

## faciliscan™ User Guide – Table of Contents



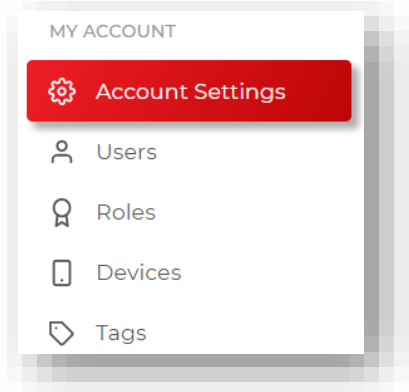
### faciliscan™ Admin Site Instructions

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# Quick Card: How To Setup faciliscan™ Program

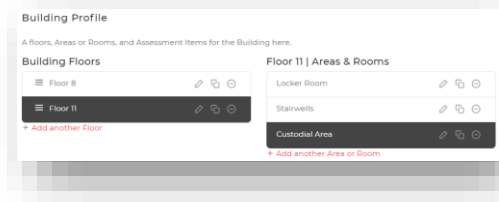
## Get Started with faciliscan™ by setting up Your Account:

1. Choose **Account Settings** and fill out **Company Info**
2. Create **Tags** to identify Users, Buildings & Customers within your company
3. View & edit **Roles** to best fit your audit preferences
4. Add **Users** and assign them **Roles and Tags**
  - a. Assign new users a role: Auditor, Compliance Manager, Admin
  - b. Assign new users a tag to Buildings or Customers to control their visibility to audits and scores
5. Add **Customers** and assign tags and preferences



## Prepare & Send Audits

1. Go to **Buildings** tab, click +Add New, fill out building info & choose correlating tags
2. Create the **Building Profile** by adding & editing: Floors, Areas & Items
3. Go to **Schedule** tab and assign an auditor a building to audit



## Get Started: 3 Setup Steps!

### 1. Setup Your Account

- Input your company information and enable/disable Audit Settings

### 2. Create Tags & Review Roles

- Tags help segment reporting, analytics & to control user visibility within your organization. Create Tags for Users, Buildings and Customers. This feature helps organize information but is optional.
- Review the preset Roles for the audit program and modify the permissions based upon your company preference
- Utilize the Tags you have created & Roles when you add a User, Building or Customer.

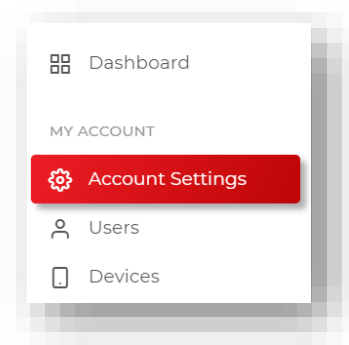
### 3. Prepare & Send Audits

- Create Building Profiles and send audits to your team by utilizing the Schedule feature. This tool sends an audit to Users mobile app.

# Detailed: How To Setup Account Settings

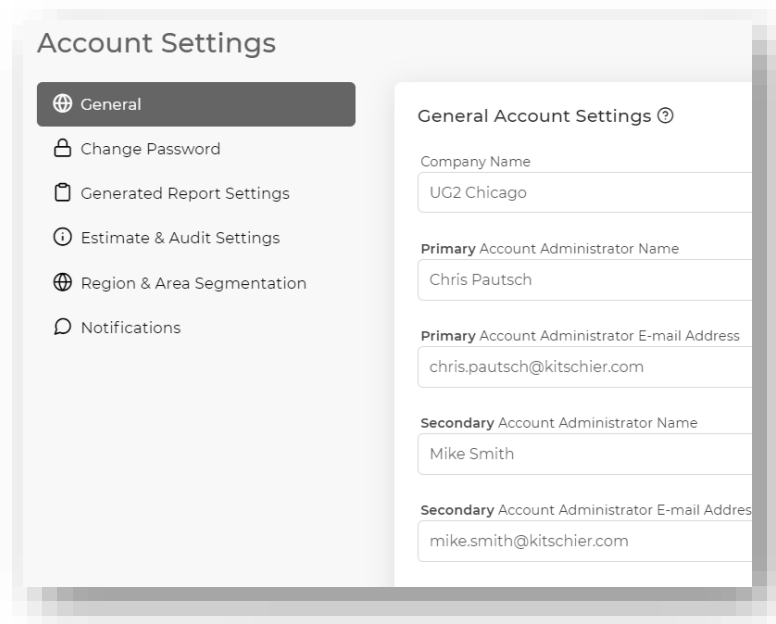
**Faciliscan Admin. Site:** <https://admin.faciliscan.com/>

