SCJohnson PROFESSIONAL
A Family Company™

faciliscan™ User Guide – Table of Contents

faciliscan™

faciliscan™ Admin Site Instructions

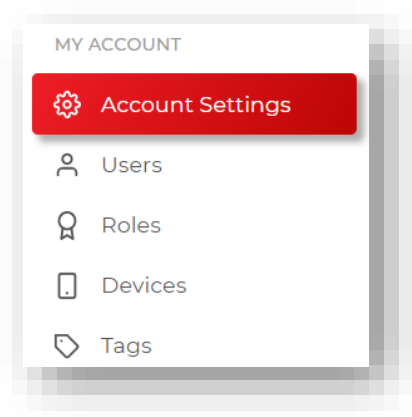
SC Johnson PROFESSIONAL A Family Company™

[Back to Table of Contents](#)

Quick Card: How To Setup faciliscan™ Program

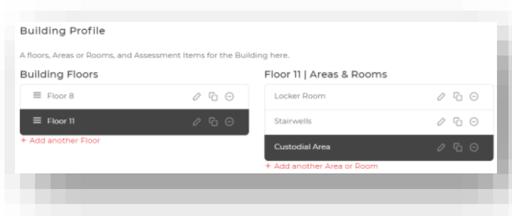
Get Started with faciliscan™ by setting up Your Account:

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.

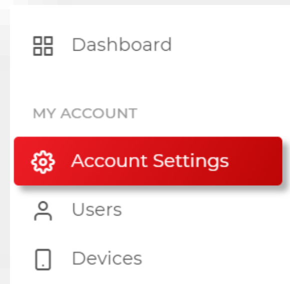
3. Prepare & Send Audits

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

SC Johnson PROFESSIONAL. A Family Company™

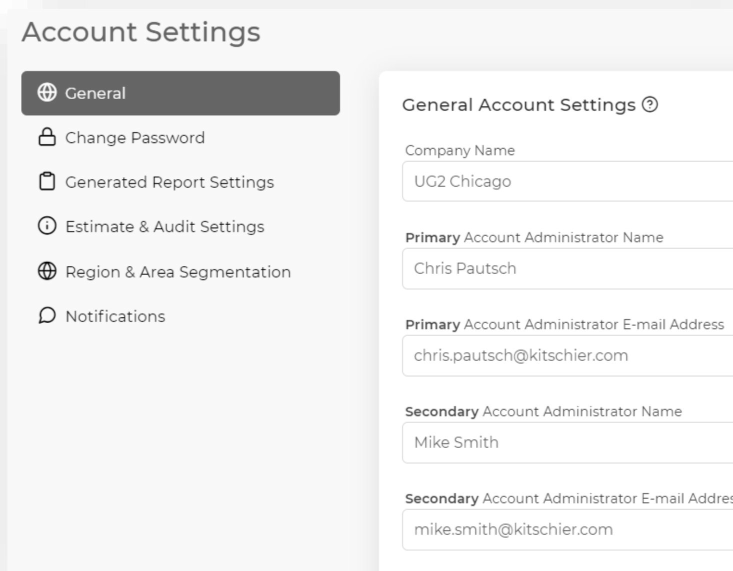
Detailed: How To Setup Account Settings

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.

