DocuSign Lobby Management Application v1.0

The DocuSign Lobby Management Application is designed for companies who need a lightweight way to replace outdated paper sign in sheets in the lobby of their business. Traditional Paper sign in/sign out processes leave a lot to be desired. They don't have a good way for the person signing in to see what they are agreeing to, they don't offer an easy way to see who is still in the building for the front desk attendant, and they don't handle signing off on important NDAs easily. The DocuSign Lobby Management Application is designed to solve all of these problems.

The DocuSign Lobby Management Application is run on a server controlled by the customer, and is built to be easy to connect to the customer's existing DocuSign account. It allows you to easily route visitors to the correct process for signing in and can be run on any device on the lobby desk. It could be an iPad, a desktop, or any touch device. DocuSign's Lobby Management Application is a lightweight, easy way to simplify the pains of a traditional front desk experience.

This guide provides information for the DocuSign Lobby Management Application v 1.0.

Installing the Lobby Management Application

1. Download the Lobby App zip file from the DocuSign website and unzip the file into folder.

> **Note:** If you are using a Debian Linux based system (such as Ubuntu), you must install some prerequisite software. From the command line type:
>
> ```
> sudo apt-get install nodejs npm git g++ make ant libsqlite3-dev
> ```
> Continue with the installation.

2. From the command line, go to the folder and type `ant install`.

   Example: If you unzipped the lobby app to a folder named lobby, from the command line you would type:

   ```
   cd lobby/
   ant install
   ```

3. To run the app from the command line type: `node app`.

4. Point your browser to: http://localhost:3000.

> **Note:** If you want to use a port number other than 3000, add the port information when running the app.
>
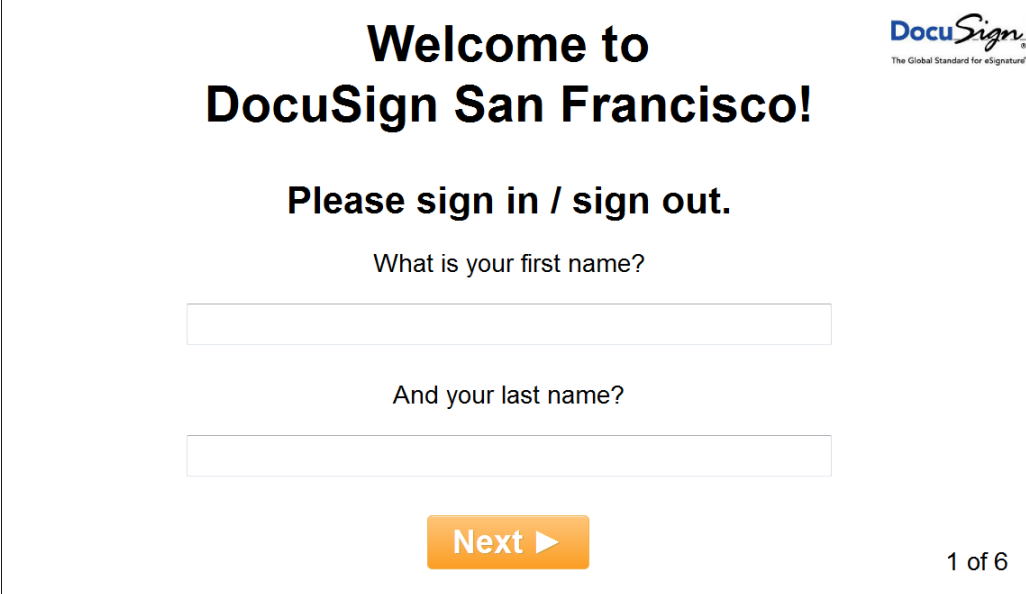> *Example:* If you want to use port 31415, from the command line you would type:
>
> ```
> PORT=31415 node app
> ```
>
> If the port number is less than 1024, you must prepend the command with `sudo`. To use port 80, from the command line you would type:
>
> ```
> sudo PORT=80 node app
> ```

