

# Consentua Admins Dashboard Guide

Version 3

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## Document Control

Version	Publish Date	Author	Changes
1.0	September 2017	Chris Cooper	
2.0	April 2018	Chris Cooper	New dashboard views
3..0	November 2020	Chris Cooper	Updated screen shots from current dashboard version

## Document Purpose

The Consentua Guide for Admins is intended to show how to set up your Consentua service. What functions are available through the dashboard. What the terms used mean and how to create your own consent templates.

This document is complementary to the Consentua API Installation Guide.

The intended audience is IT architects, developers, business analysts, system administrators and user administrators.

Heads of department, the CIO, DPO and Lead Counsel will gain insight from reading the document into how to exploit Consentua and ensure it delivers the expected outcomes.

Latest Consentua documentation and resources are available via GitHub:  
<https://github.com/Consentua/>

## Why Consentua

Consentua may have been picked for your organisation for a variety of reasons. However, as Consentua does one thing well, (it captures the consent to process personal data from your customers/users), the likelihood is that this first deployment is about personal data. Why? because the General Data Protection Regulation (GDPR) & other regions data regulations demand organisations take responsibility for the personal data on their systems.

GDPR covers many areas, including: the right to be forgotten; the right to know the data held on you; the need for both data processors & data controllers to have a record of your consent. However, when it comes to consent, the rules on this aspect are now more specific.

What this means is that users/customers must have given their consent for personal data to be processed. In many circumstances organisations will have a legitimate interest in having the consent to process personal data (your address so a parcel can be delivered).

However, in other circumstances such as marketing the rules are now much tighter. Allied to the need to adhere to a right to be forgotten and a right to know what personal data is held on your systems means that consent is now more complicated.

Where your organisation wishes to:

- Share the consent with others - (internally & externally)
- Expand the purposes consented over time through a customer journey
- Program the consent interaction as it aids customer insight, trust proofing, audit and control.

Consentua is a universal consent platform. It specialises in having a matrix of purposes. This means:

- A single client consent service can have multiple consent services and templates (a one to many relationship);
- A template can have multiple purposes (a many to many relationship);
- multiple services can share one template (one to many relationship).
- A service can have a single template with a single purpose. (one to one)

Consentua is multilingual out of the box. Use the language setting in the dashboard when setting up the template.

Consentua is interactable across all functions via the [API](#)

The Consentua admin has complete control over the purpose description and this can be delegated to the business owner of the consent request. This alleviates developers from being responsible for the maintenance of the consent content/request/language.

## Where Consentua Works

Consentua was chosen to be used in your organisation because it met one or several of these business requirements. Your...

1. ..organisation wants to have a transparent and easy to understand and swift to use method of capturing consent.
2. ..organisation wants to share the consent record with other data processors. This could be for service delivery, operational or marketing purposes. All of which require a common consent view. Consentua provides this accessible to 3rd parties & internal systems view of consent.
3. ..organisation wants to have a 'global' method of consent capture but a local deployment respecting local language and jurisdiction.
4. ..organisation needs a quick, secure yet easy to install solution. With minimal disruption, but a high impact. Specifically, with GDPR compliance and improved customer satisfaction.
5. ..organisations want a method of capturing consent across multiple systems but want only one user interaction.
6. ...organisation has a need for GDPR compliance today, but wants to use the opportunity to better know their customers. Building trust in your brand through an evolution in customer service.

### Service to Templates Mix

Out of the box flexibility to have different types of consent service be it based on business function or language. Means standardisation is easier to achieve and maintain; accountability along with a clear audit trail can be enforced.

It is possible to create a set of templates that are common across an enterprise. These templates can be applied at a service level with each service representing a different business function. Or a common template with child translations and a consent service per language or country deployment.

Or you can deploy different services and templates to different parts of the user journey, consenting to additional purposes as the need arises. For example at sign up seeking to confirm identity, this uses one service. Then asking for permission to send direct marketing information using a different consent service and template at a later stage in the customer journey.

It is also possible to have a service with multiple templates attached. This could replace the pages of T&C's with each template focused on a different purpose or business function. Being led by the business as they are best placed to articulate how and why personal data is used is the first guide. Second is the utilise the flexibility of Consentua to deliver that transparent description of how personal data is used.

## WebSDK & Deploying your Consent interaction on the user page

The consent form itself is configured via the demo dashboard at

<https://dashboard.consentua.com/>

The typical integration path for an app is to wrap the page you created into a WebView, and to hook that up with the app using whatever webview communication method is supported by your platform - typically the postmessage API or injecting some javascript hooks into the HTML page.

