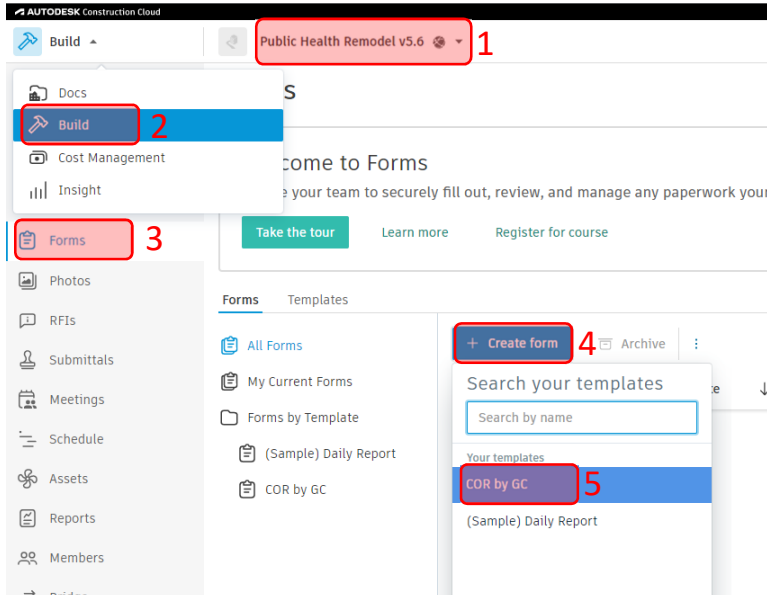


# Autodesk Construction Cloud (ACC) Guide-Change Order Process

## Build-GC by COR form by Contractor

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*



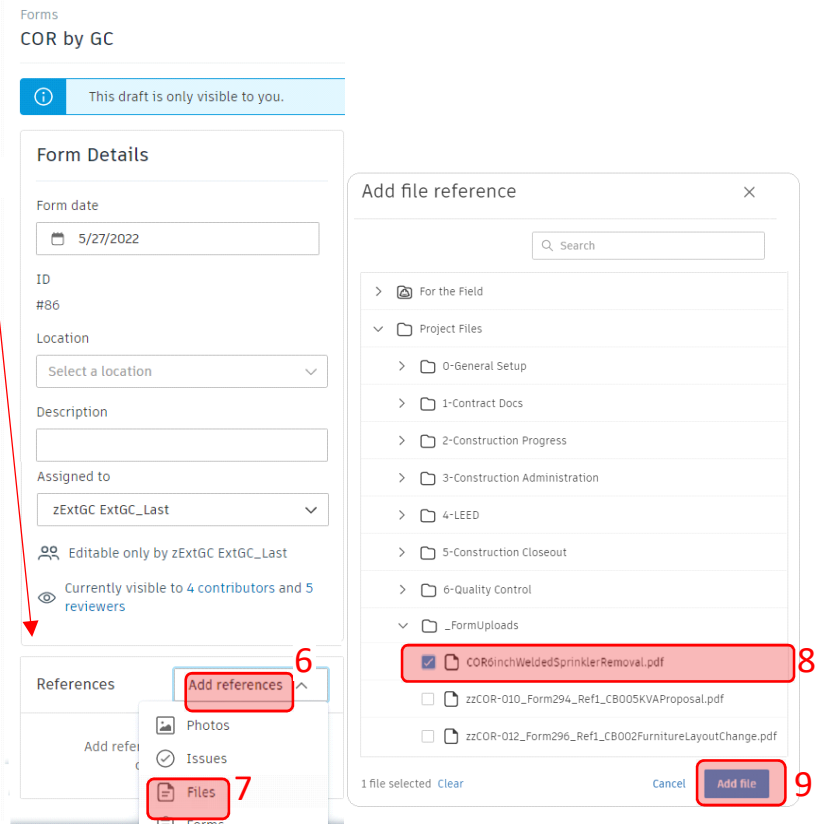
Fill out form per instructions on form, copied below. **Steps 1-4 of Form**

- Instructions to General Contractor:**
1. Open new browser tab or window to *Files* tab. Upload PDFs documenting COR costs to folder *\_Form Uploads*
  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 green, 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 *\_FormUploads* 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 *\_FormUploads* 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.

Comments

Activity

Download PDF Replace PDF

Discard changes Save

Form date  
8/4/2022

ID  
#179

Location  
Select a location

Description

**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.

### Build-GC by COR form by Construction Manager

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.

### 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), *CO Just. Comments-CPM/CCM* (Change Order Justification Comments by City Project Manager and City Construction Manager), and *Sched. Change Explan.* (Schedule Change Explanation)

Change Orders

Change Order Request Processing Change Order Change Order

+ Add

Export Filter Default view

Number	Name	Cost Status	Budget Code	Committed	Processing...	Change Order	Type	N/B	CO Just. Comments-CPM/CCM	Sched. Change Explan.	
				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	926.52			Cont Ext Requi...	N	Unforseen stakeholder needs that were uncovered during constru...	