Using the Lobby Management Application

The Lobby App asks a visitor to type their first name and last name to start the sign in process.
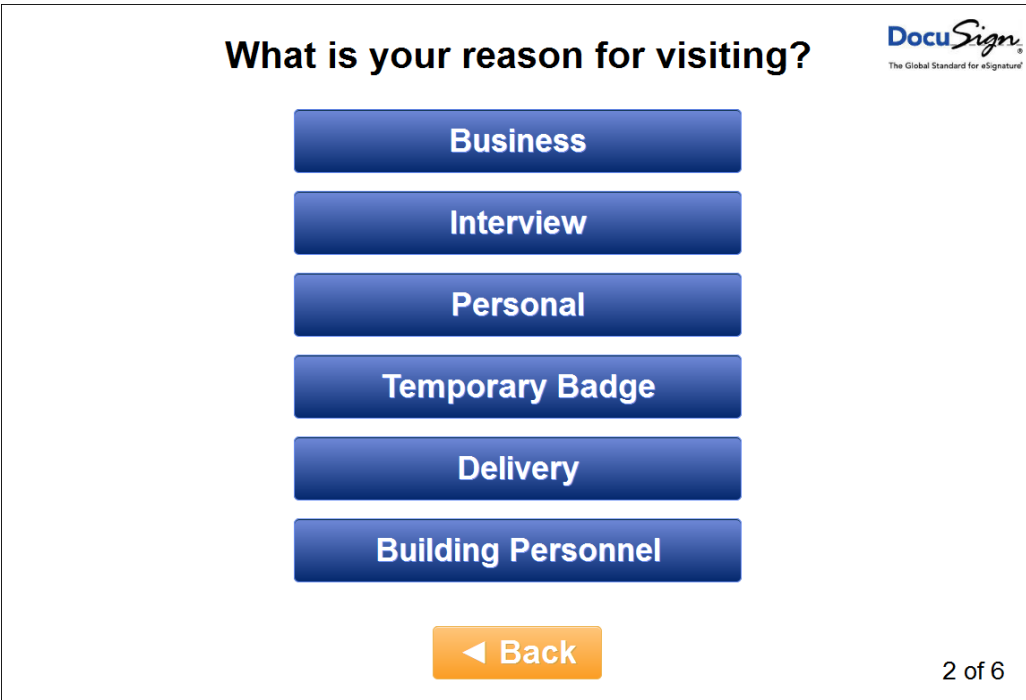
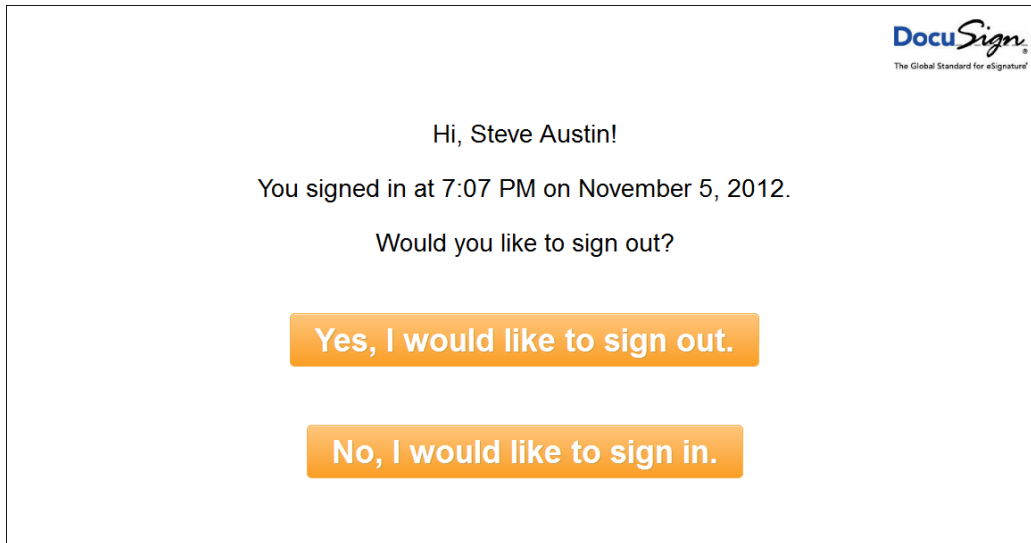
The visitor is then asked to select a reason for their visit.

