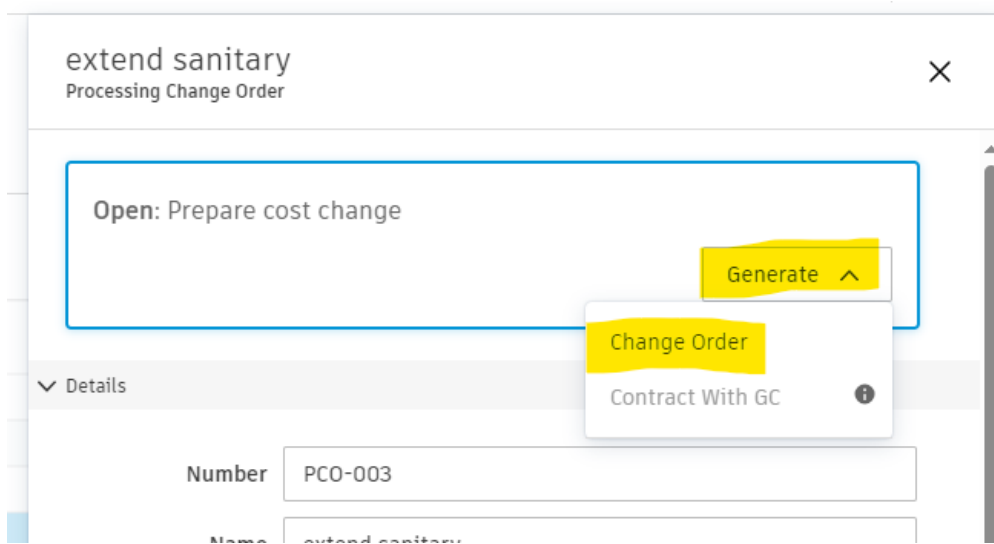
**Important: wait for blue wheel next to filename to finish spinning before proceeding.**



**The appearance of the PDF icon indicates successful upload of the attachment.**



Scroll up to the top of the flyout. Select **Generate > Change Order**



**IMPORTANT:** Failure to correctly attach the 1 exported file and only the 1 exported file will result in an error message. The error message is communicated by the name of the generated Change Order. Any erroneous Change Orders must be deleted and recreated, the next time following the instructions.

Upon Creation of the Change Order, ACC will switch to the Change Order Tab. Click *Set as Open*. A Workato Recipe will automatically analyze and then set all Open COs as BPW or non-BPW. **Never manually input data into the Type column.**

Before setting to Open						After setting to open and Workato setting the type																																																																	
<p>Change Orders</p> <p>Change Order Request Processing Change Order <u>Change Order</u></p> <table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Number ^</th> <th>Name</th> <th>Status</th> <th>Committed</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td colspan="4">Expand   Collapse</td> <td>89,778.17</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>&gt; CO-004</td> <td>COR-022 thru 025</td> <td>Executed</td> <td>25,001.29</td> <td>BPW</td> </tr> <tr> <td><input type="checkbox"/></td> <td>&gt; CO-005</td> <td>COR-26 through COR-30</td> <td>Executed</td> <td>4,223.09</td> <td>Non-BPW</td> </tr> <tr> <td><input type="checkbox"/></td> <td>&gt; CO-006</td> <td>COR-32</td> <td>Draft</td> <td>926.52</td> <td></td> </tr> </tbody> </table>						<input type="checkbox"/>	Number ^	Name	Status	Committed	Type	Expand   Collapse				89,778.17		<input type="checkbox"/>	> CO-004	COR-022 thru 025	Executed	25,001.29	BPW	<input type="checkbox"/>	> CO-005	COR-26 through COR-30	Executed	4,223.09	Non-BPW	<input type="checkbox"/>	> CO-006	COR-32	Draft	926.52		<p>Change Orders</p> <p>Change Order Request Processing Change Order <u>Change Order</u></p> <table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Number ^</th> <th>Name</th> <th>Status</th> <th>Committed</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td colspan="4">Expand   Collapse</td> <td>89,778.17</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>&gt; CO-004</td> <td>COR-022 thru 025</td> <td>Executed</td> <td>25,001.29</td> <td>BPW</td> </tr> <tr> <td><input type="checkbox"/></td> <td>&gt; CO-005</td> <td>COR-26 through COR-30</td> <td>Executed</td> <td>4,223.09</td> <td>Non-BPW</td> </tr> <tr> <td><input type="checkbox"/></td> <td>&gt; CO-006</td> <td>COR-32</td> <td>Open</td> <td>926.52</td> <td>Non-BPW</td> </tr> </tbody> </table>						<input type="checkbox"/>	Number ^	Name	Status	Committed	Type	Expand   Collapse				89,778.17		<input type="checkbox"/>	> CO-004	COR-022 thru 025	Executed	25,001.29	BPW	<input type="checkbox"/>	> CO-005	COR-26 through COR-30	Executed	4,223.09	Non-BPW	<input type="checkbox"/>	> CO-006	COR-32	Open	926.52	Non-BPW
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<input type="checkbox"/>	> CO-006	COR-32	Open	926.52	Non-BPW																																																																		

