



socialmediacheck.com



Social Media Check Portal User Guide

Version 1.0.1

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Client Portal Creation

To create your Social Media Check portal and set up you account there are a few key details needed before you can get started.

Account Creation

We will need the following corporate information to register and setup a client portal for you:

- > Your Client Name
- > Initial Token Purchase Amount
- > Account Administrator Name (forename and surname)
- > Your Client Email Address
- > Account Contact Email Address

Account Setup

This information is required so that we can firstly create the account login and secondly, to create automated messages to candidates that administer the Social Media Check reporting system. Your client data will be used in the following ways:

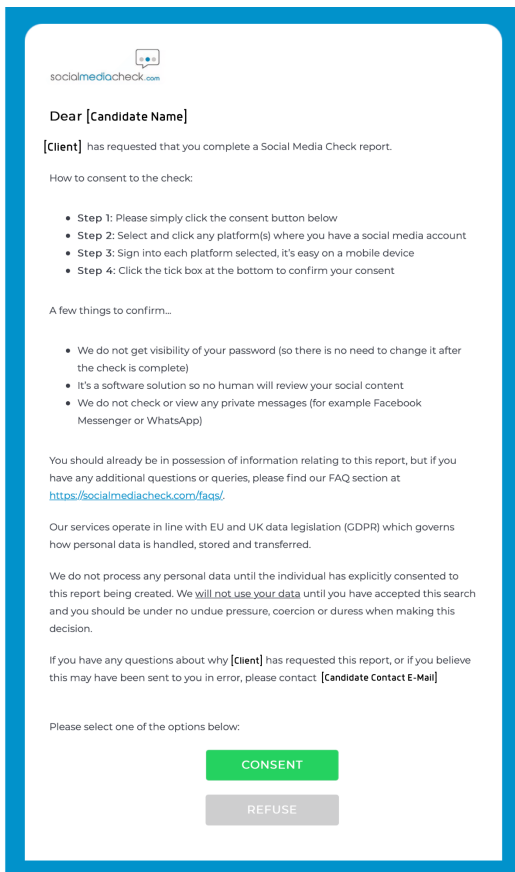
1. Login

- Your client email address will be your username (unless requested otherwise)

2. Candidate Emails

- Our consent and report completion emails will be addressed from [Your Client Name]

- The consent and report completion emails will refer any queries to [Account Administrator Name] at [The Account Contact Email Address] should a candidate have any questions about why you have asked for a report

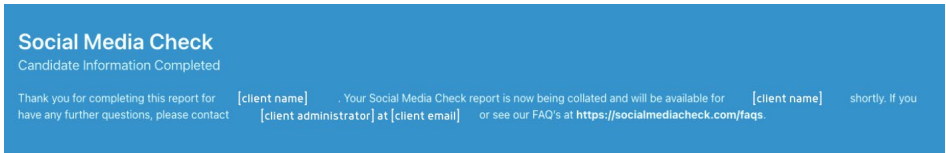




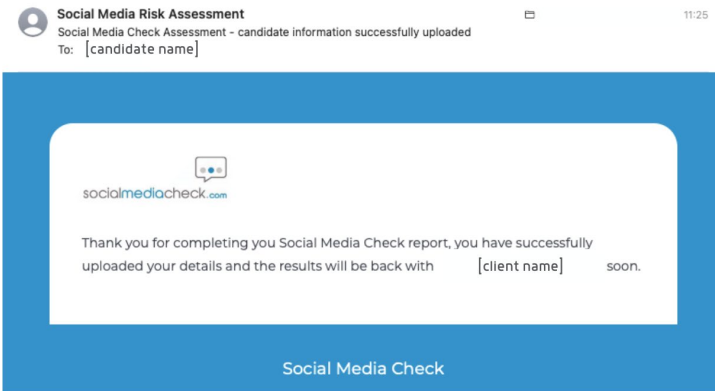
3. Confirmation Messages

When a candidate has completed a Social Media Check report, they are given two messages to confirm this has been done successfully:

- A web page display upon completing their data input:



- An email confirming this action has been successful:

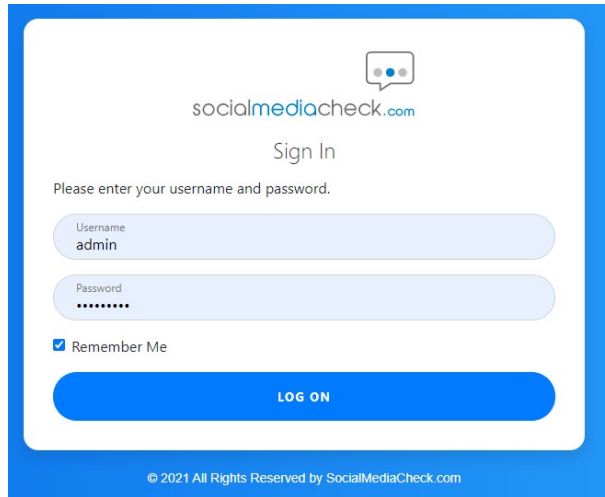


How to access the Social Media Check Portal

To access the Social Media Check Portal you will be provided with a URL along with your individual user credentials (Username & Password) to enable you to access the service. This is typically your email for the username and a password of your choice.

If you do not already have a username and password please contact someone at Social Media Check to sort one out.

Once you have entered the correct username and password click the log in button below and this will bring you to your Social Media Check portal.



The screenshot shows the login interface for socialmediacheck.com. At the top right is the site's logo, a speech bubble with three dots. Below it is the text 'socialmediacheck.com' and 'Sign In'. A prompt reads 'Please enter your username and password.' There are two input fields: 'Username' with the value 'admin' and 'Password' with masked characters '*****'. A checkbox labeled 'Remember Me' is checked. A large blue button at the bottom says 'LOG ON'. At the very bottom, a copyright notice reads '© 2021 All Rights Reserved by SocialMediaCheck.com'.

Note: You can check the 'Remember Me' box to save filling in your username on that device every time you need to sign in.



What is the Social Media Check Portal?

socialmediacheck.com Hello admin Logout

Dashboard 42 credits remaining

Start Date: End Date: Filter Data Clear Filters Upload ... Action *

	Audit	Report	View Cert	Consent Status	Consent Requested	Consent Response	Forename	Surname	DOB	Email Address	Mobile	Excluded Groups	Swearing & Profanity	No. Site
<input type="checkbox"/>	View	PDF	PDF	New	05 Mar 21 17:46	05 Mar 21 17:50	Ben	Hart	13 Jun 82	benjaminhart@live.co.uk	7787223445	0	5	0
<input type="checkbox"/>	View	PDF	PDF	Requested	04 Feb 21 23:26		Ben	Hart	01 Jan 90	ben.hart@socialmediacheck.com	7816913256	0	1	1
<input type="checkbox"/>	View	PDF	PDF	Accepted	03 Feb 21 09:03	10 Mar 21 14:01	Phillip	Stern	01 Jan 70	phillip.stern@outlook.com	7816913256	3	5	0
<input type="checkbox"/>	View	PDF	PDF	New			2Ben	Hart	13 Jun 82	2benjaminhart@live.co.uk	7787223445			
<input type="checkbox"/>	View	PDF	PDF	New			1Ben	Hart	13 Jun 82	1benjaminhart@live.co.uk	7787223445			
<input type="checkbox"/>	View	PDF	PDF	New			Amanda	Patterson	07 Jan 80	mandy1000unicorns@gmail.com	7777777777			
<input type="checkbox"/>	View	PDF	PDF	New			Anna	Smith	05 Jan 80	anna_smith1982_london@gmail.com	7777777777			
<input type="checkbox"/>	View	PDF	PDF	New			Lisa	Sinclair	06 Jan 80	lisa0_sinclair99@hotmail.com	7777777777			
<input type="checkbox"/>	View	PDF	PDF	New			David	Jones	03 Jan 80	david123_jones789@hotmail.co.uk	7777777777			

Page size: 10

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The Social Media Check portal shows a record of all the Social Media Check reports which have been created, completed or uploaded to it. It will display basic user information such as names, email address and date of birth to help to search for records and give you a brief overview of how the subjects who have had reports processed against them were scored on the categories identified by Social Media Check.