Manage all audit settings, users, notifications & scheduling from the admin. site. View scores, analytics & output reports.



## 1) General

- Admin. - Input Primary & Secondary Account Contact Details.

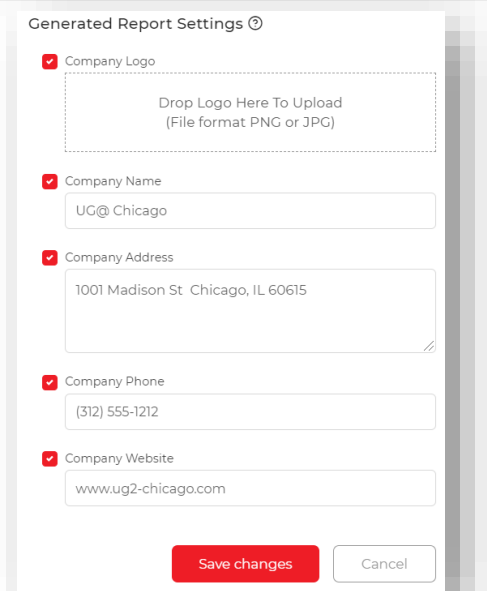


## 2) Change Password

- Change admin. account password if needed.

## 3) Generated Report Settings

- Add Company Info that you want shown on the report:
  - Upload Company Logo
  - Company Name
  - Company Address
  - Company Website



## Detailed: How To Setup Account Settings

### 3) Estimate & Audit Settings

- **Corrective Action Items**
- **Workloading Time Estimates**
- **Product Recommendations**
  - Choose whether to enable the 3 features listed during an audit.
  - Choose whether to give auditors the preference to turn on/off these features per audit.
- **Scoring Method:**
  - Choose the scoring preset method for your company.
  - Choose whether to allow your auditors to adjust the scoring method for accounts.

The screenshot shows two settings panels. The first panel, 'Corrective Actions', has two toggle switches: 'Do you want suggested corrective action items to be available when performing an audit?' (checked) and 'Do you want to allow the auditor to turn off the corrective action item feature during an audit?' (unchecked). The second panel, 'Workloading Time Estimates', also has two toggle switches: 'Do you want to include workloading time estimates?' (checked) and 'Do you want to allow the auditor to turn off workloading time estimates during an audit?' (unchecked).

The screenshot shows the 'Audit Scoring Settings' panel. It includes a text description: 'The scoring format you choose will be the automatic preset for all audits completed by your company. This scoring format will correlate with trends & data. Please choose one.' Below this are three radio button options: 'Pass / Fail', '1 to 3', and '1 to 5' (selected). A row of colored buttons represents the scoring scale: 1 (red), 2 (orange), 3 (yellow), 4 (green), 5 (dark green), and N/A (grey). At the bottom, there is a toggle switch for 'Do you want to allow auditors the option to change the scoring format for individual audits?' which is currently unchecked.

### 4) Region & Area Segmentation

- Add identifying tags that you'd like to tag users for reporting purposes and collect data.
  - These tags should be custom to your company's structure & descriptions.

The screenshot shows the 'Groups, Regions and Areas' settings panel. It starts with a toggle switch for 'Do you need to provide reports by groups, regions, territories? Please choose all options that apply and add descriptions for reporting purposes.' which is checked. Below this is a section titled 'Create Your Company's Segmentation' with a text prompt: 'Please provide any identifying tags that you'd like to tag users for reporting purposes.' A text input field contains the tags 'Southwest', 'Midwest', and 'East Coast'. At the bottom right, there are 'Save changes' and 'Cancel' buttons.

