Autodesk Construction Cloud (ACC) Guide-Change Order Process

Facilities Management

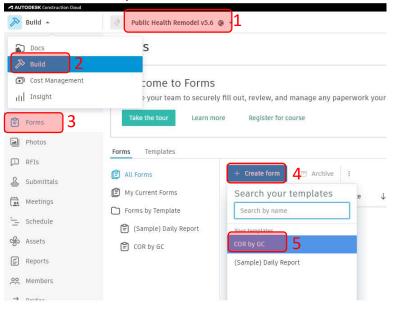
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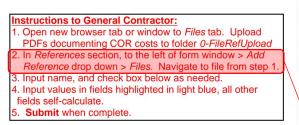
For entire process, see https://youtu.be/hrmQRMjR_Ms

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*

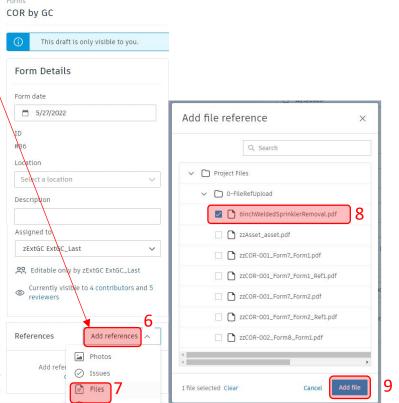


Fill out form per instructions on form, copied below. **Steps 1-4 of Form**



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 *O-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 *O-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																		0	ZL ZEXTGC	ExtGC.	_Last ¬	×
Forms COR by GC ① This draft is visible to reviewers.																I	Draft [Q ((opy 🛛 🖄 Ex	^{port}	:)1
Form date 8/4/2022	•	Q	Ð,	T	1	Þ	Download PDF	(n) Repla	e PDF										Activity Discard change	is S	ave	*
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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), *CO Just. Comments-CPM/CCM* (Change Order Justification Comments by City Project Manager and City Construction Manager), and *Sched. Change Explan.* (Schedule Change Explanation)

+	Add										C EX	sport 🗸 🖓	Default view	w v
	lumb r	Name		Cost Status	Budget Code	Committed	Processi ng	Change Order	Туре	N /B	CO Just. Comments-CPM/CCM	Sched.	Change Explan.	Ę
						111,892.78								
c	OR-027	COR-027-add outlet at data rack	:	• Executed		167.66	PCO-005	CO-005	No Cont Ext	в	Justification comments for COR-027			
C	OR-028	COR-028-Relocate existing pneumatic line	:	• Executed		1,955.94	PCO-005	CO-005	No Cont Ext	Ν	Justification comments for COR-028			
C	OR-029	COR-029-Change privacy rm countertops to 26" deep laminate	÷	• Executed		811.44	PCO-005	CO-005	No Cont Ext	Ν	Justification comments for COR-029			
C	OR-030	COR-030-Relocate thermostats	:	• Executed		338.55	PCO-005	CO-005	No Cont Ext	в	Justification comments for COR-030			
C	OR-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 l	ayout.		
0	OR-032	COR-032-Add power & data outlets in 3 conference rooms 🧷	÷	• Draft	キ へ	926.52			Cont Ext Requi	Ν	Unforseen stakeholder needs that were uncovered durin	ig constru		
					ADL_12	348-45-151 -	Paving							
					BID_11	111-1414-11	- Chip Seali	ng East						
					BID_12	345-67-890 -	Base Const	ruction Co	ntract 🧹					
					BID_12	346-15-484-0	0012 - Sola	ar						
					BID 12	347-54-45 - S	ionage							
					BID_12	348-15-154 -	Landscapin	ig						
					Create ne	w budget								
					Group hy	budget code se	ament							