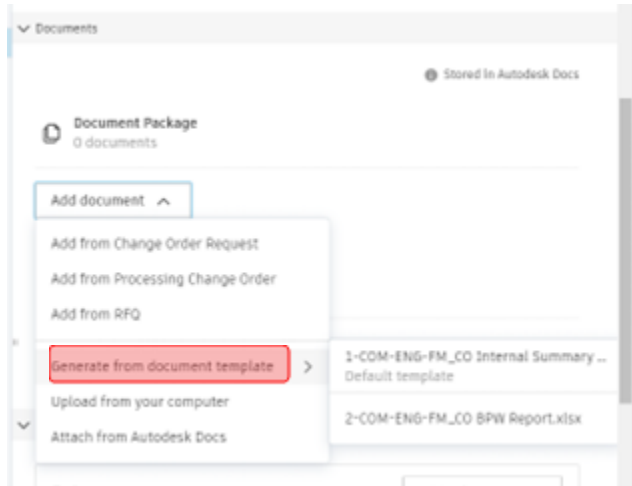
Click blue text for name of CO to bring up flyout.

**2024 09-16 Update: Do not input anything for BPW Meeting**

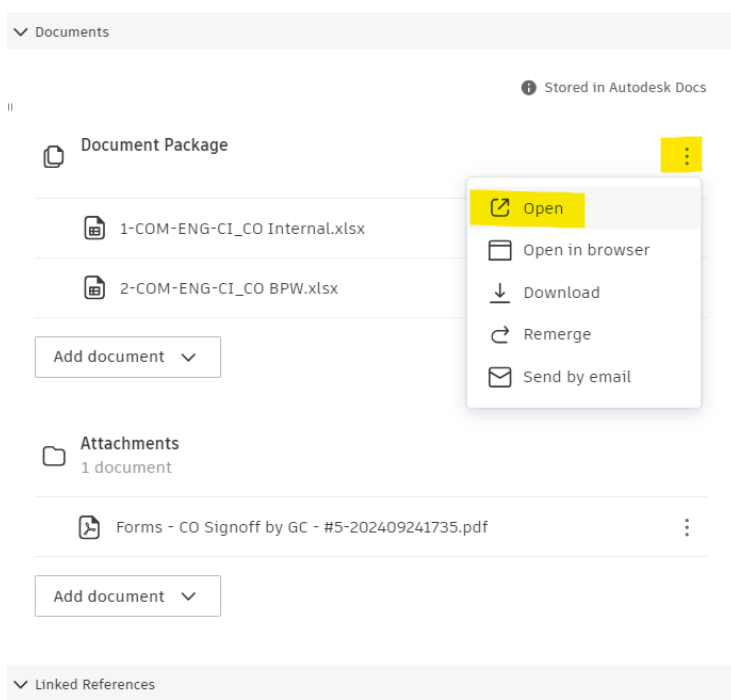
**Do not change *New End Date by CO*. It is automatically filled by an automation based off PCO value.**

The screenshot shows a web interface for a Change Order (COR-032). At the top, there is a header with 'COR-032 Change Order' and a close button. Below this is a 'References' section with an 'Add references' dropdown. A 'Forms' section contains a 'CO Signoff by GC #12' entry dated 'Jun 29, 2023' with a 'Closed' status. A navigation menu on the left includes 'Markup Summary', 'Approval', 'Tax', 'Dates', 'Custom Attributes', and 'Notes'. The 'Custom Attributes' section is expanded, showing a 'BPW Meeting' field with a calendar icon. Below it is a 'Schedule Change Explanation' field containing the text 'Supply chain delays'. A list of checkboxes follows: 'TY\_Street', 'TY\_Sewer-Sanitary', 'TY\_Sewer-Storm', 'TY\_Water', 'TY\_TE-Electrical', 'TY\_Parks', and 'TY\_Facilities' (which is checked). At the bottom of this section is a 'New End Date by CO' field with a calendar icon and the date 'Sep 30, 2023'. A red rectangular box highlights the 'BPW Meeting', 'Schedule Change Explanation', the list of checkboxes, and the 'New End Date by CO' field.