## Detailed: How To Setup Account Settings

### 4) Mange Notifications

- Choose which notifications you'd like to receive:
  - Billing
  - Audits & Estimate Submissions
  - Scheduled Events
  - New Features

#### Account Settings

🌐 General

🔒 Change Password

📄 Generated Report Settings

📄 Estimate & Audit Settings

🗨 Notifications

##### Billing



Email invoices and payment confirmations

##### Audits & Estimates



Notify me of submitted **Building Estimates**



Notify me of submitted **Building Audits**



Send me weekly scheduled events

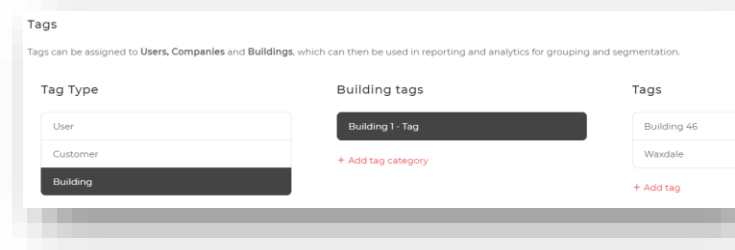


Send me information on new features for **faciliscan™**

# Detailed: How To Create and Utilize Tags & Roles

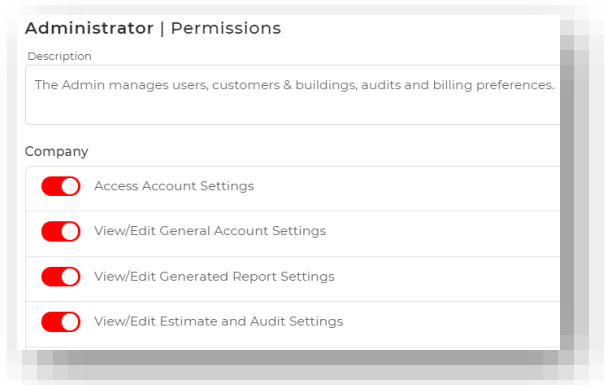
## 1) Create Tags

- Tags are used to help segment reporting, analytics & to control user visibility within your organization
- Tags can be created for **Users, Customers & Buildings**
  - If tags are created for Users, Customers or Buildings, any time those get created a tag can be assigned.



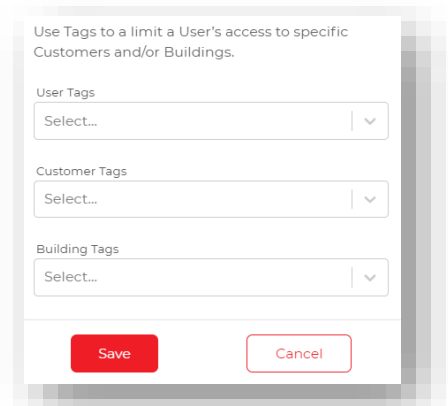
## 2) Review Roles & Make Edits

- Default roles have been created with the typical permissions for: **Auditors**, **Compliance Managers** and **Admins**
  - Review & edit permissions and capabilities for Roles as you see best fit for your company
- New roles can be created, named & modified to align with your organization's specific requirements



## 3) Utilize Roles & Tags

- If you created Tags, they can be utilized and assigned throughout the program. Example, if you +Add a New User, you can assign an existing tag to that user and give them a Role. Tags control the Users visibility to audit info



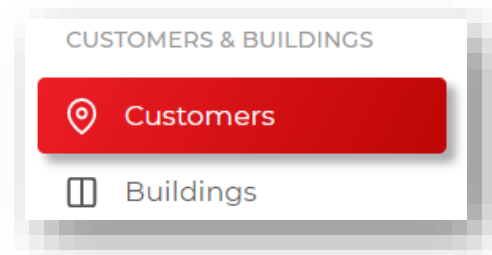
# Detailed: How To Create Building Audit Template