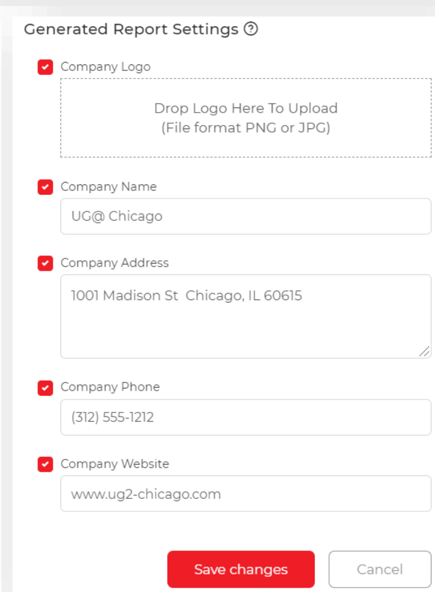


2) Change Password

- 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

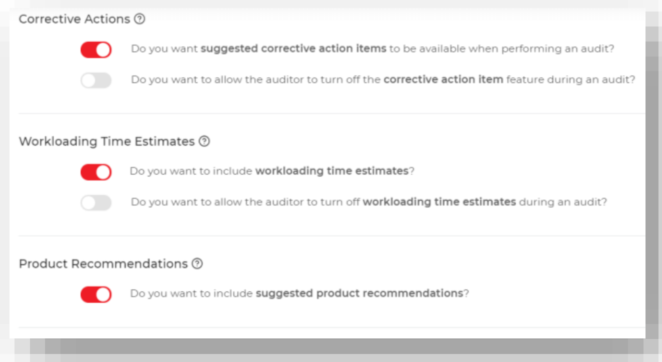


SC Johnson PROFESSIONAL. A Family Company™

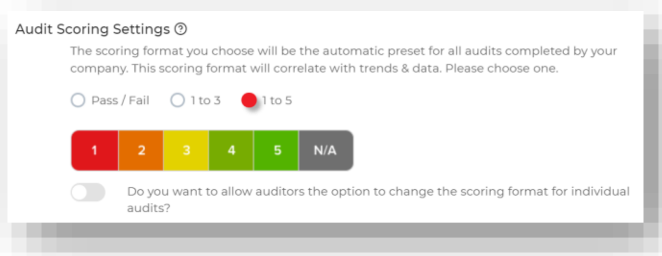
Detailed: How To Setup Account Settings

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.

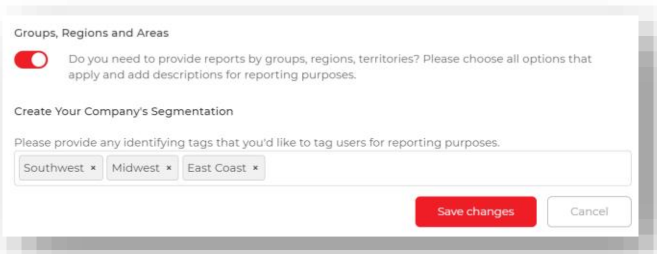


- **Scoring Method:**
  - Choose the scoring preset method for your company.
  - Choose whether to allow your auditors to adjust the scoring method for accounts.



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.