COR-032-Add Change Order Request	power & data outlets in 3 conference roo	^{oms} ×	
✓ Details			NOTE: Many of the attributes visible in the flyout can also be
Number	COR-032		turned on by clicking the gear icon and then inputted in the table view However, there are some attribute
Name	COR-032-Add power & data outlets in 3 conference roo	oms	that can only be edited or viewed via the flyout.
Description	COR-032_Submit-20221201(1510+04)_FormID-389		<"Description" has auto-populated text for tracking purposes. For example, this was COR-032,
Budget	BID12345-67-890 - Base Construction Contract	~	Submitted December 1 st 2022 at 3:10:04 AM and Form ID #389
Main Contract	Main Contract		5.10.04 AW and 1011110 #505
Contract With GC	8152 - Public Health Remodel	\sim	
Supplier	Ext-GC1	~	
Cost Status	Draft Scope Assigned		
Schedule Change	0 Days		
Туре	Cont Ext Required	\sim	
Location	Select a location	~	
 Documents 			
	Stored in Autode	esk Docs	Open the attachments to confirm they are correct.
Attachments 2 documents			
ZZCOR-032	2_Form389_Costs.pdf	:	<pdf as="" form="" of="" submitted.<="" td=""></pdf>
ZZCOR-032	2_Form389_Ref1_CBFloorBoxOutlets.pdf	:	< File(s) attached to COR by GC by way of file reference
Add document 🗸	,		

See next page

	6 • • • •	
Cit	i of Madison	Engineering-Facilities Management
City		Engineering racinges Management

ACC Guide-Change Order process

February 23, 2024

>	 Related Change Orders 		Continued
>	Cost Summary		Continued
>	Markups		
>	 Scope of Work 		
>	> Approval		
>	Dates		
~	 Custom Attributes 	I.	<previously entered<="" td=""></previously>
	N/B	N Y	<previously entered<="" td=""></previously>
	CO Just.		
	Comments- CPM/CCM	Unforseen 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)		Select checkboxes to indicate justification for the Change Order
	Design Changes		

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 + Add	Request Processing Change Order Change Orde		Assign to Processing Change Order	×			
Numb er	Name	<mark>៥</mark> ខ្លួ Define hierarchy	cessi Chan . Orde		N /B CO Just.	Name*	
COR-030	COR-030-Relocate thermostats	Assign 2 >	Processing	Change Order	3 _{cati}		
COR-031	COR-031-All work to shift wall layout to expand office 501	U Delete	-006 CO-00	06 No Cont Ext	N Stakehold		
COR-032	COR-032-Add power & data outlets in 3 conference rooms	926.52		Cont Ext Requi	N Unforseer	Cancel	e and Assign

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. This is the new contract end date as a result of this change order.

🗊 Cost Management 👻	TEST-Olin Park Facility Improvements - CO 😵 🔻					
Home	Change Orders					
🗊 Cost	Change Order Request Processing Change Order Cha	nge Order				
🔒 Change Orders	+ Add ~					
Forecast	□ Number ↑ Name	Cost Status Committee	New End Date by PCO	Budget Na	ame	
Files	Expand Collapse	926.52	-			
🖆 Reports	□ > PCO-006 COR-032 Ø :	• Draft 926.52				
୧୨ Members	01 COR-032-Add power & data out_	• Open 926.52		Base Construction	Contract 2023 ∨	>
😚 Settings			Su Mo	Tu We	Th Fr	Sa
					1 2	3
			4 5	67	89	10
			11 12	13 14	15 16	17
			18 19	20 21	22 23	24
←			25 26	27 28	29 30	

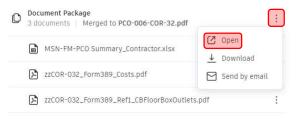
Click the name of the PCO to bring up the flyout. Under Documents, click *Add document* and then select *Generate from document template*. Select the only option.

COR-032 Processing Change Orde		×
Draft: Prepare p	_	t as Open
Details		
Details		
Number	PCO-006	
Name	COR-032	
Description		
Main Contract	Olin Park Facility Improvements	~
Cost Status	Draft Scope As	signed 🗸
Schedule Change	Days	
Туре		~
Scope of Work		
Documents		
Document Pack		in Autodesk Docs
Add document 🔨		
Add from Change C	rder Request	
Generate from doc	Default temptate	mmary_Contracto
Upload from your o	omputer	

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

U	ocuments		
			Stored in Autodesk Docs
1	Document Package		
	0 documents		
	Add document 🔨		
-	Recently generated	>	
	Recently generated		
	Add from Change Order Request		
	Generate from document template	>	
		/	
	Upload from your computer		

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.

