Unapproving Records for Correction

Contracts, Change Orders, and Payment Applications are legal documents that are all linked to each other in both 'reality' and ProjectTeam. Finalization of these records through approval in the ProjectTeam system using the blue 'Approve' button is what makes them valid records and applies the dates, values, and terms on the project. An 'Approved' record is considered just that. The assumption is that the record has been vetted and any issues resolved prior to approval.

Occasionally, mistakes are found on Contract, Change Order, and/or Payment Application records in ProjectTeam that have been deemed 'Approved' and unapproval of those records is required prior to editing them to correct the record. As those records are all linked, there are a few rules that must be followed to unapprove them.

Change Order records can lock certain fields on the associated Contract record. Approved Payment Applications can lock certain fields on both the associated Change Order records and the underlying Contract record. This means that unapproval of multiple records, or even multiple records of multiple record types, is often required to make a single correction.

General Rules for Unapproving Records

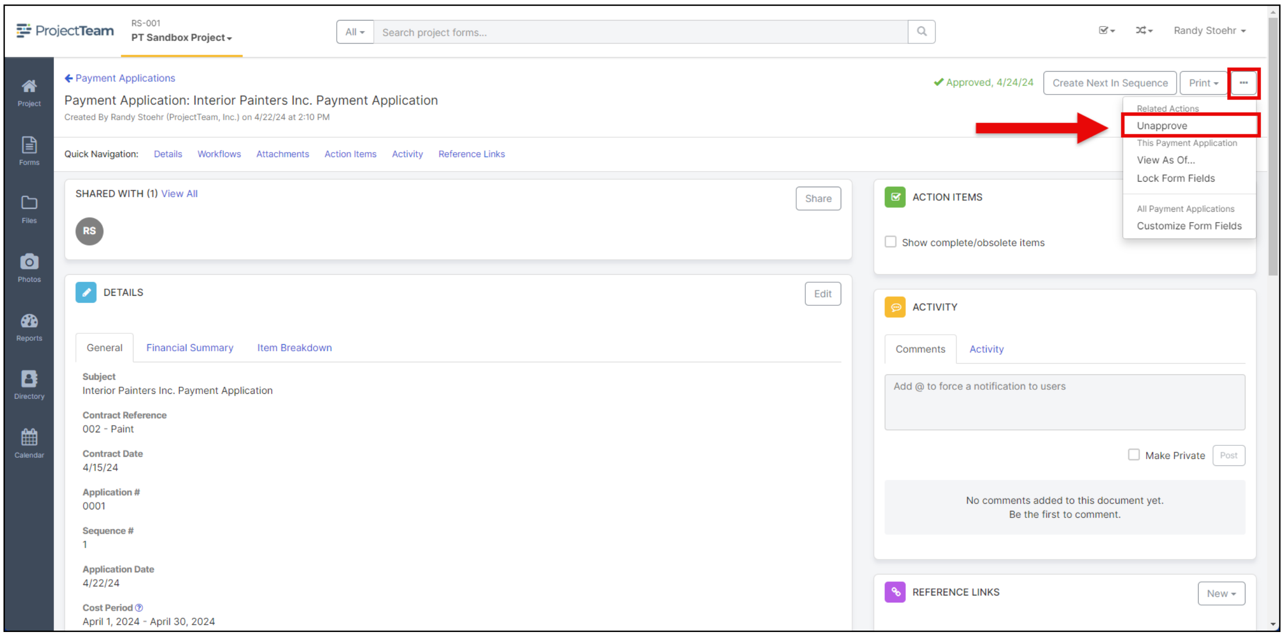
1. **Only DGS/DC Gov users with Project Administrator rights can unapprove records** – See the DGS Project Manager or DGS Asst. Project Manager to have records unapproved.
2. **All records must be unapproved in reverse order of approval** – Always start with the newest record of that type – unapprove it and move to the next most recent.
3. **Out-of-sequence approvals will require out-of-sequence unapproval** - If you are working your way back through records to unapprove them and the next-earliest record does not show the 'Unapprove' option, that record may have been approved out-of-sequence. Trial and error until you find the next earliest approval is the only way to resolve this issue.
4. **Payment Applications need to be unapproved before any associated Change Orders or Contracts can be unapproved** – Always start by unapproving any associated Payment Applications when editing a Change Order or Contract.
5. **Records are contract-specific** - You only need to unapprove linked records that are associated with the same Contract.
6. **Records are linked chronologically** - You only need to unapprove linked records back through the valid period of the record that you need to edit.
7. **Make all required edits to records in order of award when editing multiple records of the same type** -For example, correct Pay App or Change Order #1, then #2, then #3, then #4, etc. Re-approve them as you correct them
8. **Once unapproved, Change Order values and additional days do not apply to the contract value or payment application financials** – Correct and reapprove the Change Order(s) to reapply them.

Unapprove a Record

The unapproval process for each record type is the same.

With the record that you wish to unapprove open in ProjectTeam, click the options (...) button on the top right of the record in view mode. In the "Related Actions" section of the dropdown, click the **Unapprove** option.

NOTE: If you do not see the Unapprove option in the list, refer to the guidelines above and retrace your steps. The Unapprove option is only available when the guidelines are met.



You will be prompted to confirm if you really want to unapprove the record, select **Yes** to unapprove.

Repeat as needed until the record that you wish to edit is unapproved. Reapprove as directed in the guidelines provided at the beginning of this QRG.