**Faciliscan Admin. Site:** <https://admin.faciliscan.com/>

Create an account or use an existing account & **add a Building Profile.**

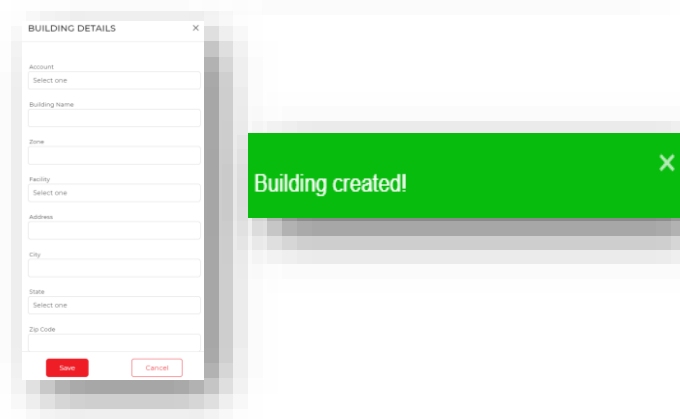
## 1) Go To The Customers Tab

- Click “+ADD NEW” if this customer does not already exist. If the customer already exists, bypass this step.



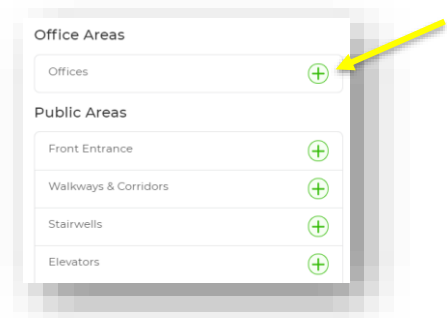
## 2) Go To Buildings Tab

- Click “+ADD NEW”
- Fill out **Building Details** column
- Click Save
- See green pop-up “Building Created!”



## 3) Create Building Audit Profile

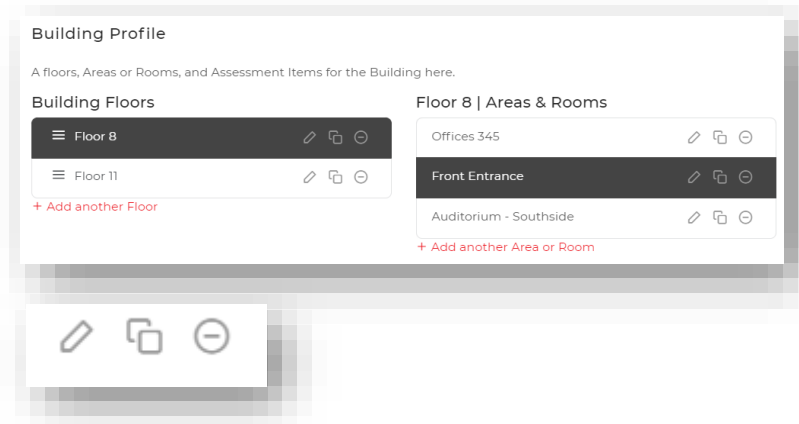
- Choose scoring method
- Add Floors and quantities of Areas & Rooms to audit by clicking **Green** addition buttons



## 4) Edit Floors, Areas & Rooms

Choose any floor/area/item you'd like to edit – it will highlight in gray

- Edit name descriptions by clicking the pencil icon
- Copy & duplicate floors or areas by clicking the double icon
- Delete by clicking the subtract icon



# Detailed: How To Review Audit Scores

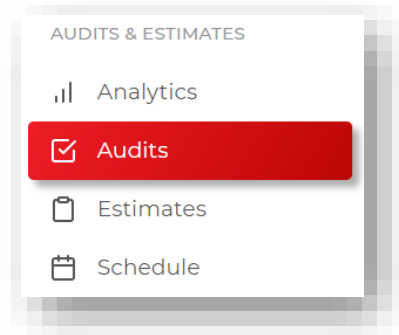
**Faciliscan Admin. Site:** <https://admin.faciliscan.com/>

Review submitted audit results and audit score analytics over a period of time.