You'll see in the example that Consentua generates a UserID; effectively a token that needs to be stored against the user record in an external system. That token is then used by back-end data processing systems to retrieve the user's live consent status from the Consentua API.

Later invocations of the consent UI need to pass that userID back into the SDK (see the uid variable in the example page), to apply changes to an existing token rather than create a new one.

The API docs for checking consent are at <https://api.consentua.com/> - but if using javascript, then there's a javascript client library that will provide a quicker implementation path, and which I'm more than happy to help integrate. (Code at <https://github.com/Consentua/consentua-client-js/blob/master/consentua-client.js>)

## What Makes a Successful Project?

Heads of business in particular IT, marketing, customer service, legal/compliance and operations are all stakeholders in delivering a successful Consentua deployment.

Prerequisites for a successful Consentua deployment are:

- This requires a team effort - collaboration across lines of business.
- Output from the Privacy Impact Assessment (PIA) is made available, as this is a key input.
- Phased deployment via a test before releasing into production.

From a strategy perspective Consentua can be a facilitator of change. Most organisations evolve, rather than have a revolution. This slower pace of change is a result of practical considerations such as having to keep an existing service and customers happy. Funding and resources available to manage the change, create the new procedures and educate the staff, then advertise this to your users. All takes time.

Therefore, an added USP of Consentua is its flexibility. So as new services are added, outsourced, improved or simply changed. The consent required is likely too as well. Consentua can be updated in real time and the user the next time they interact with Consentua can see the new consent request.

The service can build out from a scenario, data type, new purposes, new jurisdictions and languages perspective.

## What is Consentua?

Consentua is made up of a number of components. An API and a widget that gets installed in your mobile app/browser and a secure data repository.

The widget is available as an SDK for iOS, Android and HTML5.

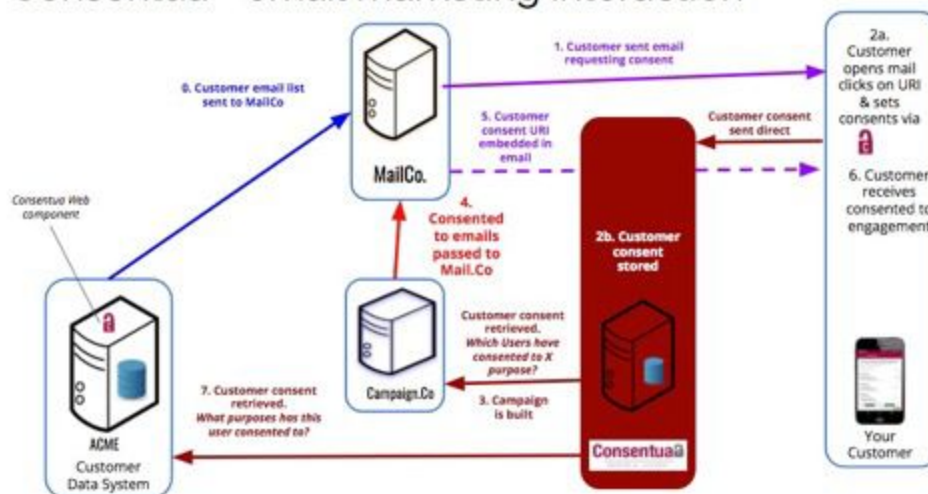
Consentua is designed to be implemented so it is used by citizens, customers/end users. However, Consentua is equally at home being used by a contact centre team member, or a field operative capturing the consent verbally then transcribing this into a digital record.

From a system perspective, Consentua is creating a Consent Receipt that is machine readable. Consentua treats a system as it would any end user. It still requires an access token and be given permission to access that Consent service.

Consentua has at its core the Consent Template. This is where the data type and data purposes are detailed. The Client Consent Service is specific for that Consentua customer. A customer of Consentua can have multiple Client Consent services, (this could be from a jurisdiction perspective, a purpose perspective (employee versus user)).

A Client Consent service can have multiple consent templates. A consent template can have multiple purpose groups, but it must have specific purposes detailed within each purpose group.