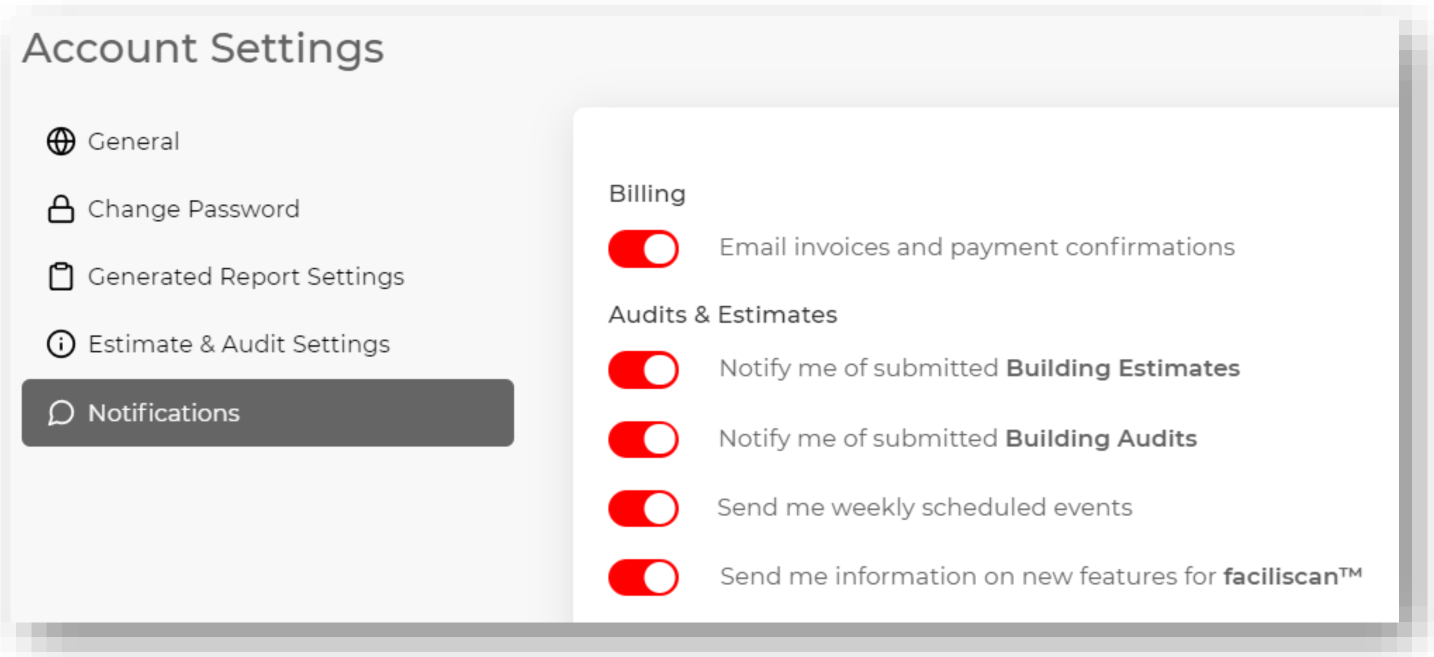


[Back to Table of Contents]

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**

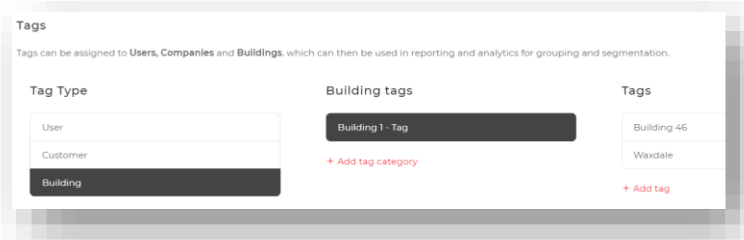


SCJohnson PROFESSIONAL® A Family Company™

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

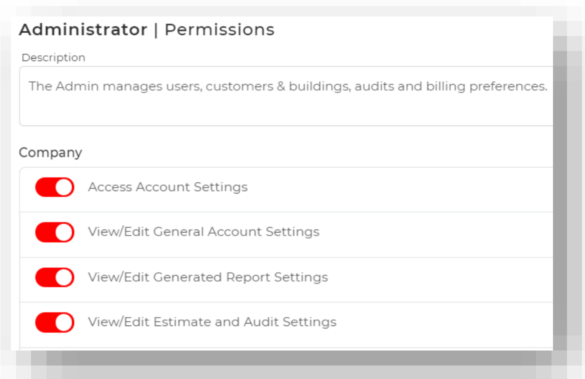


- Tags can be created for **Users**, **Customers** & **Buildings**

  - If tags are created for Users, Customers or Buildings, any time those get created a tag can be assigned.

2) Review Roles & Make Edits

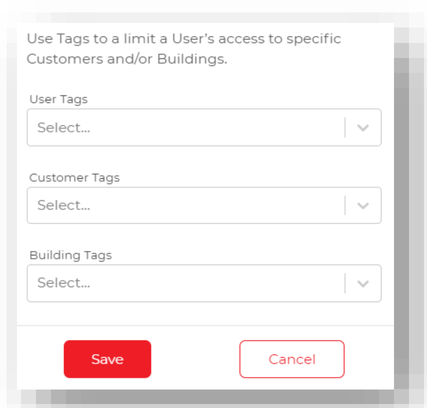
- Default roles have been created with the typical permissions for: **Auditors**, **Compliance Managers** and **Admins**