## A) Review Individual Audit Reports:

### 1) Go To The Audits Tab

- In the admin. site, go to the left side of the navigation bar and scroll down & click **Audits**



### 2) Choose Audit to Review

- Find the specific building audit by filtering or searching by:
  - Account
  - Building
  - Area/Zone
  - Audit Date
  - Auditor

<input type="checkbox"/>	COMPANY	BUILDING	AREA/ZONE	AUDIT DATE	AUDITOR	ACTION
<input type="checkbox"/>	City Plaza	500 W Madison	Floors 2-7, 9,11	04/12/2020	Chris Pautsch	
<input type="checkbox"/>	District 230	Carl Sandburg HS	Entire Building	05/06/2020	Chris Pautsch	
<input type="checkbox"/>	District 230	Stagg HS	Entire Building	05/06/2020	Chris Pautsch	

- Click the eye icon in the far-right ACTION column.



### 3) Review Audit Report

- Look at topline scores, averages or specific detail of items within audit. Data available to review:
  - Charts & Tables
  - Average Area Scores
  - Workloading

**District 230**  
 Carl Sandburg H.S.  
 13100 La Grange Road  
 Orland Park, IL 60462

Audit Date	Building/Area/Zone	Score
05/04/2020	Entire Building	4.25
11/23/2019	Entire Building	3.95
07/13/2019	Entire Building	3.33

Audit Date	Building/Area/Zone	Score
------------	--------------------	-------

Location: Floors 1, 2, 5, 8-10    Audit Date: 04/01/2020    Auditor: Chris Pautsch

High Visibility Areas & Items

- GOOD Entrance
- BAD Floors
- GOOD Restroom
- OK Trash

**Overall Score**

**4.25**

Earned Score: 109    Maximum Score: 150

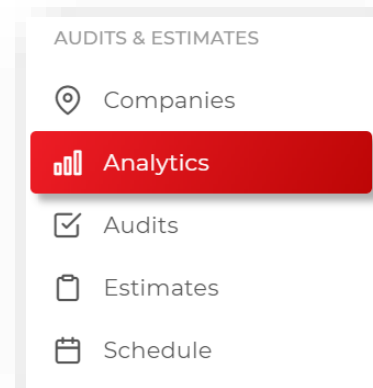


# Detailed: How To Review Audit Scores

## B) Review Analytics Audit Reports:

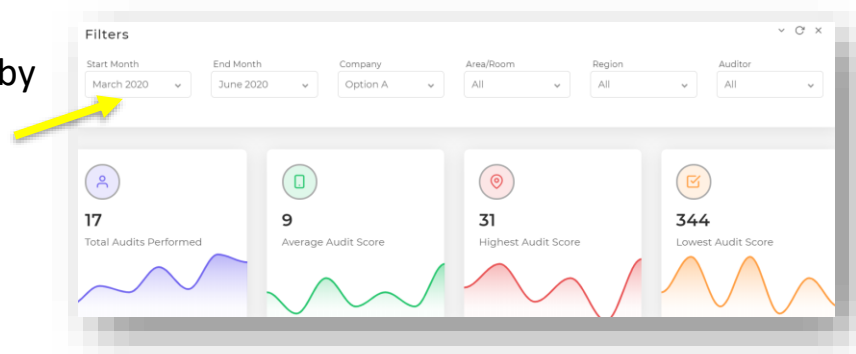
### 1) Go To The Analytics Tab

- In the admin. site, go to the left side of the navigation bar and scroll down to **Analytics**



### 2) Engage With Filters

- Find scoring data & averages by filtering:
  - Time Periods
  - Accounts
  - Area/Room
  - Region
  - Auditor



### 3) Review Data Table

- Look at topline scores & averages or specific detail scores of items within audit.  
 Data available to review:

- Charts & Tables
- Average Area Scores
- Workloading

DATE	ACCOUNT/BUILDING	AREA/ZONE	AUDITOR	SCORE	STATUS
04/01/2020	Equity Properties, Inc. 44 Town Square Drive	Entire Building	Brooke Eldrich	91 / 120	Submitted
04/01/2020	District 230 Carl Sandburg H.S.	Entire Building	Jerry Anderson	421 / 500	Submitted
03/29/2020	CBRE 44 Town Square Drive	West Tower	Brooke Eldrich	421 / 500	Submitted
03/28/2020	CBRE Oak Brook Promenade	Entire Building	Brooke Eldrich	222 / 422	Submitted
03/24/2020	Hamilton Partners 7020 Butterfield Road	Floors 1-3,5,7	Chris Pautsch	444 / 520	Submitted

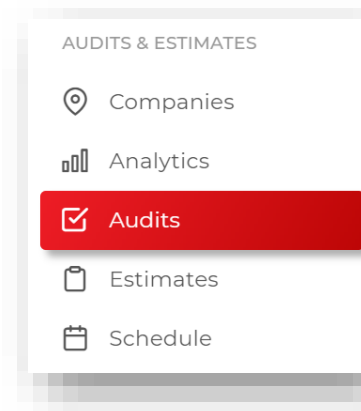
# Detailed: How To Send An Audit Report

**Send Audit Reports:** <https://admin.faciliscan.com/>

Summary or Detailed Reports can be a presentable option to sent to customers, building owners or to the Director of Ops. to review building scores & address any scores with the cleaning crew.

## 1) Go To The Audits Tab

- In the admin. site, go to the left side of the navigation bar and scroll down & click **Audits**



## 2) Choose Audit to Send

- Find the specific building audit by filtering or searching by:
  - Company
  - Building
  - Area/Zone
  - Audit Date
  - Auditor

<input type="checkbox"/>	COMPANY	BUILDING	AREA/ZONE	AUDIT DATE	AUDITOR	ACTION
<input type="checkbox"/>	City Plaza	500 W Madison	Floors 2-7, 9,11	04/12/2020	Chris Pautsch	
<input type="checkbox"/>	District 230	Carl Sandburg HS	Entire Building	05/06/2020	Chris Pautsch	
<input type="checkbox"/>	District 230	Stagg HS	Entire Building	05/06/2020	Chris Pautsch	

- Click the mail icon in the far right ACTION column.



## 3) Add Recipients, Choose Report Format

- Add email addresses of the report recipients
- Choose whether to send recipients the **Summary Report** or **Detailed Report** & click send

Recipient Email Address(es) \*

Separate multiple email addresses using the semicolon character.

Subject \*

Message \*

Attached is the audit performed for property on date.

Report Format\*

Summary  Detailed

**Summary Report** will display topline scores correlated with audit, including: Total Areas, Score Breakdown, and Overall Score.  
[Preview Summary Report](#)

**Detailed Report** will display all details correlated with audit, including: Total Areas and Items, Item Rating, Workloading, and Auditor Comments  
[Preview Detailed Report](#)

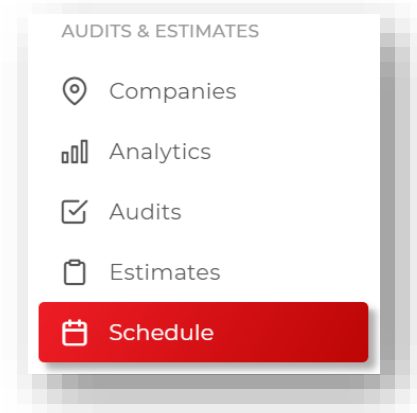
# Detailed: How To Schedule An Audit

**Schedule Building Audit:** <https://admin.faciliscan.com/>

Tag an auditors and an existing building to schedule a new building estimate or audit in the calendar.