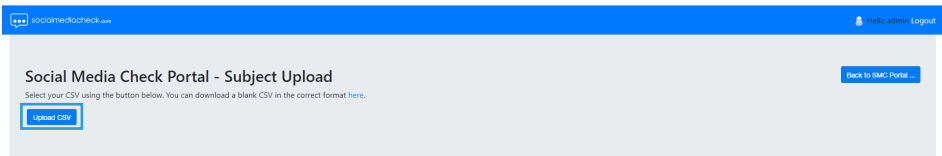
It also provides quick access to an audit of consents and when reports have been run as well as the latest report and certificate for each case so you can easily open and examine the report to see why the subject has scored the points they have in each category.



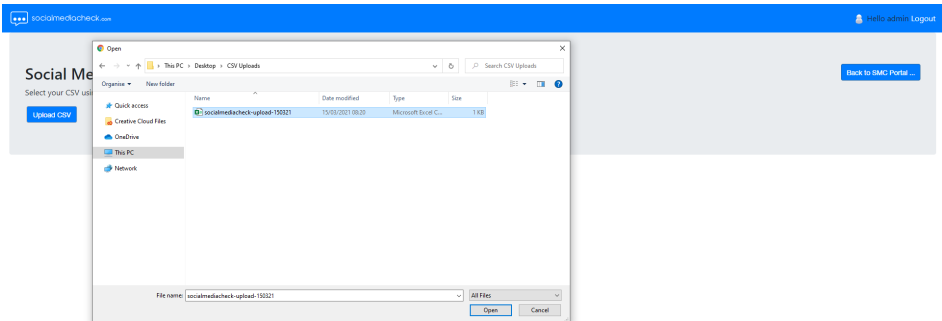
Upload

The upload feature in the Social Media Check portal enables you to upload a CSV file containing rows of new Subjects' details who are yet to be assessed by the Social Media Check system or added to the portal. When this is uploaded the individuals listed in the CSV file are emailed and consent to check their social media is requested.

You can navigate to the Subject Upload page by clicking the 'Upload' button at the top of the portal.



Once at the Subject Upload page you will have the option to 'Upload CSV'. By clicking this the portal will open a file explorer tab enabling you to locate and select the appropriate CSV file. Once the file is selected you can select open and this will upload the contents of the CSV to the portal.



If you do not already have the CSV template format you can open a blank CSV template from the portal by clicking and downloading a blank csv and populating the CSV file from there and then uploading this as above.

You can download a blank CSV in the correct format [here](#).



Section 2

The format of a CSV file is similar to the contents of the data table in the portal whereby after the header row (as provided in the CSV template) each row represents a new data entry. So if you needed to add 3 new subjects and their details to the portal you can do this on one CSV file like below.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Account_c	Region	App_Appl	Forename	Surname	Middle_n	Other_nai	Email_pri	Email_sec	Phone	Date_of_b	Address			
2	123	Central	SK787833f	Benjamin	Hart	Malcolm	Ben	ben.hart@1benjamir	7.57E+09	#####		Mallory House, Mobberley, WA16 7GY			
3	123	Central	SK787833f	Anna	Smith	Lisa		anna.smit	annasmit@	7.12E+09	#####	Goostrey Way, Mobberley, WA16 7GY			
4	123	Central	SK787833f	David	Jones		Dave	david.joni	davyvjone	7.78E+08	#####	Mallory Yard, Mobberley, WA16 7GY			
5															
6															

If you wish to navigate back to the Social Media Check Portal dashboard page you can click 'Back to SMC Portal' and it will take you back to the dashboard.



Action

The action dropdown gives you the ability to perform different actions against a selected row or rows in the portal. You can select which subject's data row(s) you want the action performed against by first checking the checkbox in the second column of the portal to select an individual or by checking the checkbox in the header row to select all visible records. This will highlight any selected rows blue to show you they have been selected.

<input type="checkbox"/>	Audit	Report	View Cert	Consent Status	Consent Requested	Consent Response	Forename	Surname	DOB	Email Address	Mobile	Externist Groups	Sweeping & Profanity	Res Set
<input type="checkbox"/>	View	PDF	PDF	New	05 Mar 21 17:46	05 Mar 21 17:50	Ban	Hart	13 Jun 87	borjammhart@live.co.uk	7787223445	0	5	0
<input type="checkbox"/>	View	PDF	PDF	Requested	04 Feb 21 23:26		Ban	Hart	01 Jan 90	ban.hart@socialmediacheck.com	7816913256	0	1	1
<input type="checkbox"/>	View	PDF	PDF	Accepted	03 Feb 21 08:03	10 Mar 21 14:01	Phillip	Stem	01 Jan 70	phillip.stem@outlook.com	7816913256	3	5	0

Once the row(s) that need an action have been selected you can hover over the action dropdown and select the action from the dropdown list. There are three action types which can be selected and these are;

Request Consent

For the highlighted rows, the 'Request Consent' action will send / resend the consent email and consent SMS for the subject to allow you to gain consent to conduct a Social Media Check assessment against the subject(s). If this has already been sent for an individual this option will send another consent for the user to complete – This second consent request will not deduct a further credit to send.

