Dual Action

Dual Action requires a transaction to be approved by a different end user from the one who created it, even if the drafter has approval rights. Some changes require Dual Action before they go into effect. These changes are categorized under non-financial and financial transactions.

Dual Action for non-financial transactions

After a user makes non-financial changes in the User Roles, Company Policy, or Users pages, you will need to approve or reject them. The user will only see approved changes once they log off and log back in.

Examples of non-financial changes that can be approved or rejected include:

- Removing a feature
- Editing account access rights
- Changing a user's assigned User Role
- Activating a user
- Assigning a role to a user
- Making User Role edits
- Making Company Policy edits

For your own non-financial changes, another user with rights to access the pages where the changes occurred may have to approve your changes. You will only see approved changes once you log off and log back in. In both cases, the policy will have a pending status until a user approves the changes.

> Caution: An approver can't make a change, approve it, and then use the new rule in the same session. Approved changes will only take effect after logging off and logging back in.

Approving and rejecting user changes

When dual approval for non-financial actions is enabled, you may need to approve or reject changes within these pages. You can edit users on the User Management, Company Policy, and User Roles pages. Make sure you entered all of your changes within these pages before saving and submitting them. Once you submit the policy, the pending policy is locked and must be approved or rejected before you can make further changes.

After saving policy changes, you have the option to reject the recent changes. This is especially useful if you made an unnecessary policy change.

> Note: A user will only see approved changes to their own User Role once they log off and log back in.

To approve user changes

1. After making changes, click or tap **Save**. The Approve and Reject buttons appear on the page.
2. (Optional) Click or tap **View Active Policy** to see the current policy.
3. Click or tap **Approve** to approve the changes.

To reject user changes

1. After making changes, click or tap **Save**. The Approve and Reject buttons appear on the page.
2. Click or tap **Reject**. The Policy Changes Cancelled overlay appears confirming the rejection.

Approving and rejecting User Role changes

After a user makes changes in a User Role, you may need to approve or reject changes.

> Note: The user will only see approved changes once they log off and log back in.

To approve User Role changes

1. After making changes, click or tap **Save**. The Approve and Reject buttons appear on the page.
2. (Optional) Click or tap **View Active Policy** to see the current policy.
3. Click or tap **Approve** to approve the changes.

> Note: Make sure you entered all of your changes before saving and submitting them. Once you submit the policy, the pending policy is locked and must be approved or rejected before you can make further changes.

To reject User Role changes

1. After making changes, click or tap **Save**. The Approve and Reject buttons appear on the page.
2. Click or tap **Reject**. The Policy Changes Cancelled page appears confirming the rejection.

Approving and rejecting Company Policy changes

After a user makes changes in a Company Policy, you may need to approve or reject changes. The changes must be approved or rejected before the user can make further changes. The user will only see approved changes once they log off and log back in.

To approve Company Policy changes

1. After making changes, click or tap **Save**. The confirmation message appears.
2. Click or tap **Close**. The Approve and Reject buttons appear on the page.
3. (Optional) Click or tap **View Active Policy** to see the current policy.
4. Click or tap **Approve** to approve the changes.

To reject Company Policy changes

1. After making changes, click or tap **Save**. The confirmation message appears.
2. Click or tap **Close**. The Approve and Reject buttons appear on the page.
3. Click or tap **Reject**. The Policy Changes Canceled page appears confirming the rejection.
4. Click **Close**.

Note: If Dual Action approval for Corporate non-financial actions is disabled while pending changes are outstanding, the changes must be accepted even if Dual Action approval was disabled prior to the end user accepting changes. Contact your financial institution for more information on approvals and rejections of non-financial actions.

Dual Action for financial transactions

Some financial transactions require Dual Action approval by a different end user than the one who created it, even if the drafter has approval rights.

If the user attempts to approve an amount, at any level, that exceeds the set Dual Action amount, the Approve button will be dimmed and the user will be stopped from approving the transaction. However, the user can still draft the transaction.