IMM eSign Cloud – Customer Acceptance Testing (CAT) - Loandesk

 Test to be Performed

|  |  |  |
| --- | --- | --- |
| Host Connectivity And Document Set Testing | Pass/Fail | Comments |
| Log into the host system and launch eSign successfully. |  |  |
| Ensure the user can successfully authenticate with Azure user ID credentials. |  |  |
| Add documents to a document set |  |  |
| Delete documents from a document set |  |  |

|  |  |  |
| --- | --- | --- |
| In-person Signature w/Secure Delivery Feature | Pass/Fail | Comments |
| Log into the host system and launch eSign successfully. |  |  |
| Add documents  |  |  |
| Preview selected documents in a new window. |  |  |
| Click Process > Add additional information into entry fields on the documents |  |  |
| Add "Notes" that are relevant to the session |  |  |
| Transfer ownership of a document session to another user |  |  |
| Retrieve session by logging through transferred user account and using the eSign ‘Search Active’ feature on a PC or tablet (if applicable). |  |  |
| Ensure the ‘Add Docs/Attach’ feature is functioning as expected using the ‘Browse’ option. |  |  |
| Ensure you can add a signature or initial field to the Attached doc using the Document Design feature. |  |  |
| Ensure you can capture in-person signature successfully |  |  |
| Ensure you can print documents successfully to a printer within eSign from user's workstation |  |  |
| Document Duplex Printing (if applicable) |  |  |
| Ensure you can send in-person signed documents securely using the Delivery feature. |  |  |
| Ensure documents signed are downloading and importing into the imaging system as expected. Document downloader job is running every 1 hr. Please Ensure in person signed documents are imported within 1 hr in AMS |  |  |

|  |  |  |
| --- | --- | --- |
| Remote Signature With Remote Attachment Feature | Pass/Fail | Comments |
| Log into the host system and launch eSign successfully. |  |  |
| Add documents > Click Process |  |  |
| Request a required and optional remote attachment for each party |  |  |
| Click Sign > Submit document for remote signature |  |  |
| Complete remote signature for all signing parties by adding requested remote attachment |  |  |
| Ensure remotely signed docs and requested attachments are downloading and importing into the imaging system within 3 hr after all parties signs remotely. |  |  |

|  |  |  |
| --- | --- | --- |
| Imaging System | Pass/Fail | Comments |
| Ensure the Imaging Index Service Client and import process is functioning as expected. Users should be able to search for recently archived eSign documents and remote attachments in the imaging system. If no imaging system is in use, ensure that users can successfully retrieve archived documents and remote attachment using the eSign ‘Search Completed’ feature. |  |  |
| Confirm user can open the PDF in your imaging system and it appears correct. Ensure the archived documents in imaging system have captured signatures (both in-person and remote) |  |  |
| Verify all PDFs are displaying under associated member number, folder (suffix) and date in AMS imaging system. If other than AMS, verify all indexes are displaying correctly in the imaging system. |  |  |
| IMM eSign Online Help |
| Installer to review IMM eSign Online Help |  |  |

|  |
| --- |
| Acceptance |
| Customer/Tester Name |  |
| Date |  |
| ***\*\*\*Please type name and date on this form then return it to your IMM Project Manager\*\*\**** |