  - 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

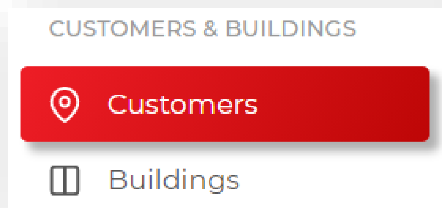
Back to Table of Contents

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.**

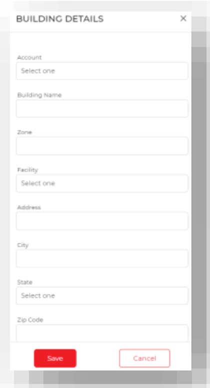
1) Go To The Customers Tab

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



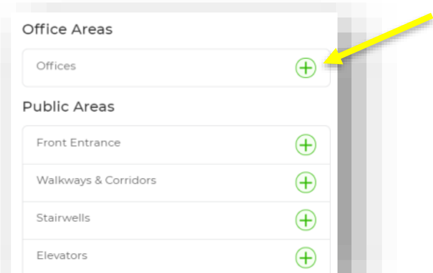
2) Go To Buildings Tab

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



3) Create Building Audit Profile

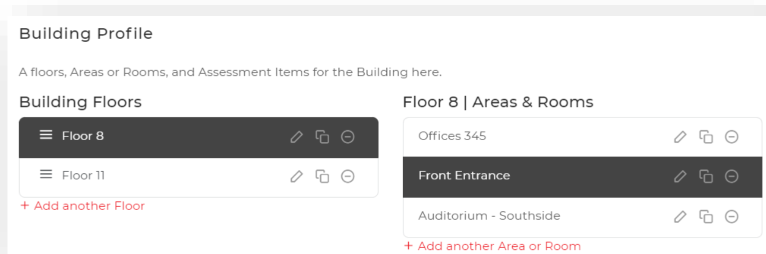
- Choose scoring method
- Add Floors and quantities of Areas & Rooms to audit by clicking **Green** addition buttons



4) Edit Floors, Areas & Rooms

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

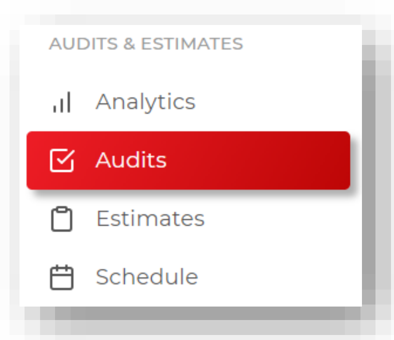
- Edit name descriptions by clicking the pencil icon
- Copy & duplicate floors or areas by clicking the double icon
- Delete by clicking the subtract icon



Detailed: How To Review Audit Scores

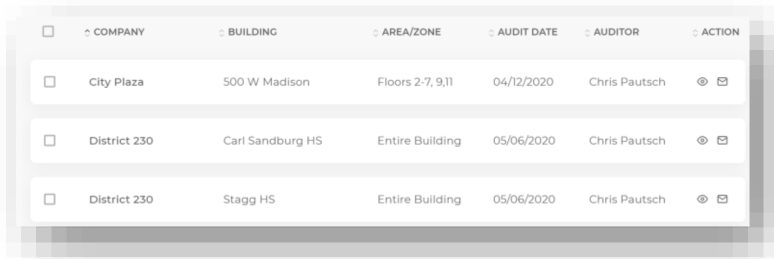
Faciliscan Admin. Site: https://admin.faciliscan.com/
Review submitted audit results and audit score analytics over a period of time.