- ADL\_12348-45-151 - Paving
- BID\_11111-1414-11 - Chip Sealing East
- BID\_12345-67-890 - Base Construction Contract** ✓
- BID\_12346-15-484-00012 - Solar
- BID\_12347-54-45 - Signage
- BID\_12348-15-154 - Landscaping
- Create new budget
- Group by budget code segment

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

- 
- 

Add document

**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

*Continued...*

<Previously entered

<Previously entered

> Related Change Orders

> Cost Summary

> Markups

> Scope of Work

> Approval

> Dates

Custom Attributes

N/B N

CO Just. Comments-CPM/CCM Unforeseen stakeholder needs that were uncovered during

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

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	Access	Change Order	Type	N/B	CO Just.
<input type="checkbox"/>	COR-030 COR-030-Relocate thermostats					
<input type="checkbox"/>	COR-031 COR-031-All work to shift wall layout to expand office 501					
<input type="checkbox"/>	COR-032 COR-032-Add power & data outlets in 3 conference rooms	Draft	926.52	Cont Ext Requ...	N	Unforseer

1

2 Assign

3 Processing Change Order

4 COR-032

5 Create option COR-032

6 Create and Assign

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

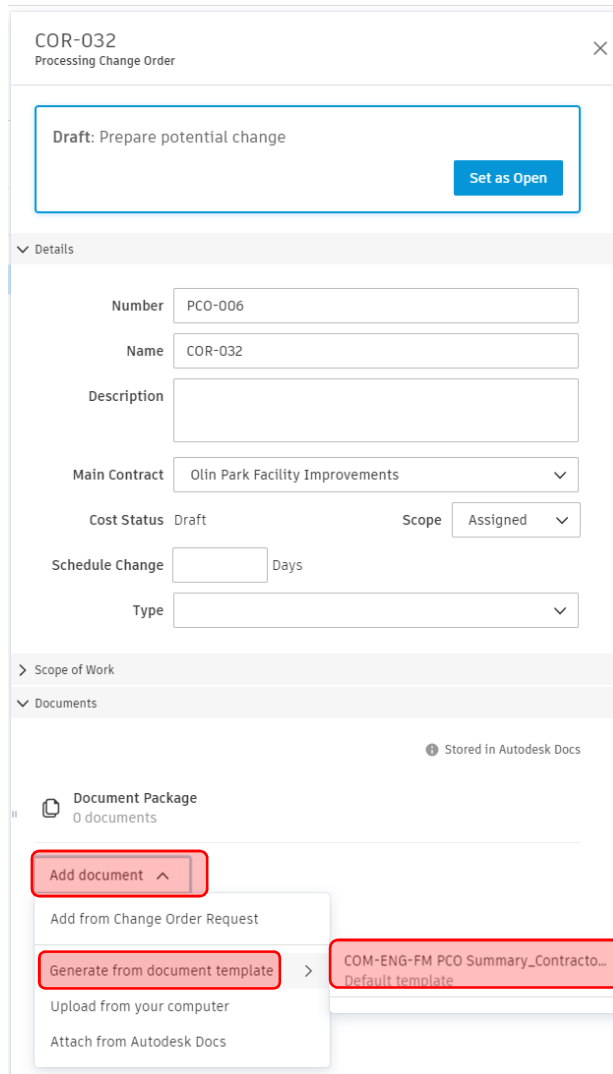
Creating a PCO switches tabs to *Processing Change Order*. Click arrow next to *PCO* to see *COR(s)*. Input *New End Date* if needed. This is the new contract end date as a result of this change order.

The screenshot shows the Autodesk Construction Cloud interface for 'Cost Management' under the project 'TEST-Olin Park Facility Improvements - CO...'. The 'Change Orders' section is active, showing a table of Change Order Requests. One entry, 'COR-032', is highlighted in blue. A red box highlights the 'Select date' button next to the 'New End Date by PCO' field. This button opens a calendar for June 2023, with the 29th selected.

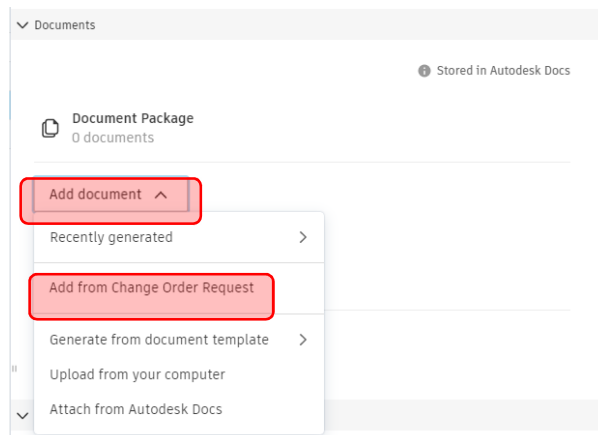
Number	Name	Cost Status	Committed	New End Date by PCO	Budget Name	C O
PCO-006	COR-032	Draft	926.52			

Calendar: June 2023. Selected date: 29.