## Consentua - email marketing interaction



## Terms & Definitions

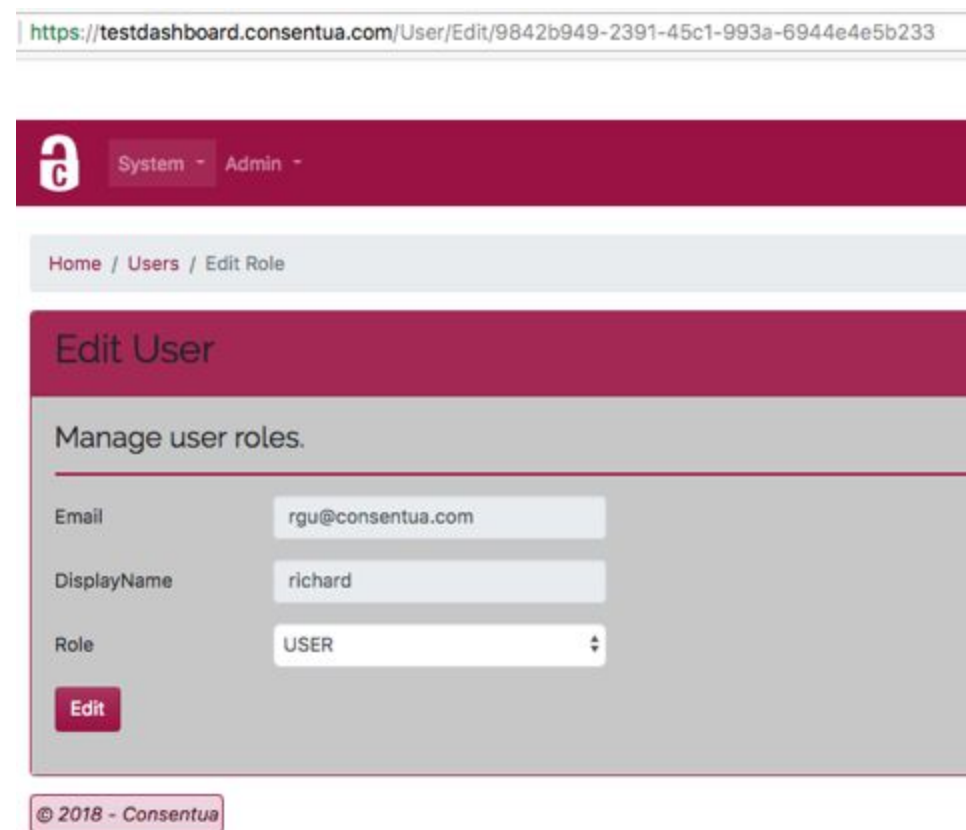
Term	Definition
Consentua	The Consentua Service
API	Application Programming Interface
REST	Representational state transfer
Consent	Permission for something to happen or agreement to do something.
Client	The company using the Consentua service
Service	The service provided by the client to their users
Client User	Users of the Consentua Service registered by a Client
Role	Roles within Consentua that allow access to functionality
User	A User of the Client's Service
Consent Template	The template of consents that Users interact with
Purpose Group	A Group of Purposes
Purpose	The Purpose of the consent, what data will be used and what that data will be used for
MD5	A common hashing algorithm
Consent Registrar	A trusted third party that provides consent management according to the GDPR regulations. Consentua is an example of a Consent Register.
Consent Receipt	A form of exchanging consent records between consent registrar's



## Creating Users

Once the new Consentua Client Service is set up, there are two default roles automatically - ADMIN and USER. The next step for the system admin is to invite the new client service admin to register their name against the new client consent service.

The Consentua system admin will then share with this first client consent service admin their new Consentua API Key. Once the new client consent service admin registers. They need to make themselves an admin. Then log off then log in again.



Note the Register / Login buttons in the top right hand corner (*not shown in picture*)

## Admin Tasks

The admin has some specific tasks once logged into the Consentua dashboard. This is where they will undertake a number of tasks:

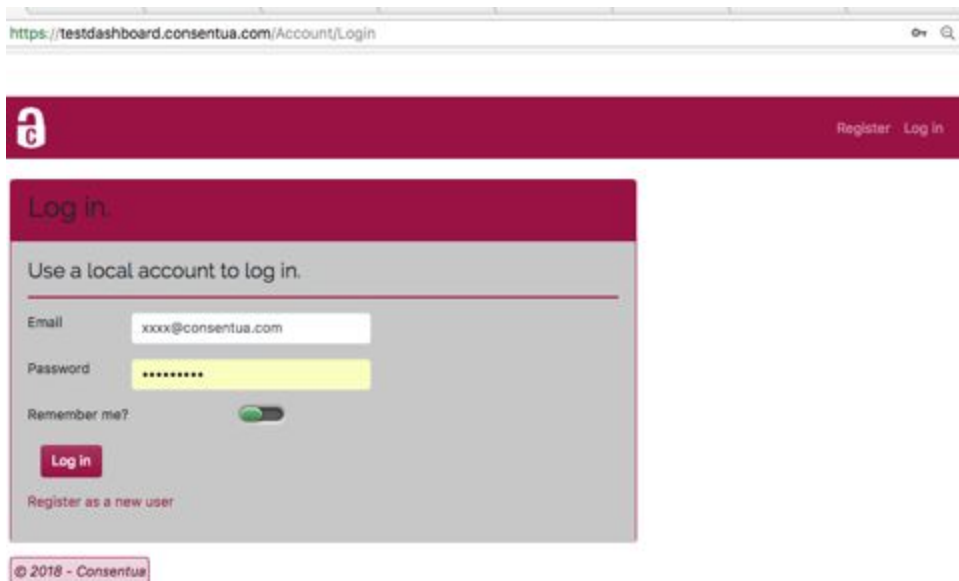
1. Create (or re-use) a Consent Template for your client consent service
2. Add additional admins if required
3. Add systems (as a user) to the Consentua Client Service
4. Add users and issue user apps with their token (in the code update that delivers Consentua).
5. Run queries against Consentua to find out who has consented to what, when.

## A word about Security

A security breach is not an issue. The user token can be revoked at any time. The service is encrypted end-to-end; plus the service does not store any personal data (other than an identifier). The hacker would only see a string of hashed data.

## Login

Once registered at login an Admin is presented with the following screen.



The screenshot shows a web browser window with the URL <https://testdashboard.consentua.com/Account/Login>. The page has a maroon header with the Consentua logo (a padlock with a 'c') on the left and 'Register' and 'Log in' links on the right. The main content area is titled 'Log in.' and contains the text 'Use a local account to log in.' Below this, there are input fields for 'Email' (containing 'xxxx@consentua.com') and 'Password' (masked with dots). A 'Remember me?' checkbox is checked. A maroon 'Log in' button is present, along with a link 'Register as a new user'. At the bottom left, there is a copyright notice '© 2018 - Consentua'.

## Setting up a new Consentua Client

The starting point is to create a new Consentua Client - this creates the unique client key. (the CID).

**NOTE: Only CONSENTUA SYSTEM ADMINS HAVE THIS PERMISSION**

Go to:

- <System View> <Clients>
- Go to the + button on the right hand side - to add a client.

The following is a description of the necessary information required when adding a new client.

**Note: this is a Consentua System Admin only task.**

**Name:** Is the name of this Clients Consent Project

**ClientName:** Is the name we know this client by.

**Data ControllerCompanyName:** Is legal trading name of the organisation. This may differ from its trading/common name.

**DataControllerAddress:** Is the registered address.

**DataControllerContact:** This could be the DPO, or the primary contact.

**DataControllerPhone:** is their phone number

**DataControllerPrivacyPolicy:** Is a link to the organisations privacy policy

**Trial** - Is this service a trial?

<https://testdashboard.consentua.com/Client/Add>

The screenshot shows the 'New Client' form in the Consentua dashboard. The form is titled 'New Client' and has a subtitle 'Create a new client.' Below the subtitle, there are several input fields for client information: 'Internal Name', 'Client Name', 'Data Controller Company Name', 'Data Controller Contact', 'Data Controller Phone', 'Data Controller Email', 'Data Controller Privacy Policy', and 'Data Controller Address'. There is also a toggle switch for 'Is Trial' and a date input field for 'Trial Expiry Date' with a placeholder 'dd/mm/yyyy'. At the bottom of the form is a red 'Add Client' button. The dashboard header shows the Consentua logo, 'System' and 'Admin' dropdown menus, and a breadcrumb trail 'Home / Clients / Add'.