Depending on reason selected, the visitor is taken through a series of one or more pages that might ask for additional information and have them sign documents (such as a non-disclosure agreement).

> **Note:** The available reasons and pages shown when a reason is selected depend on the options set for that reason by the administrator.
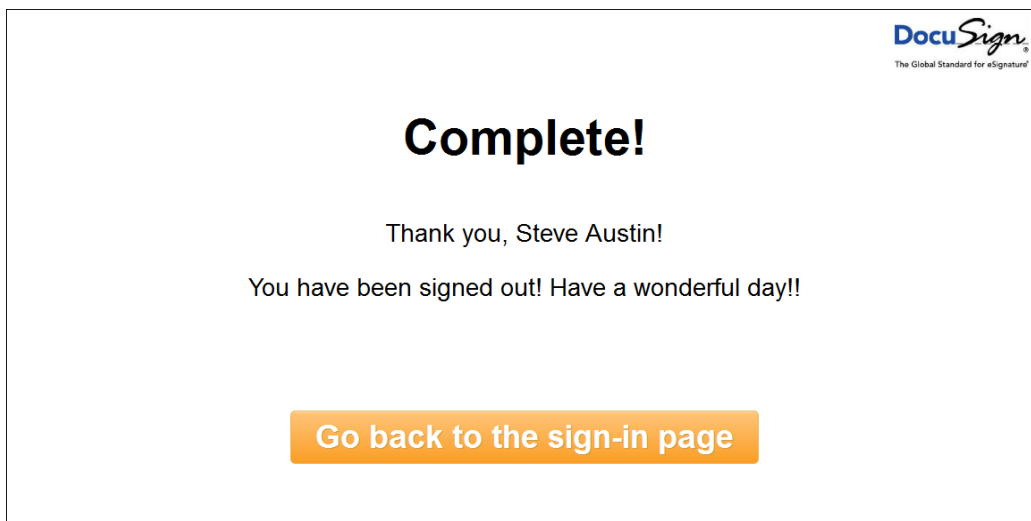
After the visitor has entered all the needed information, they are returned to the Welcome page.

When a visitor is leaving, they follow the same process of typing their first name and last name. The system recognizes the visitor's name and ask them if they would like to sign out.

If the visitor selects to sign out, the system signs them out and updates the log.

Administering the Lobby App

The Lobby App Administrator Menu allows the administrator to change the app settings, review the sign-in/sign-out history, edit the visit reasons and view/edit the visitor hosts.

To access the Administrator Menu, open your browser, go to: http://localhost:3000/admin and enter the administrator password.

> **Note:** The default password for the app is: secret123. This password can be changed when changing settings. It is recommended that you change the administrator password for your app.