After entering in Custom Attributes Data, scroll back up to Documents Package. Create Document package as shown below. Very similar to the process for the PCO. Note that the document package will not reflect any data modifications after its creation. Always create 1-COM-ENG-FM\_CO Internal.xlsx template. For BPW type COs, also create 2-COM-ENG-FM\_CO BPW.xlsx. **Do not edit these files-instead, change custom attributes and then regenerate to update XLSX files.**



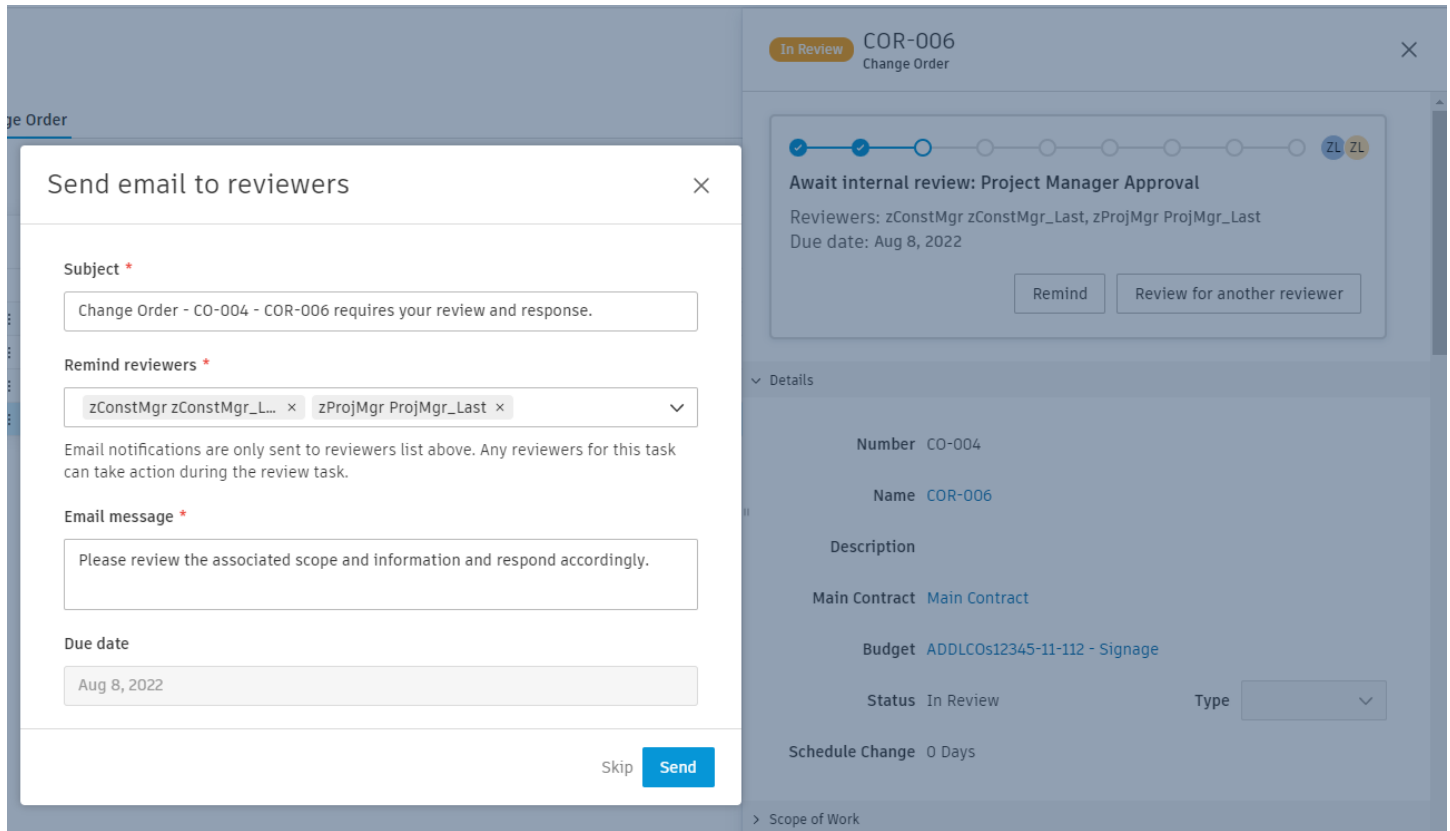
Click 3 dots at top level next to document package to open to PDF



**TIP:** If you need to change custom attributes or COR justification data or anything else, need to also update the Document Package. Click the triple vertical dot icon next to the Justification file and select Regenerate. You will also need to reopen the Document Package for the changes to be reflected on the document reviewed by staff. A new version will also be created.