6 10	Home	Change Ord	ers			
•	Budget Cost	Change Order Request	Processing Change Order	Change Order		
	Change Orders	+ Add V				
8	Forecast	□ Number 个	Name	Cost Status	Committed	New End Date by PCO
٥	Files	Expand Collapse			926.52	bute by ree
(<u> </u>	Reports	> PCO-006	COR-032	• Draft	926.52	Sep 20, 2023
20	Members			Set as Oper	1	
(c)	Settings			+ Add Change + Batch create % Add markup	e Change Orde	
				<u>ា</u> Delete		

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.

5. 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 1st 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

•	Workato Notification <mailer@workato.com> to cadbimmgr+com.eng.const_mgr ▼</mailer@workato.com>	3:18 PM (O 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.		
	 If incorrect, Discard Form #12. Reject PCO-006 Delete document package. 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.

🄊 Build 👻	8182-Public Health Remodel v5.6 🔹 👻	☑ ZM zz COM Engineering Construction Manager
Home	Forms CO Signoff by GC	In progress 🖸 Copy 🕑 Export 🗄
Files	Last synced today at 03:20 PM	
⊘ Issues	Form Details	1. CO Acceptance by GC
Forms	Form date	This contract change order agreement has been submitted under Sec. 104.3 of the Standard Specifications for Public Works Construction
Photos	🛱 6/29/2023 🗸 🗸	Show more
RFIs Submittals Meetings Correspondence Schedule	ID #12 Location Select a location ~ Description PC0-006	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
Assets	Assigned to COM-ENG-CONST MGR	Photos Ø Issues Ø Note
₩ Members	 Visible to 6 members References Add references Files PCO-006.pdf 	
~	Discard Changes save automatically	 Submit

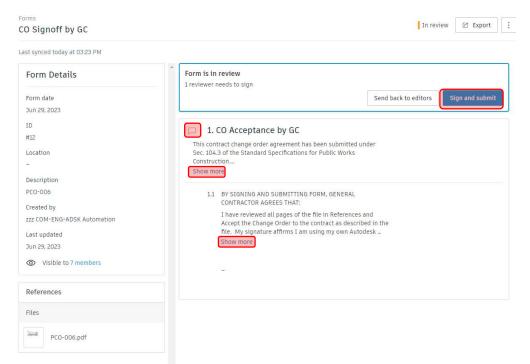
6. Build-Contractor approves CO Signoff by GC form

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.



7. 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.

Build -	8182-Public Health Remodel v5.6 🔹 🔻	0	ZM zz COM Engineering Construction Manager 👻			
Home Sheets	Forms CO Signoff by GC	Clos	ed Archive 🔾 Copy 🕼 Export			
 Files Issues 	Form Details	Form closed zz GC Project Manager signed off on this form on Jun 29, 2023 (Export 1 Form ×			
Forms Photos	Form date Jun 29, 2023 ID #12	1. CO Acceptance by GC This contract change order agreement has been submitted u Sec. 104.3 of the Standard Specifications for Public Works	 Detail report Labor summary report Only includes Work Logs defined by company, discipline or role. Work Logs are only in forms created using templates built in the template builder. 			
RFIS Submittals Meetings	Location Location mittals – tings Description PCO-006 espondence Submitted by adule zz GC Project Manager submitted on Jun 29, 2023	Construction Show more 1.1 BY SIGNING AND SUBMITTING FORM, GENERAL	File format File			
Correspondence		CONTRACTOR AGREES THAT: I have reviewed all pages of the file in References Accept the Change Order to the contract as descri file. My signature affirms I am using my own Auto Show more	s Customization			
ශීන Assets ළ Reports		-				
∾ Members	References	Reviewer's Signature	Include photos			
	zzForm12_Ref2_PCO-006.pdf	Signature				
		Name zz GC Project Manager				
		Date Jun 29, 2023 at 3:25:02 PM	Export			