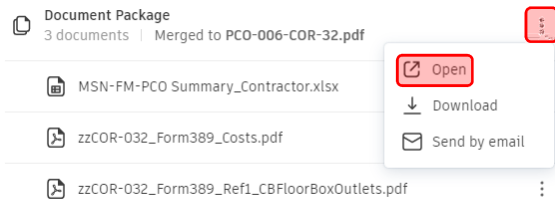
Click the name of the PCO to bring up the flyout. Under Documents, click *Add document* and then select *Generate from document template*. Select the only option.



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

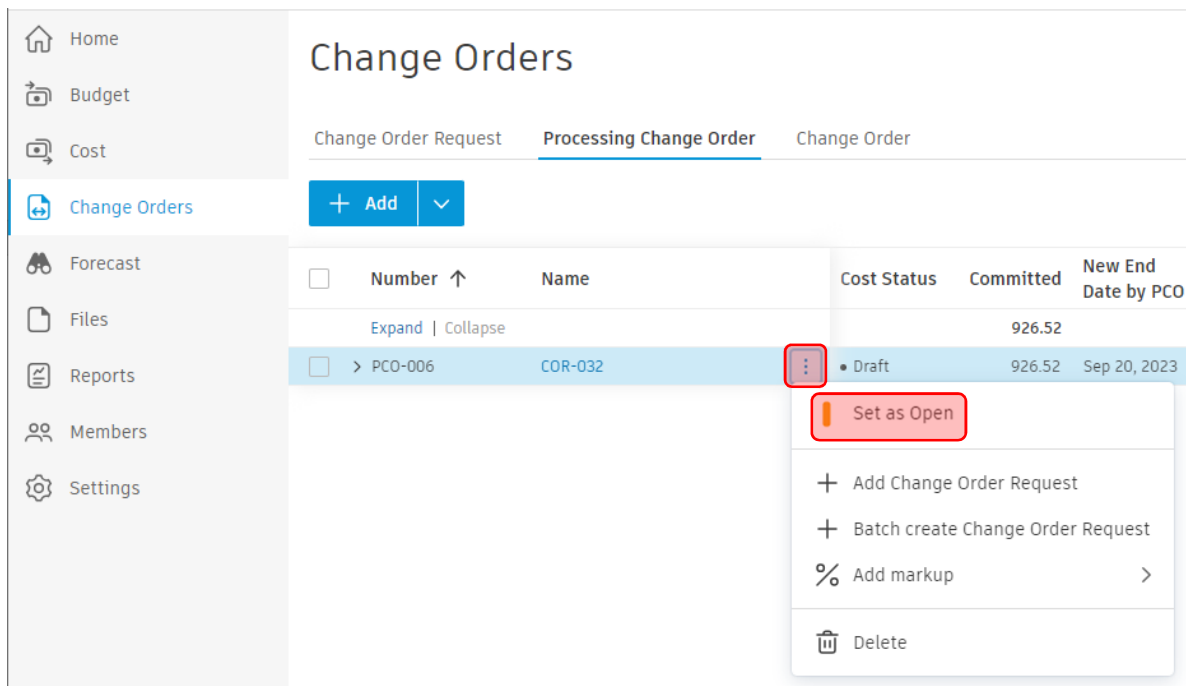


Open the document package to open the file that the contractor will review:



**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.

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



**IMPORTANT:** The action of setting a PCO to open and having an up-to-date merged document package 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.

The automation will create a *CO Signoff by GC* form, reference it to the PCO, reference the document package to the form, add a link to the PCO in the form notes, and finally send an email with further instructions once complete. If the email fails to send, the document package was not merged after its documents composing it were changed. In that case, you will have to Revise the PCO, remerge the files and then set to Open again.

Changes to data in the system aren't immediately populated—you must regenerate document template if anything is changed. Changes to data without remerging document would be visible on the Activity Log at bottom of flyout.



## Build-Construction Manager reviews CO Signoff by GC Form and submits to Contractor

Check your email and follow one of the two sets of actions. This guide will proceed with 1<sup>st</sup> set of actions which assumes everything is correct. Follow link to Form.

