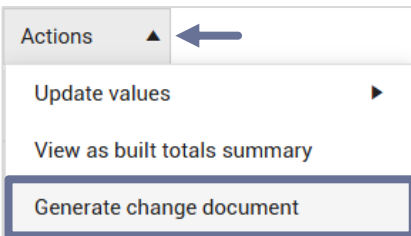


◆ GETTING STARTED

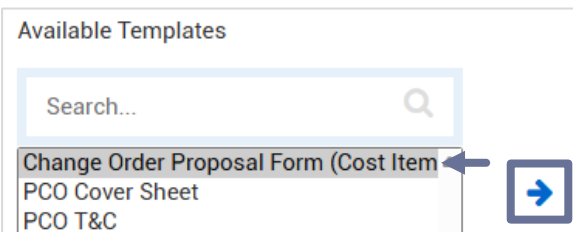
- This guide assumes you already have document templates added to your project.
- Change Writer is used to generate change documents from issues, PCOs, or CCOs using predefined templates.
- Use this process when you need to create contract documents, notices, or change order documentation for stakeholders.

◆ GENERATE A CHANGE DOCUMENT

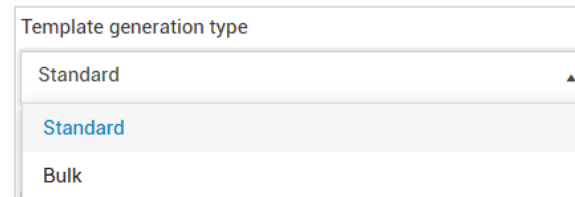
1. Navigate to an **Issue**, **PCO**, or **CCO** record.
2. Click **Actions** and select **Generate change document**:



3. On the Change template screen, move one or more templates from **Available templates** to **Selected templates**.

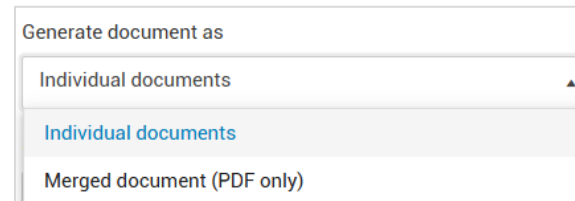


4. In the Change template details section, select **Standard** or **Bulk** template generation type.

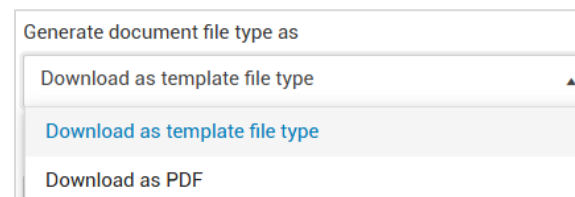


Note: Bulk template generation will produce one document for each selected project contact (up to 10) on the Selected contacts page.

5. For Generate document as, select **Individual documents** or **Merged document (PDF only)**.



6. If Individual documents is selected, choose **a file type** for Generate document file type as



GENERATE A CHANGE DOCUMENT (CONT.)

7. Enable or disable the toggle to **Save in Supporting documents tab**

Save in supporting documents tab

8. If the save toggle is enabled, you can choose to **name the document file**.

Name of document file i

Note: If this field is left blank, individual documents will generate with the template name

9. Select a value under **Select watermark stamp** (if required).

Select watermark stamp

Select one ▲

Select one

Draft

7. Click **Next**.

Next

8. If prompted, choose **contacts** on the Select contacts screen and click **Next**.

Select contacts

Only one project contact can be selected for Standard template generation type.

Selected project contacts

	First name	Last name	Full name
	<input type="text"/>	<input type="text"/>	<input type="text"/>

13. Review and enter required values in the fields on the **Review fields** screen.

Review templates ▼

Review below fields before proceeding. These field values will replace the corresponding tags in change document.

Company legal name

14. Click **Preview document** to review the output, then close the preview.

Preview document

15. Click **Finish** to generate the document.

REVIEW

1. Confirm that the document generated successfully.
2. Open the document from the Supporting documents tab (if saved)
3. Review the generated file for accuracy before distribution.

NEED SOME MORE HELP?



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