After signing in, the Administrator Menu is shown. Click on the appropriate block to access the menu item. The options in each menu item are explained below.
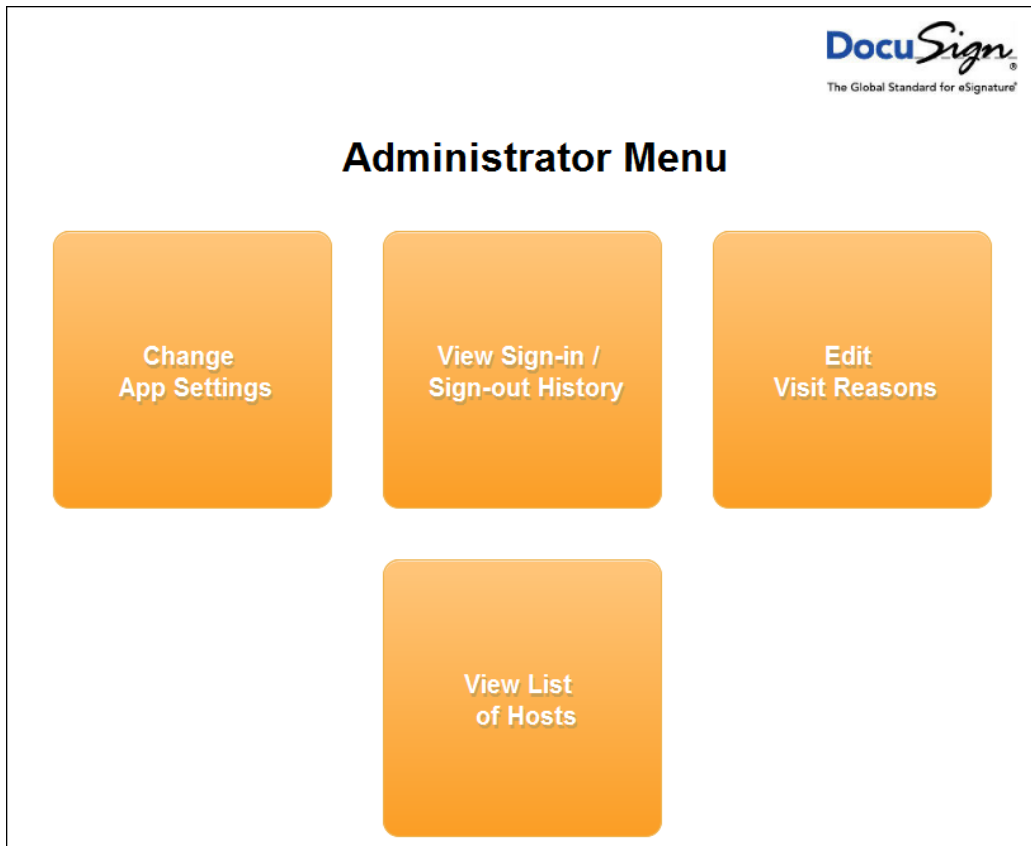
Changing Settings

This page lets you change the settings for the Lobby App. There are three basic sections to this page: App Page Settings, DocuSign Environment Settings and Lobby App Password Settings. The options in each section are described below. Click **Back** to return to the Administrator Menu.

The App Page Settings section allows you to change:

- **Company name:** This is the name shown at the top of the Welcome page. Type name and click **Update** to change the name.

- **Company location:** The location shown adjacent to the company name at the top of the Welcome page. Type a location and click **Update** to change the location. This can be left blank.

- **Company logo:** The image shown in the upper right of the Lobby App pages. The logo file must be a .png file. Type the file location or use the **Browse** button to find the file and then click **Update** to change the image. The maximum image size is 1MB.

- **Idle time:** The amount of time, in seconds, until the app automatically returns to the Welcome page if there is no user action (for example, if the setting is 60 and a visitor enters their name, clicks **Next** and then does not take any action for 60 seconds, the app will return to the Welcome page). Type the time and click **Update** to change the setting.

The DocuSign Environment Setting section allows you to change:

- **DocuSign environment:** Use the drop-down list to select the DocuSign Environment to which the Lobby App is pointing. This is important if the Lobby App will use templates in the Visit Reason settings.

- **DocuSign account name:** This is the name of a user for the selected DocuSign account. If the Lobby App will use templates in the Visit Reason settings, the user must have access to the template.

- **DocuSign account password:** The password for the user entered above.

- **Test DocuSign connection:** Click this button to check to see if the environment, account name and password combination is correct. If it is correct, a green checkmark is shown. If it is not correct, a red X is shown.

- **Update DocuSign account information:** Click this button to change the DocuSign Environment settings.

The Lobby App Password Settings section allows you to change the administrator password.

- **To change the password:** Type the new password in both fields and click **Update** to change the password.

Sign-in/Sign-Out History

This page lets you view the Sign-in and Sign-out history in the Lobby App. You can also sign out any visitors that have not signed out through the app.

The initial page view shows the visitor log for the current date. You can change the date you are viewing by clicking the **Date** and using the calendar function to select the date you want to view.