Click Download. Open folder containing downloaded PDF.

	https://acc.autodesk.com/build/forms/projects/b5737dde-011d-	495d-9b23-81971ace47af/field-reports/e222	7d38-aad0-5dda-a35 A [%]	☆ ⊱ @ ⊻ % 🔮 … 🕑			
Build -	👌 8182-Public Health Remodel v5.6 👁 🔻		Downloads	g Construction Manager ▼			
Home	Forms CO Signoff by GC		Control call report-20230629203.pdf Y C Export Form detail report-202306292033.pdf y C Export Torm detail report-202306292031 (1).pdf				
FilesIssues	Form Details	Form closed zz GC Project Manager signed off on	Removed	×			
Forms	Jun 29, 2023	□ 1. CO Acceptance by	See more				
Photos	ID #12 Location - Description PCO-006 Submitted by zz GC Project Manager Submitted on	This contract change order agree Sec. 104.3 of the Standard Specifi Construction Show more		Your export is complete Share the link below, download the report directly, or email this report to others			
Submittals		1.1 BY SIGNING AND SUBM CONTRACTOR AGREES I I have reviewed all pag		Shareable link https://developer.api.autodesk.com/repor			
Correspondence			er to the contract as descri ms I am using my own Auto	Copy link Email to (optional)			
용 Assets 같 Reports S Members	Jun 29, 2023 O Visible to 10 members	-		Send emails			
Bridge	References	Reviewer's Signature					
	zzForm12_Ref2_PCO-006.pdf	Signature	ſ	Download			
. 12		*	l	Dominista			

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.