Action Required: CO Signoff by GC Form ID #12 was successfully created on - 8182-Public Health Remodel v5.6 - 17047

Inbox x COM-ENG-CONST MGR x



**Workato Notification** <mailer@workato.com>  
to cadbimmgr+com.eng.const\_mgr ▾

3:18 PM (0 minutes ago)

A CO Signoff by GC form was automatically generate and referenced to Processing Change Order PCO-006: COR-032.  
. The PCO's document package was also referenced to **Form #12**

Please follow the link to the form and verify the attached PCO document package. Then take one of two sets of actions

1. If correct, follow link to [Form #12](#) and submit form for the GC to review.
2. If incorrect,
  - 2A. Discard [Form #12](#).
  - 2B. Reject [PCO-006](#)
  - 2C. Delete document package.
  - 2D. Make changes in cost management, generate doc package, and set to open as you would normally.

-----  
This email was generated by Workato on behalf of City of Madison Engineering

Review the file referenced to the form. Submit to the Contractor for their review.

Build ▾ 8182-Public Health Remodel v5.6 zz COM Engineering Construction Manager ▾

Home Sheets Files Issues **Forms** Photos RFIs Submittals Meetings Correspondence Schedule Assets Reports Members Bridge

Forms  
**CO Signoff by GC** In progress Copy Export

Last synced today at 03:20 PM

**Form Details**

Form date  
6/29/2023 ▾

ID  
#12

Location  
Select a location ▾

Description  
PCO-006

Assigned to  
COM-ENG-CONST MGR ▾

Visible to 6 members

References Add references ▾

Files  
PCO-006.pdf

**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

Photos Issues Note

Discard Changes save automatically Submit

### Build-CO Signoff by GC form by Contractor

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

**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](#)

11 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](#)