Email Report

For the highlighted rows, if an assessment has been carried out, the 'Email Report' action will email the subject their latest Social Media Check assessment report PDF that has been completed for the individual.

Archive

For the highlighted rows, the 'Archive' action will remove the record(s) from view and they will no longer be available to search in the portal. An archived user will be reinstated to view in the portal if a re-order has been placed for an individual already archived.

The screenshot shows the Social Media Check dashboard. At the top, there is a navigation bar with the logo, a user profile icon, and a 'Help Admin Logout' link. Below this is a 'Dashboard' header with a '42 credits remaining' indicator. The main area contains a table with columns for Audit, Report, View Cert, Consent Status, Consent Requested, Consent Response, Forename, Surname, DOB, Email Address, Mobile, Externist Groups, Sweeping & Profanity, and Res Set. A dropdown menu is open over the table, showing options for 'Request Consent', 'Email Report', 'Archive', and 'Resend Consent'. The table contains several rows of data, with some rows highlighted in blue to indicate they are selected.



Searching for Records

Social Media Check includes various mechanisms to enable you to quickly and easily filter and refine the data presented in the portal so you are only shown the data you are interested in.

Date Filter

One of which mechanisms is the date filter.

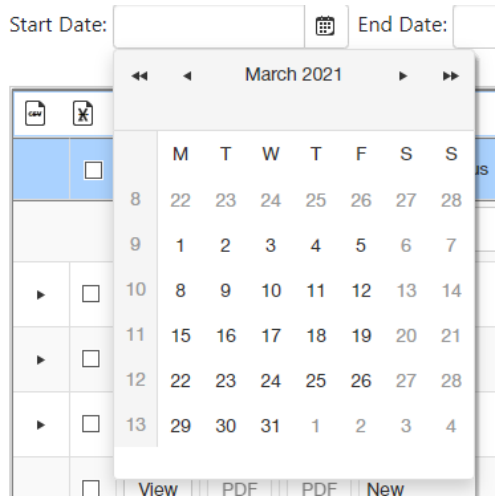
Start Date:  End Date: 

The date filter located in the top left of the portal enables you to search for records which have been submitted to the portal within a date range. This enables a start and end date to be specified which will return records which have been submitted within the date period selected.

You can input the date range in two ways. One way is to select the input box and input the date in a dd/mm/yyyy or dd/mm/yy format.

Alternatively, you can click on the calendar icon next to the input box and select a date manually from here.

Once you have entered both dates that you wish to filter on, you can press the 'Filter Date' button and this will update the records below to only display the records within the date range selected.





Column Filters

The columns in the table which can have a filter applied have an input field and filter button below them. To use this function, you will need to type some text into the input box under the header column which you wish to filter on and click the filter button next to it. This will provide you with some options on how you wish to filter the data.

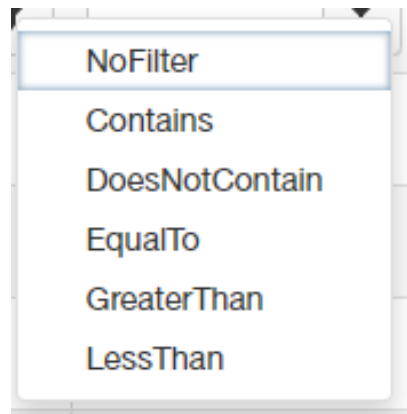


> **No Filter** – Removes the filter from the selected column

> **Contains** – Displays any records that contain the text that has been entered but not limited to just the text entered.

> **DoesNotContain** – Displays any records which do not contain the text that has been entered.

> **EqualTo** – Displays any records where the result is exactly the same as what is entered.



