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

## **Facilities Management**

## Advanced Change Order Process

### Table of Contents

1.	During PCO review with Contractor, the contractor will not sign and you need to redo PCO	. 2
2.	After PCO signoff by Contractor, you need to change account numbers but not item Qtys or bid prices	.4
3. sit	After PCO signoff by GC, or during internal review, need to change due to issue with Cost or Schedule. This includes uations such as the Board of Public Works rejecting a CO	.6
4.	During CO internal review, reviewer selects Revise because more justification is needed.	.7

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

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

Forms CO Signoff by GC			In review 🛛 🖄 Export
Basic Information	Last synced today at 11:42 AM		
1. CO Acceptance by GC Notes	Form is in review 1 reviewer needs to sign		Send back to editors Sign and submit
	Form Details		
	Form date Sep 11, 2024	Location	
	ID #35	Due date	
	Description PCO-003		
	Created by zzz COM-ENG-ADSK Automation		
	Last updated Sep 11, 2024		
	Visible to 10 members		
	References (1)		
	✓ Files (1)		
	PCO-003.pdf		

### Open the form. Select Discard

Forms CO Signoff by GC			In progress	Copy & Export :
Basic Information	Last synced today at 11:43 AM			
1. CO Acceptance by GC	Form Details			
Notes	Form date          ID       #35         Assigned to       V         COM-ENG-CONST MGR       V         Description       PCO-003         Visible to 9 members       V	Location Select a location Due date Select date	~	*
	References (1)       Piles (1)       PCO-003.pdf			Add references 🗸

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

Forms CO Signoff by GC	In progress D Copy C Export :
Basic Information	Last synced today at 11:45 AM
1. CO Acceptance by GC	Notes
Notes	https://acc.autodesk.com/cost/changeorder/projects/e6f4a02d-d237-400c-8082-bb410aca6332/changeorders/pco?preview=3852c956-fiec- 45ec-9b1a-74412b6679a8

### Delete PCO but **do not delete CORs.**

Cost Management	TEST-Olin Park	Facility Improvements-CONS 🧃	<u>8</u> •		
ல் Home	Change Or	ders			
Budget	5				
Cost	Change Order Reques	st PCO CO			
Change Orders	Cost change 🗸	Void			
Forecast	Number 🗸	Name		Cost St	
Files	Expand   Collaps	se			
Reports	PCO-010	COR-024,025	:	• Open	
	> PCO-009	COR-018-021	;	• Open	
Members	> PCO-008	COR-009, 011-014, 016, 017	1	• Execut	
S	> PCO-007	COR-015	:	• Execut	
Delete PC	D-010 - COR-C	)24,025	wel	12	×
If you delete the Change Order Red	PCO only, Change Order quest page.	Request and markups wil	l stil	l exist on the	

**IMPORTANT:** Only the justification data of a COR can be changed. After a form has been closed and signed, the only way to change cost data is to do a new COR.

Follow the instruction in the regular guide to have the contractor resubmit a COR by GC form.

# 2. 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. If In Review, the CO must be revised by a reviewer or project admin.

Cost Management 👻	TEST-Olin Park F	acility Improvements-CONS	ē •			
Home	Change Org	lers				
Budget	enange en					
Cost	Change Order Request	PCO CO				
Change Orders	Send Delete					
Forecast	- Number 个	Name		Status	Committe d	Ту
Files	Expand   Collapse				356,590.13	
Reports	> CO-001	COR-022,023	:	Executed	34,281.56	BF
	> CO-002	COR-004	:	Executed	11,526.01	N
Members	> CO-003	COR-007	:	Executed	6,378.01	N
Settings	> CO-004	COR-006	:	Executed	34,673.01	BF
	> CO-005	COR-008	:	Executed	13,748.00	N
	> CO-006	COR-010	:	Executed	0.00	BF
	> CO-007	COR-015	:	Executed	140,642.00	BF
	> CO-008	COR-009, 011-014, 016, 017	:	Executed	98,667.13	BF
	> CO-009	COR-018-021	1	Open	16,674.42	BF

Select new budgets for COR items. Be sure that costs are not changing. In this example, we want to swap a budget to Solar PV. First, navigate to the COR on the Change Order Request tab:

Cost Management +	TEST-Olin Park Facility Improvements-CONS 💩 👻									
Home	Change Orders									
ि cost	Change Order Request PCO CO					Exp				
Change Orders	+ Add					∨ Det				
Forecast	□ Num ↑ Name		Cost Status	Budget Code Committed	PC0 🔞					
Files				434,957.97						
2 Reports	COR-003 COR-003-Additional scope associated with MFD	:	• Draft	BID_12856-51-140 36,913.00						
	COR-004 COR-004-Duct Cleaning w/Liner	:	• Executed	BID_12856-51-140 11,526.01	PCO-0					
Q Members	COR-005 COR-005-AHU Updates	:	• Draft	BID_12856-51-140 29,701.99						
Settings	COR-006 COR-006-CB1 MFD Revisions	:	• Executed	BID_12856-51-140 34,673.01	PCO-0					
	COR-007 COR-007-MGE Payment	:	• Executed	BID_12856-51-140 6,378.01	PCO-0					
	COR-008 COR-008-CB3 Doors and Hardware	:	• Executed	BID_12856-51-140 13,748.00	PCO-0					
	COR-009 COR-009-Water Service (T&M w/ROM) - FINAL	:	• Executed	BID_12856-51-140 (8,905.00)	PCO-0					
	COR-010 COR-010-Contract Extention - Elect, HVAC, & Door Procureme	:	• Executed	BID_12856-51-140 0.00	PCO-0					
	COR-011 COR-011-RFI 57, 71, & 82	:	• Executed	BID_12856-51-140 6,253.00	PCO-0					
	COR-012 COR-012-RFI 55	:	• Executed	BID_12856-51-140 8,560.36	PCO-0					
	COR-013 COR-013-RFI 56	:	• Executed	BID_12856-51-140 1,029.75	PCO-0					
	COR-014 COR-014-CB2 AHU Updates	:	• Executed	BID_12856-51-140 21,613.01	PCO-0					
	COR-015 COR-015-Solar Installation	:	• Executed	BID_12856-51-140 140,642.00	PCO-0					
	COR-016 COR-016-CB6 MEPTF Changes	;	• Executed	BID_12856-51-140 66,602.00	PCO-0					
	COR-017 COR-017-RFI 33 & 43	:	• Executed	BID_12856-51-140 3,514.00	PCO-0					
	COR-018 COR-018-RFI 95 Roof Trim Finish	÷	• Open	Search by budge ^ 1,122.00	PCO-0					
	COR-019 COR-019-CB7 Architectural Changes	:	• Open	ADL_12314-10-486 - Solar PV		01				
	COR-020 COR-020-RFI 86 West Subpanels	:	• Open	BID 12856-51-140 - Base Bid for Const	truction	1				
	COR-021 COR-021-RFI 102 Dock Window	:	• Open			- 2				
	COR-022 COR-022-Owner Move T and M	:	• Executed	Create new budget						
	COR-023 COR-023-Water Service (T&M w/ROM)	:	• Executed	Group by budget code segment						
	COR DOY COR DOY Flowers Cord Booder		. Dejected	DID 10024 E1 1/0 1 100 00						

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

Close details panel. Click 3 dots next to PCO name (COR-018-021). Select Cost Change > Generate CO

- coot nanagement	TEST-Olin Park Fa	cility Improvements-CONS	•				
Home	Change Ord	ers					
Cost	Change Order Request	PCO CO					
Change Orders	+ Add ~						
Forecast	Number ↑	Name		Cost Status	Committed	New End Date by PCC	Budget Name
Files	Expand   Collapse				356,590.13		
∠ Reports	> PCO-001	COR-022,023	:	• Executed	34,281.56		
-	> PCO-002	COR-004	:	• Executed	11,526.01		
Members	> PCO-003	COR-007	:	• Executed	6,378.01		
Settings	> PCO-004	COR-006	:	<ul> <li>Executed</li> </ul>	34,673.01		
	> PCO-005	COR-008	:	• Executed	13,748.00		
	> PCO-006	COR-010	:	<ul> <li>Executed</li> </ul>	0.00	Aug 19, 2023	
	> PCO-007	COR-015	:	<ul> <li>Executed</li> </ul>	140,642.00		
	> PCO-008	COR-009, 011-014, 016, 017	:	<ul> <li>Executed</li> </ul>	98,667.13		
	> PCO-009	COR-018-021	0 :	• Open	16,674.42	-	
			C	D Cost change		>	→ Generate CO
				🕂 Add Change	Order Reques	st	→ Generate Contract With GC
				+ Batch create	Change Orde	r Request	
			¢	🖌 Add markup		>	
			(	Void			

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

City of Madison Engineering-Facilities Management ACC Guide-Advanced Change Order process October 10, 2024 <u>3. After PCO signoff by GC, or during internal review, need to change due to issue with Cost or</u> <u>Schedule. This includes situations such as the Board of Public Works rejecting a CO</u>

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** 

Review CO		Cancel Submit
	o uocaments	^
	Add document 🗸	
	Response *	
	The CO will be sent back in the Open status.	
	Comments *	
	Need to renoglate lower unit cost for sanitary tap	
	✓ Restricted ●	

#### Delete PCO but **do not delete CORs.**

**IMPORTANT:** Only the justification data of a COR can be changed. After a form has been closed and signed, the only way to change cost data is to do a new COR.

Follow the instruction in the regular guide to have the contractor resubmit a COR by GC form.