**References**

Files

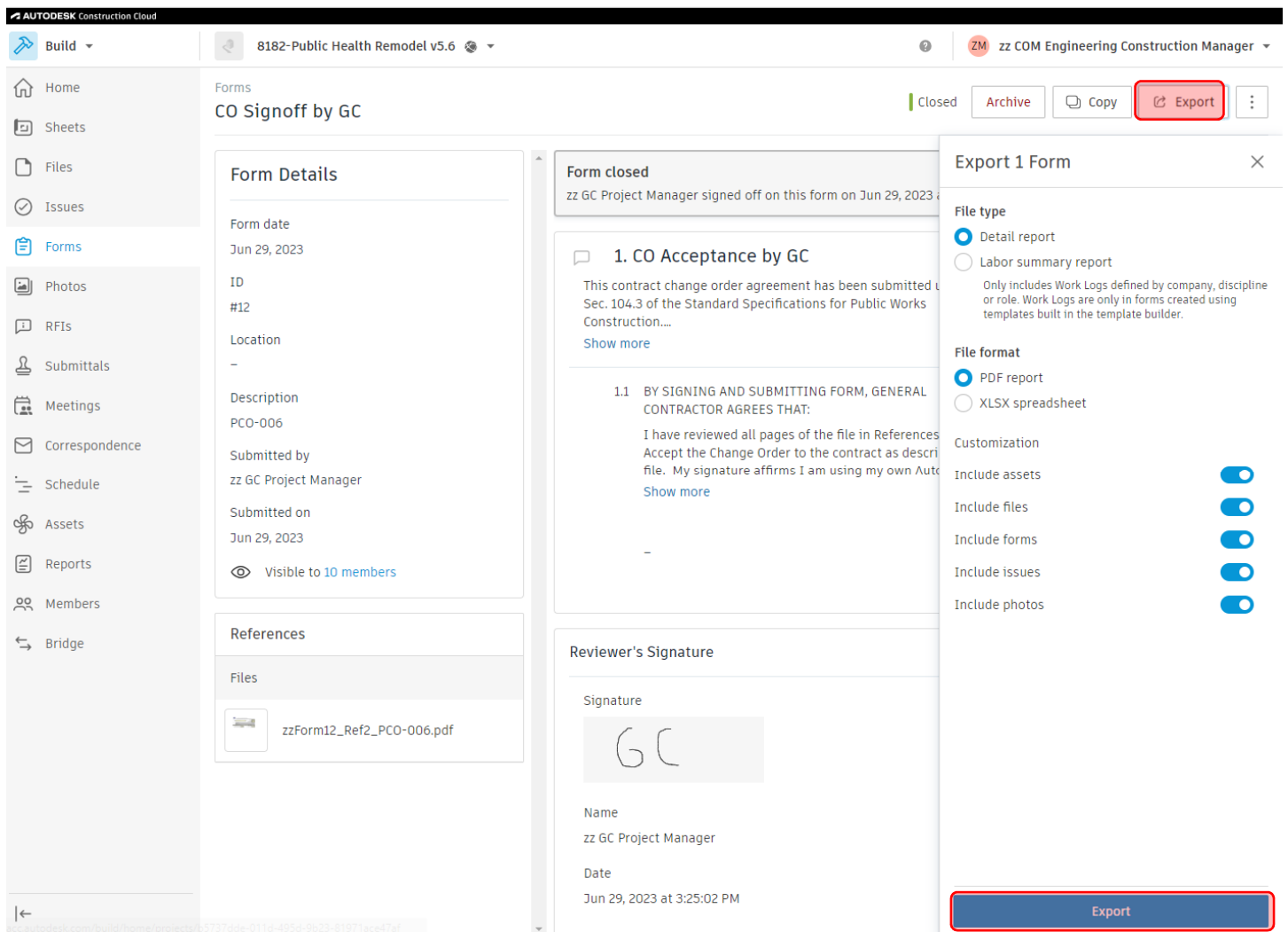
PCO-006.pdf

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

After the contractor has signed the *CO Signoff by GC form*, the Construction Manager will receive an Autodesk email immediately. It contains a link to the Form. You will also receive a Workato email within 5 minutes that contains a link to the corresponding PCO and Form. Follow the Form link in the Workato email

You will see that the form is closed and the GC has signed off.

First, open link to the Form. Export to PDF as shown. Leave default settings with everything toggled on.



Click Download. Open folder containing downloaded PDF.

Build 8182-Public Health Remodel v5.6

Forms  
CO Signoff by GC

**Form Details**

Form date  
Jun 29, 2023

ID  
#12

Location  
-

Description  
PCO-006

Submitted by  
zz GC Project Manager

Submitted on  
Jun 29, 2023

Visible to 10 members

**References**

Files

zzForm12\_Ref2\_PCO-006.pdf

**Form closed**  
zz GC Project Manager signed off on

**1. CO Acceptance by GC**

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

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

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

**Reviewer's Signature**

Signature  
GC

**Downloads**

- Form detail report-202306292034.pdf
- Form detail report-202306292033.pdf
- Form detail report-202306292031 (1).pdf
- Form detail report-202306292031.pdf

**Your export is complete**

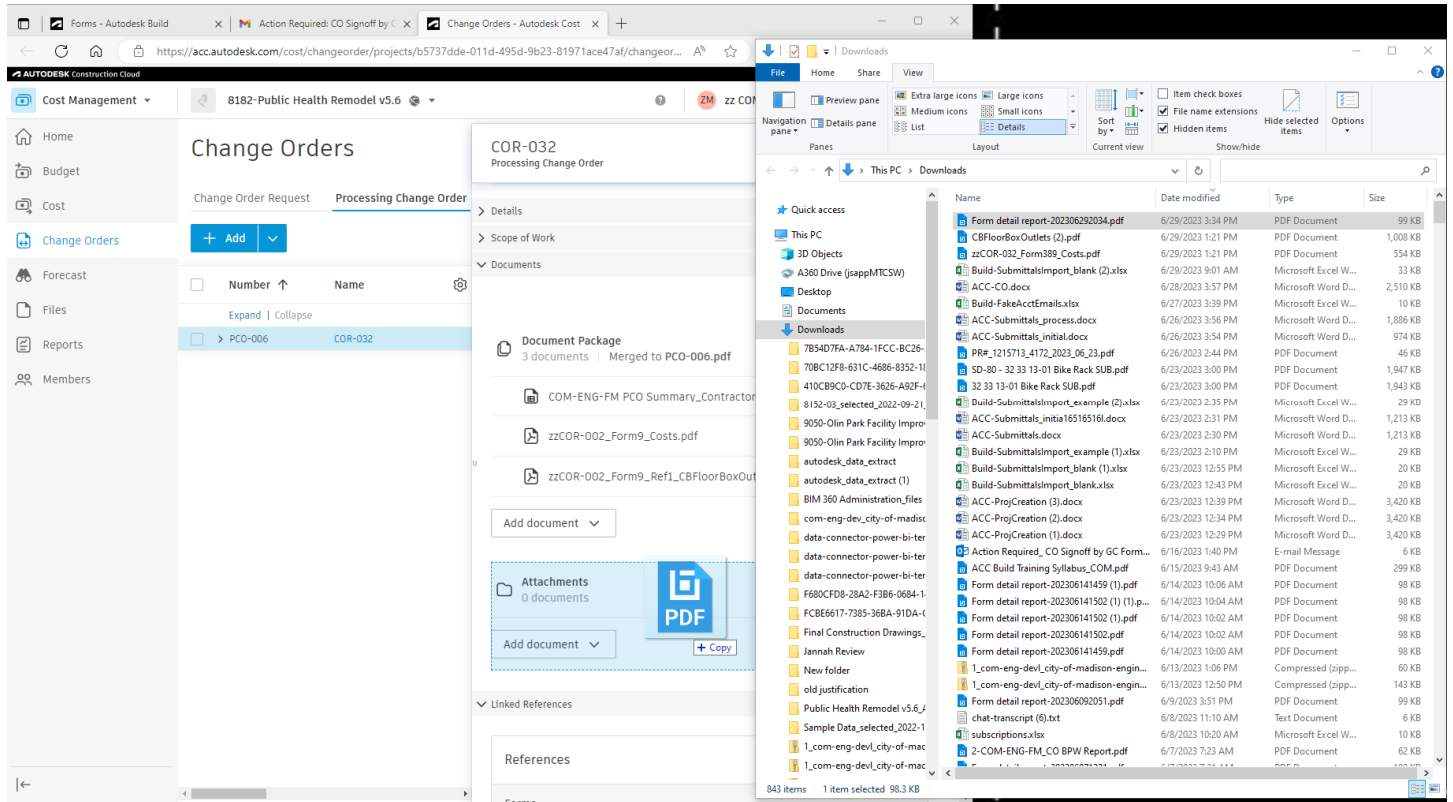
Share the link below, download the report directly, or email this report to others