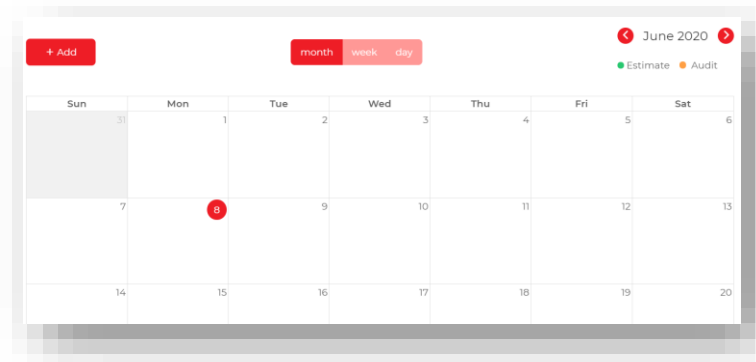
## 1) Go To The Schedule Tab

- In the admin. site, go to the left side of the navigation bar and scroll down & click **Schedule**



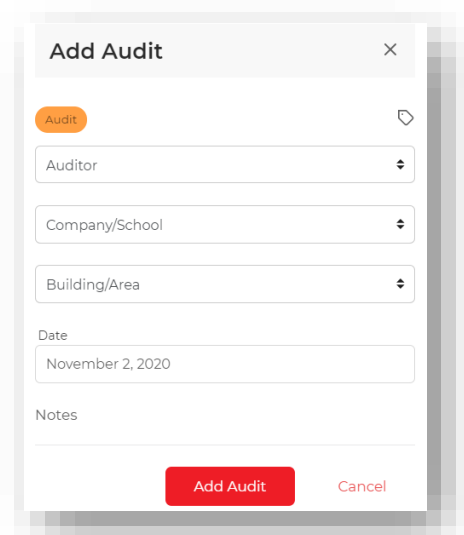
## 2) Choose Date to Schedule Audit / Estimate

- Navigate through calendar and choose a day to schedule the audit/estimate
- Click +Add or click on a date



## 3) Tag Auditors & Building

- Click the drop-downs and choose:
  - Auditor
  - Company / School
  - Building Area (If there's multiple zones)
  - Date
- Click "ADD AUDIT"



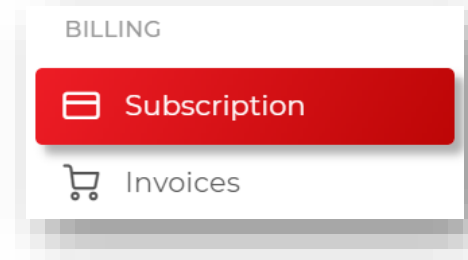
# Detailed: How To Manage Subscriptions & Invoices

**Faciliscan Subscriptions** <https://admin.faciliscan.com/>

Manage your subscription preferences from the faciliscan Admin. Site. Increase subscription package and set billing preferences. Navigate to the Subscription tab to begin.

## 1) Choose Subscription Level

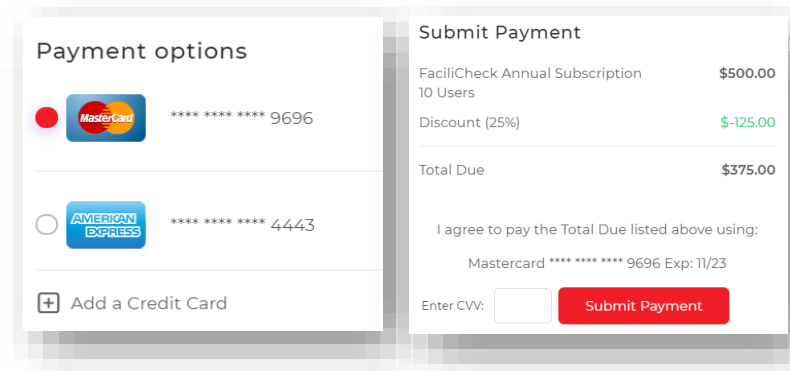
- 4 subscription levels are available. Each level allows you “x” amount of users for a specific cost. Subscription options include:
  - Small
  - Medium
  - Large
  - Unlimited
- Choose one



Small	Medium	Large	Unlimited
10 Mobile App Users Annual Subscription \$500	25 Mobile App Users Annual Subscription \$1,000	50 Mobile App Users Annual Subscription \$1,500	5 Mobile App Users Annual Subscription \$2,500