> **GreaterThan** – For text fields this will display the records that are alphabetically succeeding the entered text and for numeric fields this will display any value higher than the one entered.

> **LessThan** - For text fields this will display the records that are alphabetically preceding the entered text and for numeric fields this will display any value lower than the one entered.

This filter function is useful in searching specific user details such as name and email address.



Sort Ascending / Descending

Columns can also be sorted in ascending or descending order. This is done by clicking on the text of a column header. An arrow will appear on that column and the below records will be sorted into ascending order. If you wish to view the records in descending order then click on the column header again until the arrow is pointing down.

Note: Only one column at a time can be sorted using this function.

You can remove this function from all columns again by refreshing the web page but this will also remove all other filters.

Forename ▲
1Ben
2Ben
Amanda
Anna
Ben

Clear Filters

If you wish to clear all filters which have been applied to the portal you can select the 'Clear Filters' button located next to the date filter to remove any filters applied and revert the data back to the standard view.

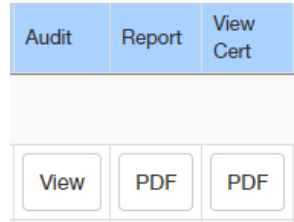
Alternatively, you can refresh the browser page or start a new session to clear any filters applied.

Clear Filters

Viewing Audit & Reports

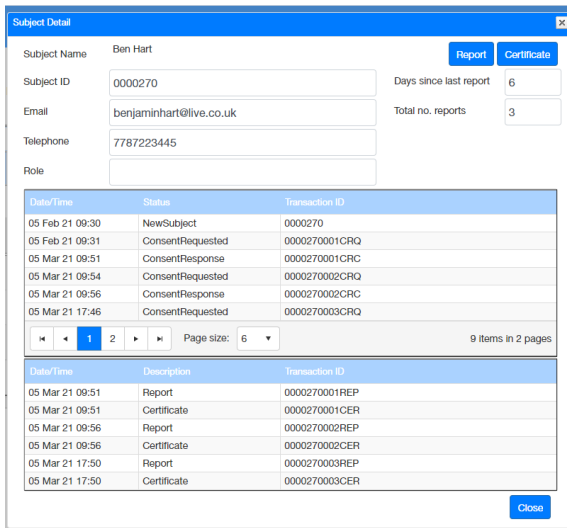
The Social Media Check portal allows you to access a subjects audit trail of when consents and reports have been completed as well as allowing you to view current and previous reports generated against a subject.

On the left side of the portal you will see columns for 'Audit', 'Report' and 'View Cert'. Here you can access the checks that have been completed against the subject.



Audit – This allows you to view the full audit with a date time stamp of when transactions have been completed for that individual record. This includes when consent to complete the Social Media Check assessment has been sent and when the recipient has approved their consent.

This also displays when the Report and Certificate outputs have been completed and generated by the system.



Report – By clicking the 'PDF' button, opens the latest submitted Social Media Check Assessment Report for the subject in the row it's selected on.

View Cert – This is the View Certificate column. By clicking this 'PDF' button, this opens the latest submitted Social Media Risk Certificate for the subject in the row it's selected on.

Note: If consent has not been accepted and no reports have previously been submitted for a subject the PDF button's will be greyed out as there will be no Social Media Check assessments conducted at that time.



Automated Email Chasers

Your account is pre-calibrated to chase any outstanding candidates who you have requested a report from, but who have not completed their part of the process. At the point where you initially request they undertake a report, a consent reminder will be sent to each outstanding candidate every five days until they have completed the report. If a manual chaser / reminder is sent by a client administrator, this will reset the automated consent chaser, and if the report remains outstanding it will be a further five days till another message is sent.

Consent Status

The Consent Status column of the Social Media Check portal allows you to check the status of each subject's consent request. Depending on what the consent status is set to lets you know what action has been taken against that subject.

- > **New** – This indicates that the candidates details have been uploaded successfully into the portal, but no actions have been taken yet to request a report.
- > **Requested** – An order has been successfully placed for a candidate.
- > **Pending** – A consent request has been sent to the candidate but they have not yet accepted or declined the report.
- > **Queued** – The user has selected an action and analysis is underway.
- > **Accepted** – A candidate has accepted the request and completed all aspects they need to.
- > **Declined** – This indicates that the candidate has declined consent for a Social Media Check assessment.
- > **Completed** – The report has been completed and a Social Media Check assessment has been generated.