Shareable link  
<https://developer.api.autodesk.com/repor>

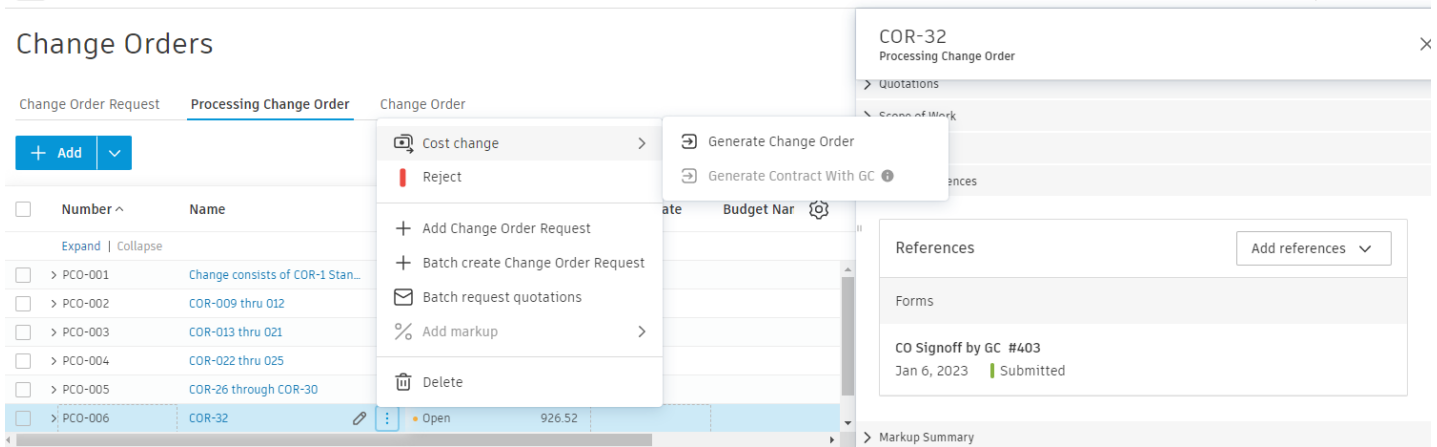
Email to (optional)

**Download**

Going back to original email, open link to PCO. Sort by date modified so that it is the top result. Drag and drop the downloaded file to the attachments section of the PCO.



Click the 3 vertical dots, select Cost change, and then Generate Change Order.



Upon Creation of the Change Order, ACC will switch to the Change Order Tab. Click *Set as Open*. A Workato Recipe looks every 5 minutes to analyze all Open COs as BPW or non-BPW. **Do not send a Change Order for review without Workato automatically setting the Type 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   <b>Change Order</b></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   <b>Change Order</b></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.

Scroll down in flyout to add data to Custom Attributes. Always select types. For BPW Change Orders like this one, select BPW Meeting date and provide a Schedule Change Explanation as needed. **Do not change *New End Date by CO*. It is automatically filled by an automation based off PCO value.**

Open
COR-032  
Change Order
✕

References Add references ▾

---

Forms

CO Signoff by GC #12  
Jun 29, 2023 Closed

> Markup Summary

> Approval

> Tax

> Dates

∨ Custom Attributes ⋮

BPW Meeting 📅 Jul 11, 2023

Schedule Change Explanation:

TY\_Street

TY\_Sewer-Sanitary

TY\_Sewer-Storm

TY\_Water

TY\_TE-Electrical

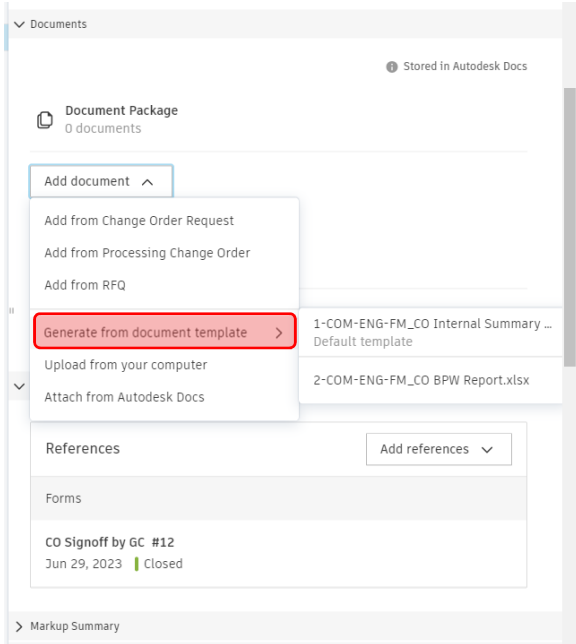
TY\_Parks

TY\_Facilities

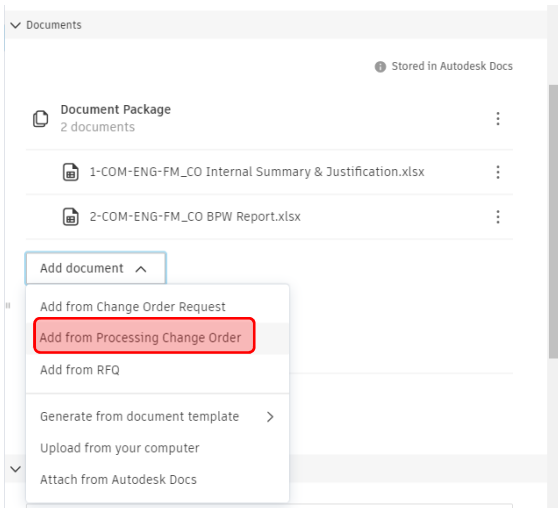
New End Date by CO 📅 Sep 30, 2023

∨ Notes

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 Summary.xlsx template. For BPW type COs, also create 2-COM-ENG-FM\_CO BPW Report.