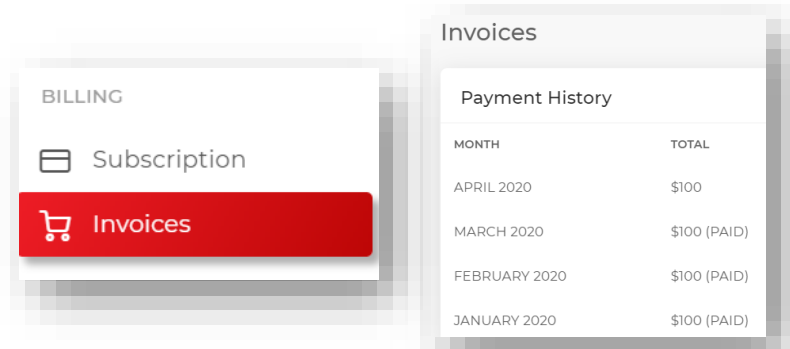
## 2) Add Credit Card Info

- Input the credit card info that you would like to use for faciliscan subscription payments
- Submit payment



## 3) Review / Print Invoices

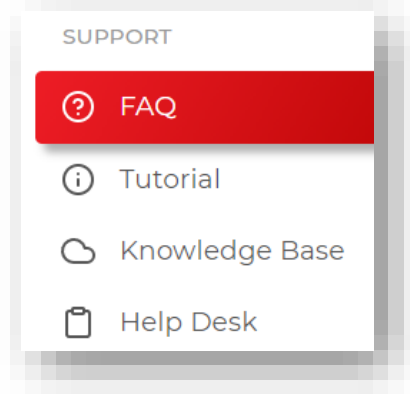
- Go to **Invoices** tab
- Click on any past invoice to review and/or print



# Detailed: How To Utilize Support

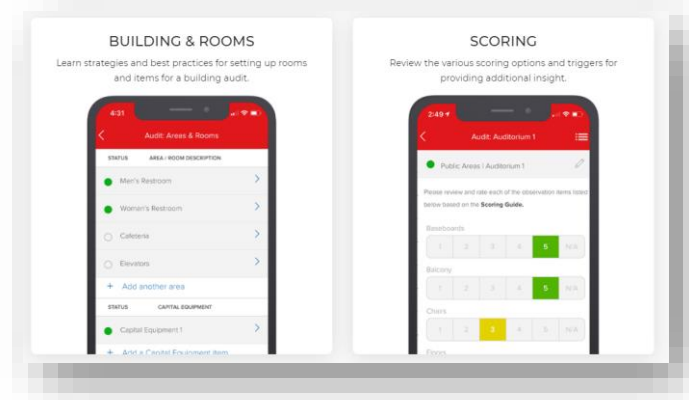
## 1) FAQ Tab

- Review popular questions in regard to:
  - Mobile App
  - Admin Site
  - Users & Devices



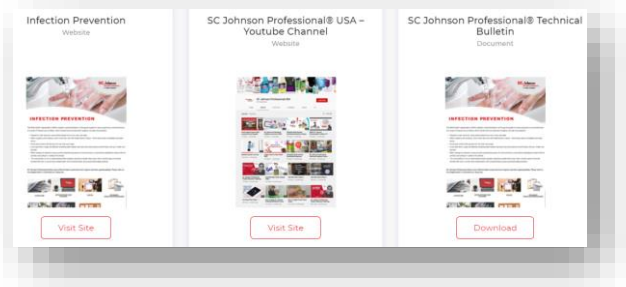
## 2) Tutorial Tab

- Review all steps and screens on how to conduct an audit and submit results to the admin site.



## 3) Knowledge Base

- Review SC Johnson Professional support materials (Videos, SOP's, Wall Charts)



## 4) Help Desk

- If you have questions that are not answered within the tutorials or FAQ's, reach out to an SC Johnson Professional Faciliscan admin & send an email.

**Need help?**  
Send us a message and our support team will get back to you ASAP.

First Name  Last Name

Company Name

Email Address