A) Review Individual Audit Reports:



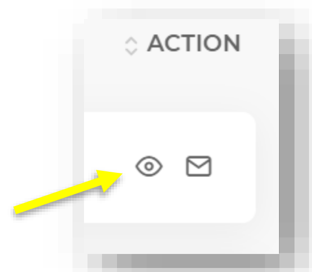
1) Go To The Audits Tab

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



2) Choose Audit to Review

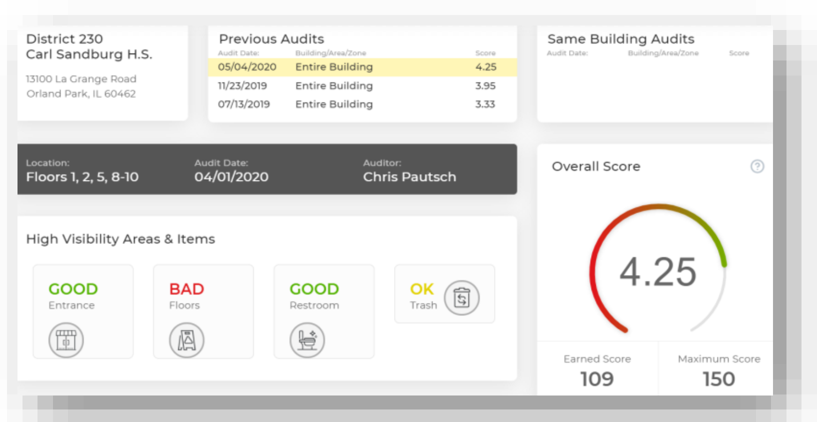
- Find the specific building audit by filtering or searching by:
  - Account
  - Building
  - Area/Zone
  - Audit Date
  - Auditor



- 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



SC Johnson PROFESSIONAL. A Family Company™

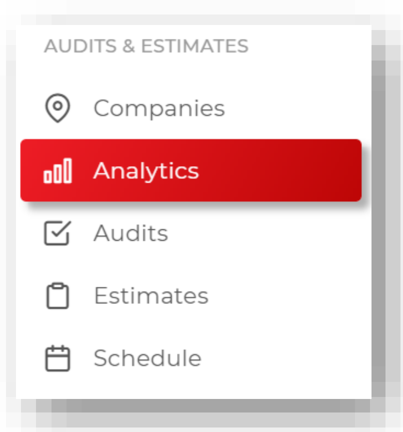
[Back to Table of Contents](#)

Detailed: How To Review Audit Scores

B) Review Analytics Audit Reports:

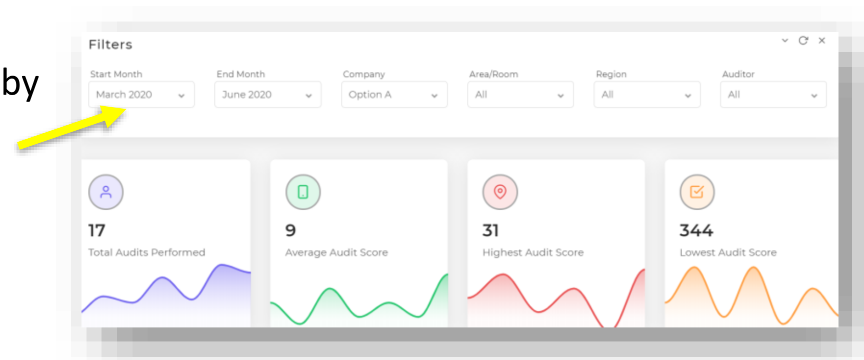
1) Go To The Analytics Tab

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



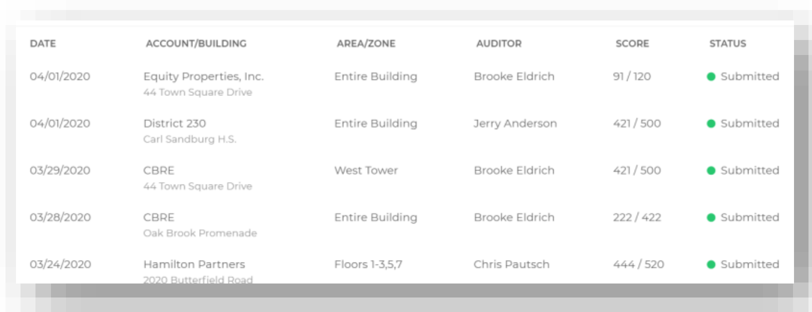
2) Engage With Filters

- 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

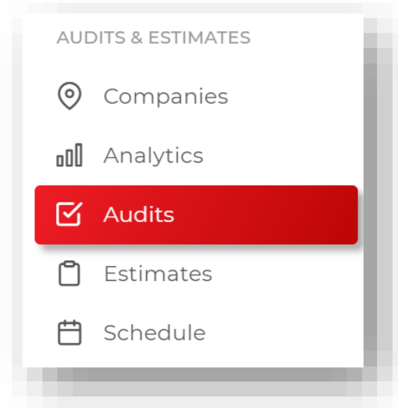


Back to Table of Contents

Detailed: How To Send An Audit Report

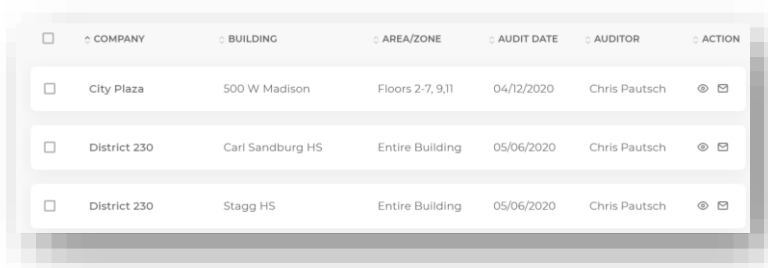
Send Audit Reports: https://admin.faciliscan.com/
Summary or Detailed Reports can be a presentable option to sent to customers, building owners or to the Director of Ops. to review building scores & address any scores with the cleaning crew.

1) Go To The Audits Tab

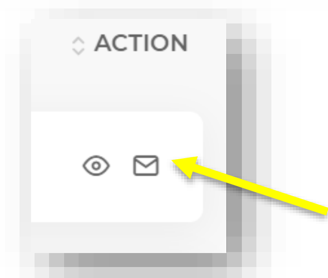


- In the admin. site, go to the left side of the navigation bar and scroll down & click **Audits**

2) Choose Audit to Send

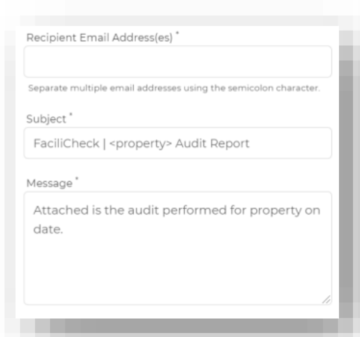


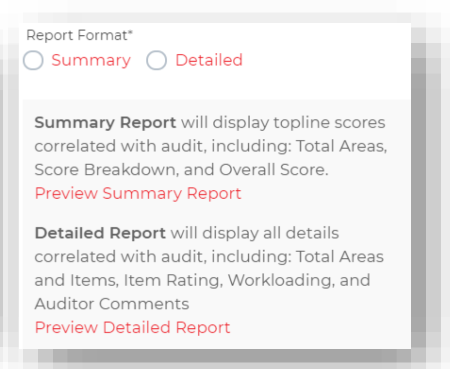
- Find the specific building audit by filtering or searching by:
  - Company
  - Building
  - Area/Zone
  - Audit Date
  - Auditor



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

3) Add Recipients, Choose Report Format





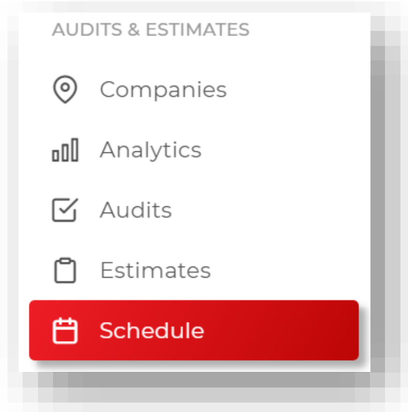
- Add email addresses of the report recipients

- Choose whether to send recipients the **Summary Report** or **Detailed Report** & click send