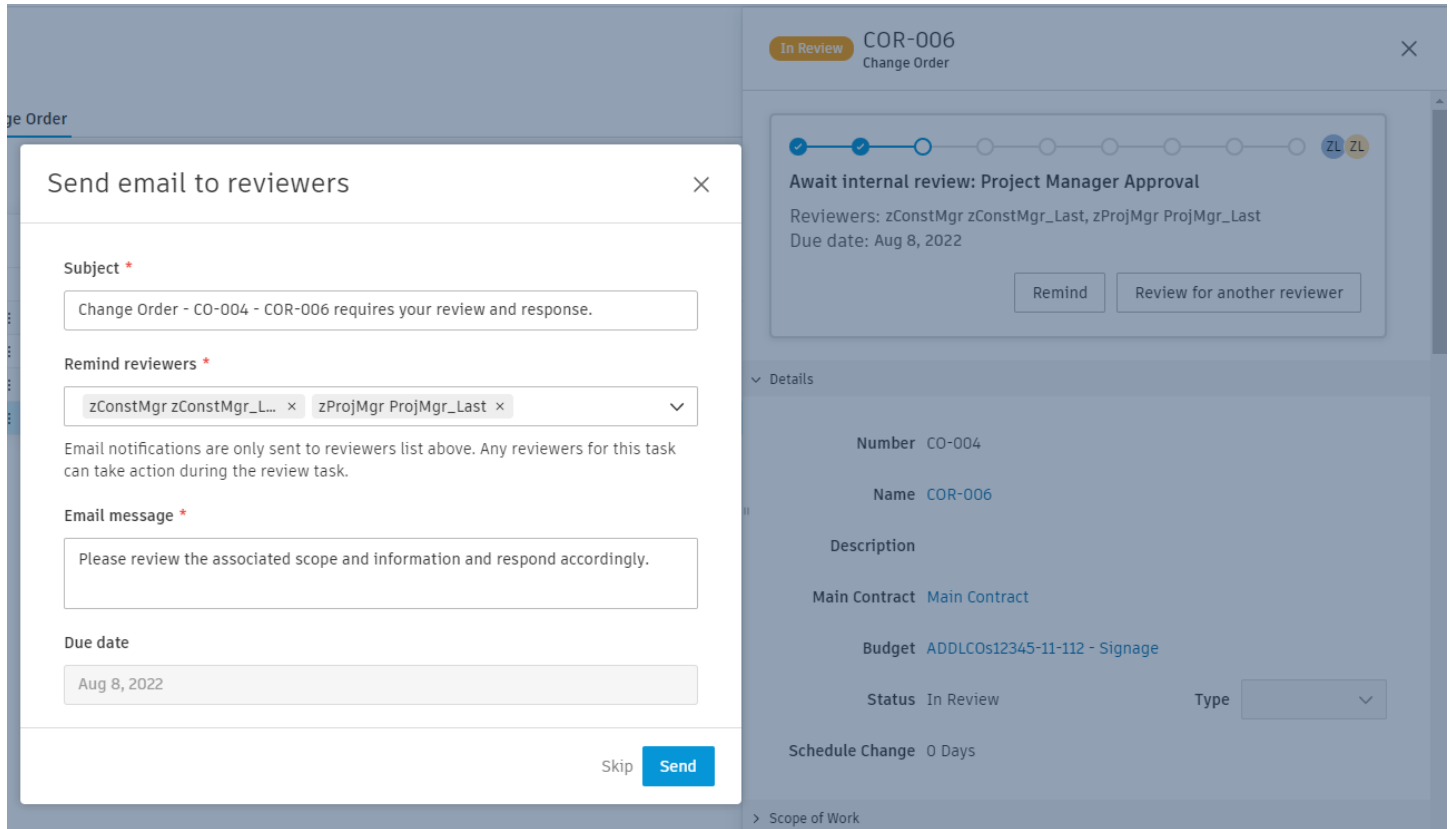
### Add from Processing Change Order



**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.

## Cost Management-City Staff review Change Order

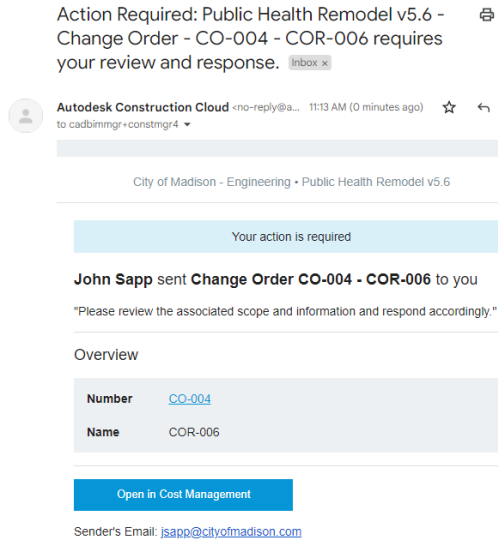
Click blue *Send* button in the upper right of the flyout. A pop up to *Send email to reviewers* will appear. Hit Send to start the review process.



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.

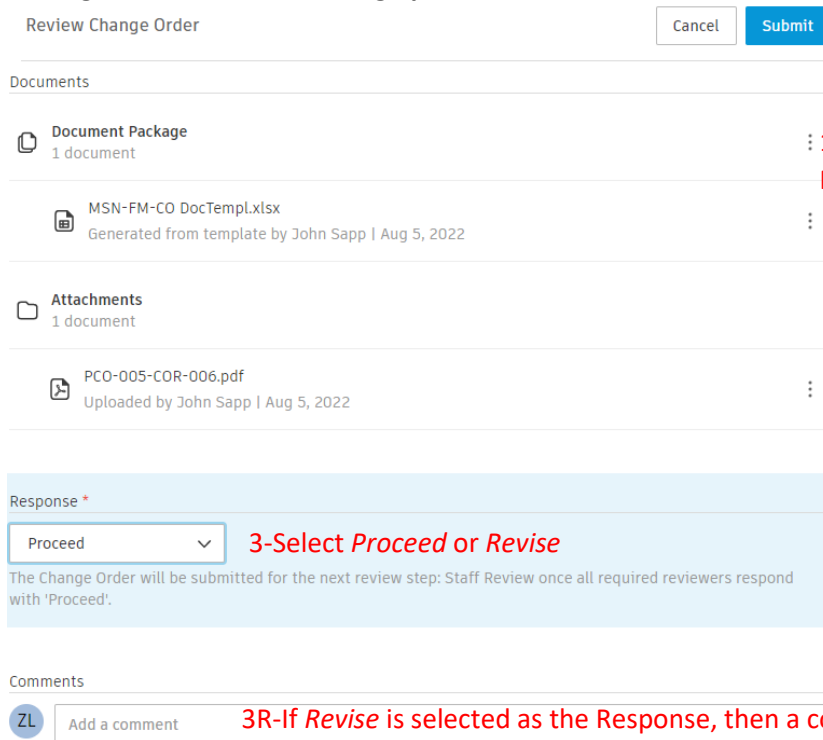
The process is nearly identical for each step, so just one Approval step is shown in this guide.





<Sample of Email. Construction Manager 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.

**The final step is for Accountant to set the Change Order as Executed. It will be recorded as such throughout the system. NOTE: only users with Project Admin status can undo a CO once Executed and the process is involved.**