You can sign out a visitor by clicking **Sign Out**. The system records the current time as the Sign-Out Time and removes the button.

You can select how many entries shown on the page using the **Show** drop-down list. You can sort the visitor log by clicking on the appropriate heading item.

Click **Back** to return to the Administrator Menu.

Editing Visit Reasons

This page lets you view, add, edit and delete Visit Reasons. The Visit Reasons are shown on the second page a visitor sees when signing in.

DocuSign
The Global Standard for eSignature

Edit Visit Reasons

Show 10 ▼ entries   Search: [   ]

#	Reason	Access Key	Show Company Page?	Template ID	Show Host Page?	Show Badge Page?	
1	Business	b	1	459CBF61-E060-4DD3-B9E1-295A8772236F	1	0	X
2	Interview	i	0	459CBF61-E060-4DD3-B9E1-295A8772236F	1	0	X
3	Personal	p	0	---	1	0	X
4	Temporary Badge	t	0	---	0	1	X
5	Delivery	d	0	---	0	0	X
6	Building Personnel	u	0	---	0	0	X

Showing 1 to 6 of 6 entries   ◁ Previous Next ▷

Click to add a new row

◂ Back

To add a new Visit Reason:

- Click the **Click to add a new row** link. A new row is added with (click to edit) in each column.

- Click in a column to modify the settings for the Visit Reason.

   - **Reason:** This is the text shown in the Visit Reason button.

   - **Access Key:** This is not used in the current version.

   - **Show Company Page?:** If this is set to "1" the page asking the visitor to enter their company and title is shown. The title is not required to go to the next page. Set the column to "0" to bypass the company/title page.

   - **Template ID:** If you want the visitor to sign or review a document, such as a non-disclosure agreement, enter the DocuSign Template ID of the document(s) the visitor should sign or review. Leave this column blank if the visitor does not need to review or sign any documents.

   - **Show Host Page?:** If this is set to "1" the page asking the visitor to enter the name of the person they are visiting is shown. The visitor is required to enter a name and the name must match one that is listed in the Hosts page. An email message is sent to the host informing them the visitor has signed in. Set the column to "0" to bypass the host page.

   - **Show Badge Page?:** If this is set to "1" the page asking the visitor to enter their badge number is shown. Set the column to "0" to bypass the badge page.

To edit a Visit Reason:

- Find the Visit Reason you want to edit.

- Click in a column to modify the settings for the Visit Reason. See the column information above for information on what to enter in the column.

To delete a Visit Reason:

- Find the Visit Reason you want to delete and click the **X** in the same row as the Visit Reason.

- You are asked to confirm that you want to delete the Visit Reason. Click **OK** to delete the Visit Reason.

Click **Back** to return to the Administrator Menu.

Viewing Hosts

This page shows the list of hosts in the system. When the host page is displayed, a visitor is asked whom they are seeing and enters the host's name. An email message is sent to the host informing them the visitor has signed in. When the visitor is typing the host name, the system will offer auto complete of the name after the visitor has typed the first 3 characters of the host's name.

To upload a list of hosts:

> **Important:** Uploading a new list of hosts replaces the current list of hosts.

- Create a Create a comma-separated value (CSV) file with the list of hosts.

  When creating the list, do not include a header row for the file. Each line of the file should have the host name and host email information with commas used as the delimiter (separator) between each value.

- Type the file location or use the **Browse** button to find the file and then click **Update** to change the list of hosts.

- Click **Back** to return to the Administrator Menu.

FAQs

I would like to test out the Lobby App without coming up with my own data. Do you have some test data I can use to test or demonstrate the app?

- Yes, we have included data so you can populate the database with test data. From the command line type `ant database-dev`.

How do I uninstall the Lobby App?

- Uninstalling the app can be done by deleting the directory that has the app code. From the command line type `rm-rf lobby/`.

We lost the password to get to the Administrator Menu. Is there any way we can reset the password?

- As a last resort, you can reset the Lobby App administrator password. From the command line run the following command: `node reset-admin-password.js`