Consent Status	
<input type="text"/>	▼
Completed	
New	
New	



PDF Report Audit

For records where there have been more than one report carried out against the individual, this arrow will be present in the first column.



When this is clicked it will expand the view below the selected row to display the previous reports carried out for that individual. From here you can open the previously submitted reports as well as the most recent ones carried out against the subject.

This also gives you an overview of how they performed on the Social Media Check assessment criteria between each report carried out

Audit		Report	View Cert	Consent Status	Consent Requested	Consent Response	Forename	Surname	DOB	Email Address	Mobile	Extremist Groups	Swearing & Profanity	No. Se
New				05 Mar 21 17:46		05 Mar 21 17:50	Ben	Hart	13 Jun 82	ben.hart@socialmediacheck.com	7787223445	0	5	0
Report	View Cert	Report Date	Extremist Groups	Swearing & Profanity	Negative Sentiment	Hate Speech	Violent Images	Pornographic Images	Toxic Language	DRA Score	Transaction ID			
PDF	PDF	05 Mar 21 17:50	0	5	0	0	0	0	5	10	0000270003			
PDF	PDF	05 Mar 21 06:56	2	5	4	2	2	2	5	22	0000270002			
PDF	PDF	05 Mar 21 09:01	2	5	4	2	2	2	5	22	0000270001			

Review Status

When the PDF report audit is expanded using the arrow in the first column, you have the option to change the Review Status of the report by clicking the 'Edit' button in the row of the report you are reviewing.

This will expand the window and allow you to assign a Review Status for the report which offers a dropdown list of various options the status can be set to.

Pending is the default Review Status that is applied before the status has been set, the other options define different levels of issues found with the report which can be commented on using the Review Findings text box below which can be viewed to gain insight into why the review status has been set.

View		PDF	PDF	Accepted	04 Feb 21 23:26	Ben	Hart	01 Jan 90	ben.hart@socialmediacheck.com	7816913256	0	1	1
Review	Report	View Cert	Review Status	Report Date	Extremist Groups	Swearing & Profanity	Negative Sentiment	Hate Speech	Violent Images	Pornographic Images	Toxic Language	DRA Score	Transaction ID
Edit	PDF	PDF	Pending	03 Feb 21 08:13	0	1	1	0	0	1	0	3	0000097007
Review Status		<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Review Findings <div style="border: 1px solid #ccc; padding: 2px;"> Pending </div> </div> <ul style="list-style-type: none"> ⊖ Pending ⊖ Serious Issues Found ⊖ Issues Found ⊖ No Issues ⊖ Problem with Report </div>											
<input type="button" value="Save"/> <input type="button" value="Cancel"/>													

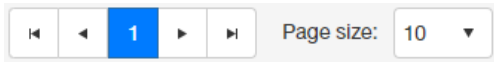
The Review Status is displayed in the far right column of the portal and reports can be filtered based on the status which has been set.



Pagination

The page indicator in the bottom left corner of the table allows you to navigate through the pages of results and records. The page buttons displayed from left to right provide the following functions;

- > First Page – Navigates you to the first page of records.
- > Previous Page – Navigates you to the page previous to the one you are currently viewing.
- > Current Page – Displays the number page of records you are currently viewing.
- > Next Page – Navigates you to the page after the one you are currently viewing.
- > Last Page – Navigates you to the last page of records.



The 'page size' can also be set here, this determines how many records you view per page. This is set to 10 as default but does allow a number of increments.

If you scroll to the right side of the record table at the bottom you will be able to see the number of records in the table / filter and the number of pages these records span.

9 items in 1 pages

Credits


In the top right corner of the Social Media Check portal there is a number displayed which states 'credits remaining'. This value indicates the number of reports you have left to generate on the account.

42 credits remaining

A credit is used when a consent request is sent and returned by a subject which results in a Social Media Check assessment being carried out against that individual. If you need to resend a consent request that hasn't been actioned this would not deduct any credits.

You can add more credits by purchasing more reports from Social Media Check.

Refresh



The refresh icon  located in the top left corner of the portal allows you to refresh the portal to reflect any status changes that have been made to or saved within the Social Media Check portal.