### 7. Cost Management-City Staff review Change Order

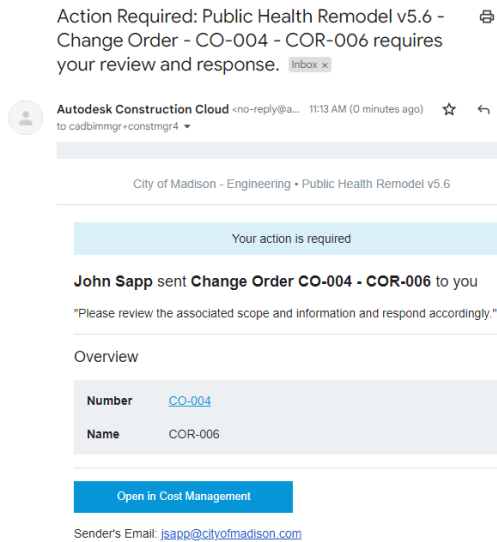
Click blue *Send* button in the upper right of the flyout. A pop up to *Send email to reviewers* will appear. Hit *Send* to start the review process.



Now the Change order will work through the Change Order Approval Workflow. It is a series of 3 (Non-BPW COs) or 5 (BPW COs) steps, some of which have multiple reviewers able to complete the review on a first come first serve basis. The Change Order will be listed as *Await Internal review: **Step name*** where **Step name** is the custom name given on the Change order approval workflow. The next reviewer in line is also listed.

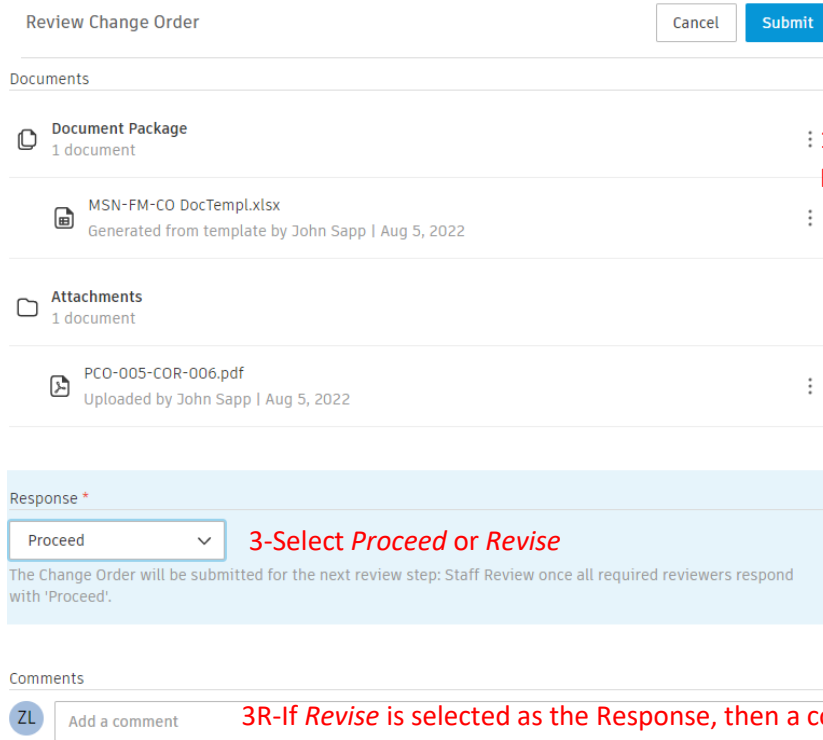


The process is nearly identical for each step, so just one Approval step is shown in this guide.



<Sample of Email. Review staff would follow link via blue *Open in Cost Management* button

**Clicking review in ACC will bring up this window**



4- Submit after selecting *Response*

1- Select *Open* to view Document Package PDF in the system

2- Select *Open* to view Attachments PDF in the system

3-Select *Proceed* or *Revise*

3R-If *Revise* is selected as the Response, then a comment must be provided prior to *Submit*. **Note that this will reset entire review process. It is best to first use @functionality in the flyout similar to forms to resolve any issues**

After completion of staff review, an email is generated and sent to contractor with a link to the document package and the change order in ACC.

Do not execute the change order after you receive the notice that it is sent. **Only City Engineering's accountant should set the Change Order as executed only after it has been executed in MUNIS**