	ps://acc.autodesk.com/cost/ch	angeorder/projects/b5737dde-	011d-495d-9b23-81971ace47af/changeor A ☆	🔸 🛃 📕 🖛 Downloads			-	
UTODESK Construction Cloud				File Home Share View	and the second second second	Item check boxes		
Cost Management 👻	8182-Public Healt	:h Remodel v5.6 🔹 👻	Q ZM ZZ COM	Medium		File name extension:	s Hide selected Option	<u> </u>
) Home	Change Ord	ers	COR-032	Navigation Details pane B List	Layout Surrent view	Hidden items	items 👻	6
) Budget	change ora	010	Processing Change Order	← → · · ↑ 🗣 > This PC > Down	loads	5 v		
Cost	Change Order Request	Processing Change Order	> Details	A Quick access	Name	Date modified	Туре	Size
Change Orders	+ Add V		> Scope of Work	This PC	 Form detail report-202306292034.pdf CBFloorBoxOutlets (2).pdf 	6/29/2023 3:34 PM 6/29/2023 1:21 PM	PDF Document PDF Document	99 K 1,008 K
Change orders	1 400		2 scope of Hold	3D Objects	22COR-032 Form389 Costs.pdf	6/29/2023 1:21 PM	PDF Document	554 K
Forecast			✓ Documents	A360 Drive (isappMTCSW)	Build-SubmittalsImport_blank (2).xlsx	6/29/2023 9:01 AM	Microsoft Excel W	33
Torecast	□ Number 个	Name 💿		Desktop	ACC-CO.docx	6/28/2023 3:57 PM	Microsoft Word D	2,510
Files				Documents	Build-FakeAcctEmails.xlsx	6/27/2023 3:39 PM	Microsoft Excel W	
	Expand Collapse			L Downloads	ACC-Submittals_process.docx	6/26/2023 3:56 PM	Microsoft Word D	1,886
Reports	> PCO-006	COR-032	Document Package	7B54D7FA-A784-1FCC-BC26-	ACC-Submittals_initial.docx	6/26/2023 3:54 PM	Microsoft Word D	974
			3 documents Merged to PCO-006.pdf		PR#_1215713_4172_2023_06_23.pdf	6/26/2023 2:44 PM	PDF Document	46
Members				70BC12F8-631C-4686-8352-18	D SD-80 - 32 33 13-01 Bike Rack SUB.pdf	6/23/2023 3:00 PM	PDF Document	1,94
		COM-ENG-FM PCO Summary_Contractor	410CB9C0-CD7E-3626-A92F-t	32 33 13-01 Bike Rack SUB.pdf	6/23/2023 3:00 PM	PDF Document	1,943	
				8152-03_selected_2022-09-21	Build-SubmittalsImport_example (2).xlsx ACC-Submittals_initia165165161.docx	6/23/2023 2:35 PM 6/23/2023 2:31 PM	Microsoft Excel W Microsoft Word D	1,21
		ZZCOR-002_Form9_Costs.pdf	9050-Olin Park Facility Impro	ACC-Submittals_Initia105105101.00cx	6/23/2023 2:31 PM	Microsoft Word D	1,213	
			ZZCOR-002_FOIII9_COStS.pdf	9050-Olin Park Facility Impro	Build-SubmittalsImport example (1).xlsx	6/23/2023 2:10 PM	Microsoft Excel W	. 29
				autodesk_data_extract	Build-SubmittalsImport_blank (1).xlsx	6/23/2023 12:55 PM	Microsoft Excel W	
			zzCOR-002_Form9_Ref1_CBFloorBoxOut	autodesk_data_extract (1)	Build-SubmittalsImport blank.xlsx	6/23/2023 12:43 PM	Microsoft Excel W	
				BIM 360 Administration_files	ACC-ProjCreation (3).docx	6/23/2023 12:39 PM	Microsoft Word D	3,42
			Add document 🗸	com-eng-dev_city-of-madisc	ACC-ProjCreation (2).docx	6/23/2023 12:34 PM	Microsoft Word D	3,42
			Add document	data-connector-power-bi-ter	ACC-ProjCreation (1).docx	6/23/2023 12:29 PM	Microsoft Word D	3,42
				data-connector-power-bi-ter	Action Required_ CO Signoff by GC Form	6/16/2023 1:40 PM	E-mail Message	
				data-connector-power-bi-ter	ACC Build Training Syllabus_COM.pdf	6/15/2023 9:43 AM	PDF Document	29
			Attachments	F680CFD8-28A2-F3B6-0684-1	Form detail report-202306141459 (1).pdf	6/14/2023 10:06 AM	PDF Document	9
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			- copy	Jannah Review	Form detail report-202306141459.pdf	6/14/2023 10:00 AM	PDF Document	9
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			✓ Linked References	Public Health Remodel v5.6_/	chat-transcript (6).txt	6/8/2023 3:51 PM	Text Document	
				Sample Data_selected_2022-1	subscriptions.xlsx	6/8/2023 10:20 AM	Microsoft Excel W	
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			References	1_com-eng-devl_city-of-mac		C (7/2022 7.25 AM	PDF DOCUMENT	10

Important: wait for blue wheel next to filename to finish spinning before proceeding. It indicates successful upload of the attachment. Click the 3 vertical dots, select Cost change, and then Generate Change Order.

Change Ord	ers		COR-32 Processing Change Order				
Change Order Request	Processing Change Order	Change Order		> Quotatio			
+ Add V		☑ Cost change >	➔ Generate Change Order	r			
		Reject	∋ Generate Contract With	n GC 🔞	ances		
Number ^	Name	+ Add Change Order Request	ate Budget Nar 🔞				
Expand Collapse		 Experimental and the second sec		Refe	erences	Add references 🗸	
> PCO-001	Change consists of COR-1 Stan	+ Batch create Change Order Request	-				
> PCO-002	COR-009 thru 012	Batch request quotations		Form	15		
> PCO-003	COR-013 thru 021	% Add markup >					
> PCO-004	COR-022 thru 025			1.0000	CO Signoff by GC #403 Jan 6, 2023 Submitted		
> PCO-005	COR-26 through COR-30	🛍 Delete		Juire	of 2020		
PC0-006	COR-32 0	• Open 926.52	-	> Markup!	Summary		

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.