## City of Madison Engineering-Facilities ManagementACC Guide-Advanced Change Order processOctober 10, 20244. During CO internal review, reviewer selects Revise because more justification is needed.

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

eview CO			Cancel	Submit
	Documents			
	Document Package 1 document   Merged to CO-003.pdf	:		
	1-COM-ENG-CI_CO Internal.xlsx	÷		
	Add document 🗸			
	C Attachments 0 documents			
	Add document 🗸			
	Response *			
	Revise The CO will be sent back in the Open status.			
	Comments *			
	Not enough explanation, why is the sanitary tap charged to storm account?			
	Restricted 💿			

Construction Manager will get a notice of the Revise response. Examine comment. Got to Change Order Request tab and update *CO Just. Comments-CPM/CCM* as needed.

A Distance														
N Home	Change	Change Orders COR-025-Existing Elect							ting Electrical Condition					
Budget														
D Cost	Change Order	Request PCO CO					Expand   Collapse					20		
	1. 644						10,5	63.84	_		10,563.84			
Change Orders	T Add						Number	Name	Qty	Unit	Unit Cost	6		
Norecast	□ Num ↑	Name		Cost	Budget Code	0 @	Expa   Collap							
Files				otatao			COR-025	COR-025-Exi	1	ls	10,563.84	1		
Poporte	COR-003	COR-003-Additional scope associated with MFD	:	• Draft	BID_12856-51-140							•		
J Reports	COR-004	COR-004-Duct Cleaning w/Liner	1	• Executed	BID_12856-51-140		Eg Define hierard	chy 🗸						
8 Members	COR-005	COR-005-AHU Updates	;	• Draft	BID_12856-51-140									
Settings	COR-006	COR+006-CB1 MFD Revisions	:	• Executed	BID_12856-51-140		> Markups							
,	COR-007	COR+007-MGE Payment	1	• Executed	BID_12856-51-140		> Scope of Work							
	COR-008	COR-008-CB3 Doors and Hardware	:	• Executed	BID_12856-51-140		> Approval							
	COR-009	COR-009-Water Service (T&M w/ROM) - FINAL	:	• Executed	BID_12856-51-140		> Dates							
	COR-010	COR-010-Contract Extention - Elect, HVAC, & Door Procureme	:	• Executed	BID_12856-51-140		✓ Custom Attributes					:		
	COR-011	COR-011-RFI 57, 71, & 82	:	• Executed	BID_12856-51-140									
	COR-012	COR-012-RFI 55	1	• Executed	BID_12856-51-140		N/B	3 _				~		
	COR-013	COR-013-RFI 56	:	• Executed	BID_12856-51-140									
	COR-014	COR-014-CB2 AHU Updates	1	• Executed	BID_12856-51-140		CO Just. Comments CPM/CCM	Existing Elect	rical panel	undersized.				
	COR-015	COR-015-Solar Installation	:	• Executed	BID_12856-51-140									
	COR-016	COR+016+CB6 MEPTF Changes	1	• Executed	BID_12856-51-140		Actual vs Estimated							
	COR-017	COR-017-RFI 33 & 43	:	• Executed	BID_12856-51-140		quantities unite							
	COR-018	COR-018-RFI 95 Roof Trim Finish	:	• Open	BID_12856-51-140		Missing Bid Item or							
	COR-019	COR-019-CB7 Architectural Changes	:	• Open	BID_12856-51-140		Additional Bid Item needed	1						
	COR-020	COR-020-RFI 86 West Subpanels	:	• Open	BID_12856-51-140									
	COR-021	COR-021-RFI 102 Dock Window	÷	• Open	BID_12856-51-140		Field Decision							
	COR-022	COR-022-Owner Move T and M	:	• Executed	BID_12856-51-140		(Expanded Scope)	)						
	COR-023	COR-023-Water Service (T&M w/ROM)	1	<ul> <li>Executed</li> </ul>	BID_12856-51-140		Differing site							
	COR-024	COR-024-Elevator Card Reader	1	<ul> <li>Rejected</li> </ul>	BID_12856-51-140		conditions	2						
	COR-025	COR+025-Existing Electrical Condition	;	Rejected	BID_12856-51-140		Design did not	t						

Go back to CO tab. Scroll to Documents section. Regenerate XLSX:

7 Documents	
	Stored in Autodesk Docs
Document Package 1 document   Merged to CO-003.pdf	:
1-COM-ENG-CI_CO Internal.xlsx	-
Add document v Attachments O documents	🖸 Open
	↓ Download >
	C Regenerate
	↑ Move up
Add document 🗸	↓ Move down
	Move to Attachments
	🔟 Delete
' Linked References	🖉 Rename

### Open to PDF:

ben
oen in browser
ownload
emerge
nd by email

View PDF to verify that everything is good.

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

	extend sanitary co	×
	Expand   Collapse	<b>©</b>
JS 🔞	Prepare Change Orders	Send
cut	✓ Details	
n	Number CO-003	