Detailed: How To Schedule An Audit

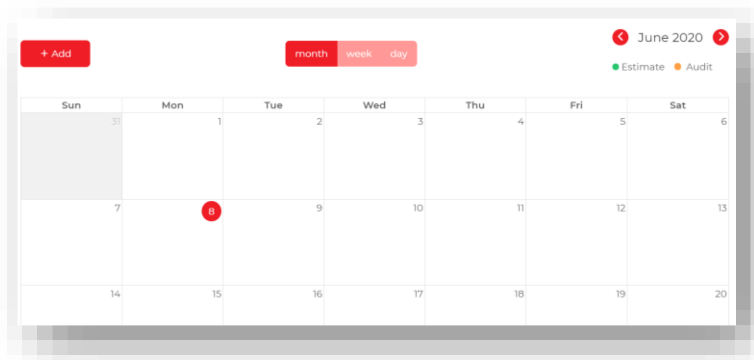
Schedule Building Audit: https://admin.faciliscan.com/
Tag an auditors and an existing building to schedule a new building estimate or audit in the calendar.

1) Go To The Schedule Tab



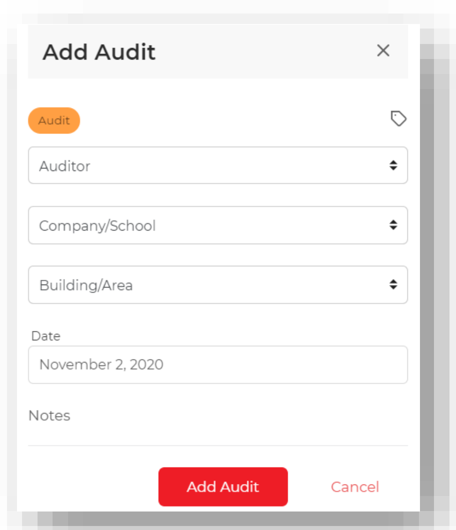
- In the admin. site, go to the left side of the navigation bar and scroll down & click **Schedule**

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

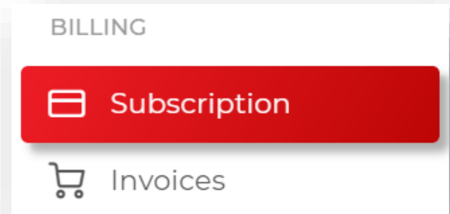


- Click the drop-downs and choose:
  - Auditor
  - Company / School
  - Building Area (If there's multiple zones)
  - Date
- Click "ADD AUDIT"

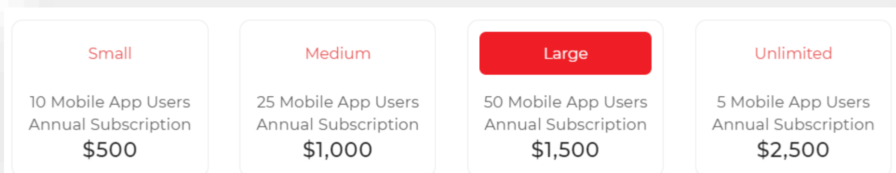
Detailed: How To Manage Subscriptions & Invoices

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

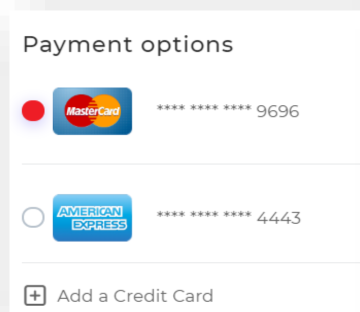


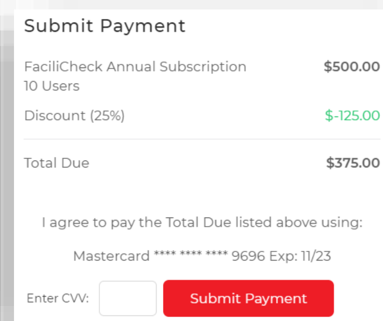
- 4 subscription levels are available. Each level allows you “x” amount of users for a specific cost. Subscription options include:
  - Small
  - Medium
  - Large
  - Unlimited