Before setting to Open						After setting to open and Workato setting the type						
Change C)rders					Ch	ange Ord	ers				
Change Order Requ	Processing Change Order	Cha	inge Order			Char	nge Order Request	Processing Change Order	Cha	ange Order		
Number ^	Name		Status	Committed	Туре		Number ^	Name		Status	Committed	Туре
Expand Coll	apse			89,778.17			Expand Collapse				89,778.17	
> CO-004	COR-022 thru 025	:	Executed	25,001.29	BPW		> CO-004	COR-022 thru 025	:	Executed	25,001.29	BPW
> CO-005	COR-26 through COR-30	:	Executed	4,223.09	Non-BPW		> CO-005	COR-26 through COR-30	:	Executed	4,223.09	Non-BPW
> CO-006	COR-32	:	Draft	926.52			> 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: <u>https://www.cityofmadison.com/employeenet/engineering/board-of-public-works-common-council-calendar</u> 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.

References		Add references 🗸	
Forms			
CO Signoff by G Jun 29, 2023			
Markup Summary			
Approval			
Tax			
Dates			
Custom Attributes		:	
Schedule Chang Explanatio TY_Stre TY_Sewer-Sanita TY_Sewer-Stor TY_Wat TY_TE-Electric	n: Supply chain delaya		
TY_Faciliti			

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.

	Stored in Autodesk Docs		
Document Package 0 documents			
Add document 🧄			
Add from Change Order Request			
Add from Processing Change Order			
Add from RFQ			
Generate from document template	1-COM-ENG-FM_CO Internal Summary Default template		
Upload from your computer	2-COM-ENG-FM_CO BPW Report.xlsx		
Attach from Autodesk Docs			
References	Add references 🗸		
Forms			
CO Signoff by GC #12			
Jun 29, 2023 Closed			

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.

8. 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.

	The Review COR-006 Change Order
Order	
Send email to reviewers \times	Await internal review: Project Manager Approval Reviewers: zConstMgr_Last, zProjMgr ProjMgr_Last
Subject *	Due date: Aug 8, 2022 Remind Review for another reviewer
Change Order - CO-004 - COR-006 requires your review and response.	Remind Review for another reviewer
Remind reviewers *	✓ Details
zConstMgrzConstMgr_L × zProjMgr ProjMgr_Last × 🗸	W Details
Email notifications are only sent to reviewers list above. Any reviewers for this task can take action during the review task.	Number CO-004
Email message *	Name COR-006
Please review the associated scope and information and respond accordingly.	Description
	Main Contract Main Contract
Due date	Budget ADDLCOs12345-11-112 - Signage
Aug 8, 2022	Status In Review Type 🗸
Skip Send	Schedule Change 0 Days
	> Scope of Work

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.

	Action Required: Public Health Remodel v5.6 - Change Order - CO-004 - COR-006 requires your review and response.	8 8
1	Autodesk Construction Cloud <no-reply@a (0="" 11:13="" ago)="" am="" minutes="" ☆<br="">to cadbimmgr+constmgr4 ★</no-reply@a>	x •
	City of Madison - Engineering • Public Health Remodel v5.6	Sample of Email. Review staff would follow link via blue Open in Cost Management button
	Your action is required	, ,
	John Sapp sent Change Order CO-004 - COR-006 to	you
	"Please review the associated scope and information and respond acc	ordingly."
	Overview	
	Number <u>CO-004</u>	
	Name COR-006	
	Open in Cost Management	
	Sender's Email: jsapp@cityofmadison.com	
Clicking review in A	ACC will bring up this window	
Review Change Order		Cancel Submit 4- Submit after selecting Response
Documents		
Document Package 1 document		I- Select Open to view Document Package PDF in the system
MSN-FM-CO DocTem Generated from tem	npl.xlsx plate by John Sapp Aug 5, 2022	i
Attachments 1 document		
PCO-005-COR-006.p Uploaded by John Sa		2- Select Open to view Attachments PDF in the system
Response *		
Proceed V	3-Select Proceed or Revise	
	itted for the next review step: Staff Review once all requi	red reviewers respond
Comments		
ZL Add a comment	3R-If <i>Revise</i> is selected as the Res	ponse, then a comment must be provided prior to <i>Submit</i> . Note
		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.