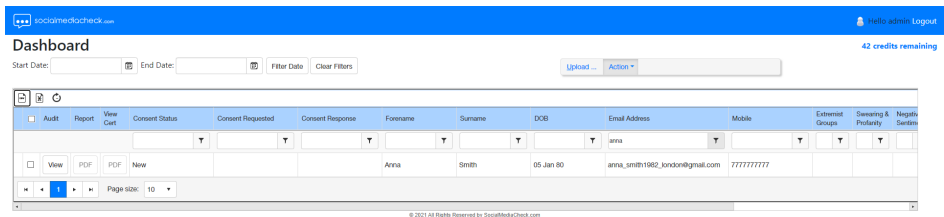


Report Output

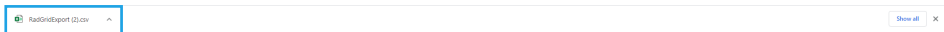
The Social Media Check Portal gives you the option to output the table or a select set of data as a CSV file or Excel file.

To do this you will want to ensure the data being filtered or currently displayed in the Social Media Check portal matches that which you want to export. To refine the data ready for export, use the filtering mechanisms to select only the data relevant to the export before proceeding.

Once this has been done you can select the export CSV button  or export Excel button  in the top left of the table and a file of the selected will be generated and downloaded.



The screenshot shows the 'Dashboard' page of socialmediacheck.com. At the top right, it says 'Hello admin! Logout' and '42 credits remaining'. Below the header, there are filters for 'Start Date', 'End Date', 'Filter Data', and 'Clear Filters', along with an 'Upload ... Action' button. The main content is a table with columns: Audit, Report, View Cert, Consent Status, Consent Requested, Consent Response, Forename, Surname, DOB, Email Address, Mobile, External Groups, Sleeping & Prudently, and Negative Results. A single row of data is visible for 'Anna Smith' with DOB '05 Jan 80', email 'anna_smith1982_london@gmail.com', and mobile '777777777'. Below the table, there are 'View' and 'PDF' buttons, and a 'Page size: 10' dropdown. At the bottom, there is a copyright notice: '© 2014 All Rights Reserved by SocialMediaCheck.com'.

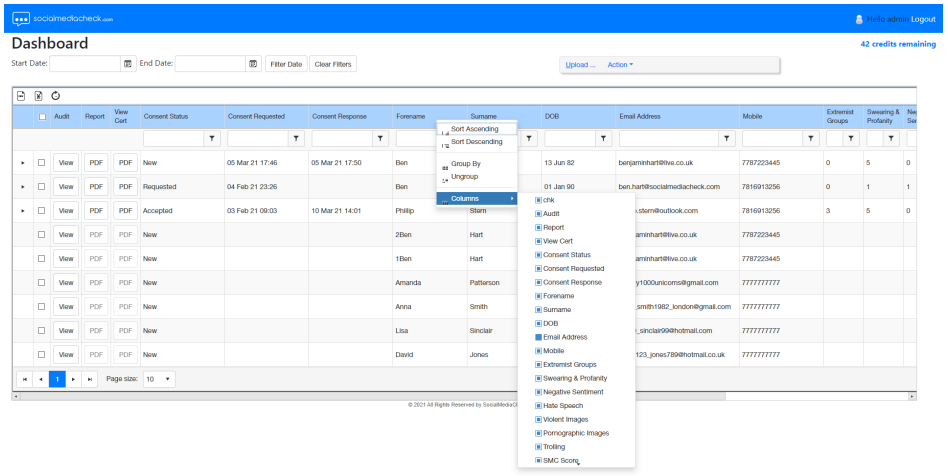


The screenshot shows a file download bar at the bottom of the page. It contains the filename 'RadOnReport (2).csv' and a 'Show all' button with a close icon 'X'.

Display of Columns

In the Social Media Check portal, columns can be hidden from view. This is done by right clicking the mouse while hovering over one of the columns in the portal table. This will bring up the columns tab which when expanded gives you the option to check or uncheck the columns to add or remove them from view.

This will only hide the columns selected until the page is refreshed or the session ends. When you log back in or refresh the page all columns will be displayed again.



You can hide columns from view using this method to only display columns you wish to export as CSV or Excel file by first unchecking the columns that you don't need for the export and then following the steps in the Report Output section of the user guide.

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