- Choose one

2) Add Credit Card Info

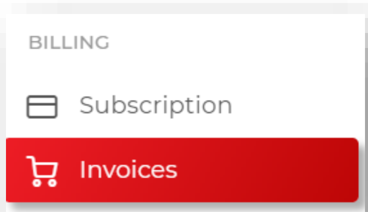


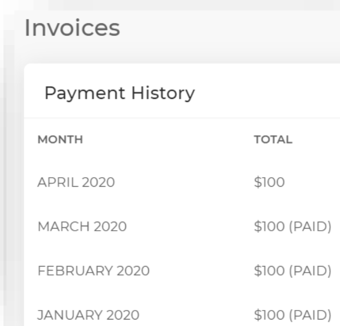


- Input the credit card info that you would like to use for faciliscan subscription payments
- Submit payment

3) Review / Print Invoices

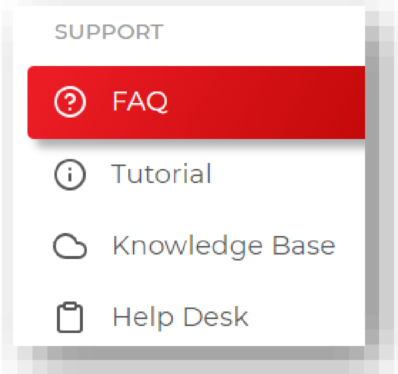
- Go to **Invoices** tab
- Click on any past invoice to review and/or print





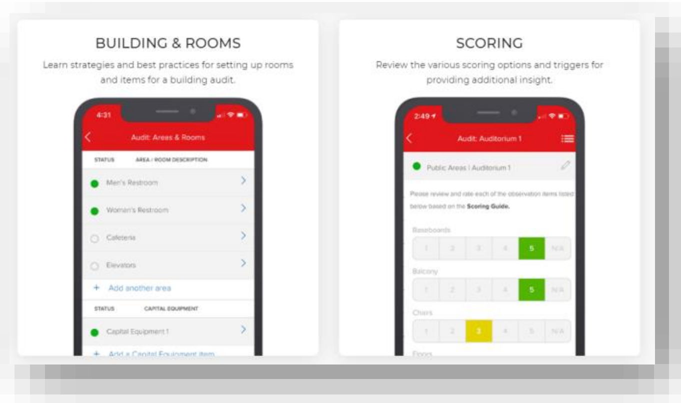
Detailed: How To Utilize Support

1) FAQ Tab



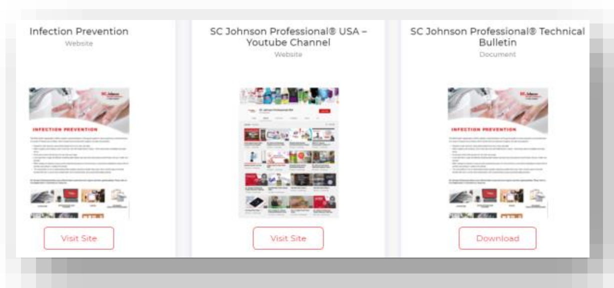
- Review popular questions in regard to:
  - Mobile App
  - Admin Site
  - Users & Devices

2) Tutorial Tab



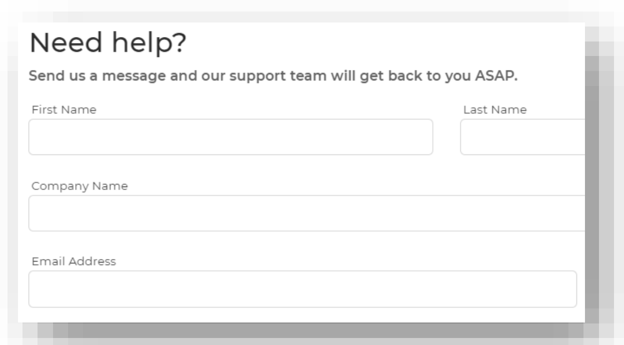
- Review all steps and screens on how to conduct an audit and submit results to the admin site.

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.