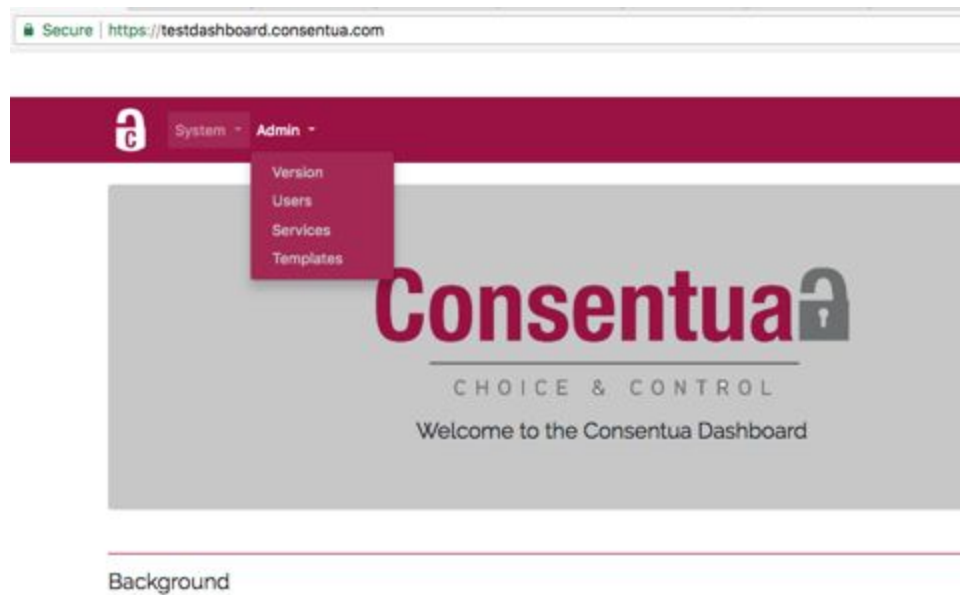
The new client will appear in the clients view.

The screenshot shows the 'Consentua Clients' view in the dashboard. The dashboard header includes the Consentua logo, 'System' and 'Admin' dropdown menus, and the text 'Acting As: KnowNow Information Ltd Hello coops'. The breadcrumb trail is 'Home / Clients'. The main heading is 'Consentua Clients'. Below the heading is a search bar with a placeholder 'Search...' and a magnifying glass icon. There is also a red '+' button. Below the search bar, there is a table of clients. The table has two rows: 'Consentua' and 'Test Client (M)'. Each row has a red edit icon (pencil) and a red delete icon (trash can). The 'Test Client (M)' row also has a red share icon (people) and a red status icon (square).

## Admin View

Post login the client service admin is presented with these options

*NB: Admins only see the admin toggle*



## Services View

Paper Cup demo

Service Id:105

Service Name: Paper Cup demo

Service Key: fa83fb53-1c0b-4ee0-b4bb-a5efe6fd4360

Service Client Id: 266

Service Jurisdiction: GB

Templates

Id: 63

Name: Cookie Consent

Public: True

Id: 98

Name: email marketing (e2e demo)

Public: True

Id: 100

Name: Consent for using your location now

Public: False

Id: 999999

Name: Right to be Forgotten

Public: True

## Linking Service to Template

Once a template has been created the next step is to link it to a service. Use the green button with the link symbol.

<https://testdashboard.consentua.com/Service/Template/25>

System

Admin

Hello coops

Home / Services / Add Template

Add Template To Service

Name	Question	Public	Language	Display Type	Options
Social Housing	Consent to use personal data to provide the best possible housing for your family	True	en	LINEAR	
Hospitality for pubs and clubs	Personal data used by ourselves and our partners	True	en	LINEAR	
HealthCare	Health & Social Care	True	en	Binary	
Hospitality #2	The different types of personal data that will be used by this organisation to deliver hospitality services	True	en	Binary	

Leads to the view left..

*Note 1: Public templates can be connected to a service.*

*Note 2: Private templates are top and can only be linked to your consent service.*

*Note 3: Only the author of a consent template can change that template*

## Template View

- Go to Clients -> Templates View
- Creating Consent Templates
  - For a client consent service to be of use there is a need to create the consent template. Consent templates can be private (exclusive to your client consent service) or public (open to all).
  - When setting up the template it is important to tie that template to a client consent service. A template can be used by multiple services.
  - Templates require consideration before being created. What the template is to be called, what data types and data purposes are going to be outlined. Is the template going to be binary or linear?
  - The input for the language of consent being requested needs to come from the business side of the organisation. A mix of marketing, legal, compliance, DPO, Operations, IT and customer
  - service will need to collaborate on the wording of consent. As all these stakeholders have an opinion on the personal data required by the organisation.
  - Consentua aims to simplify the ask to the end user/citizen/customer by linking a data type to a data purpose. This gives the end user/citizen/customer more 'choice and control'. This also allows the organisation to be more creative and flexible and personal in the service it can provide that end user/citizen/customer.

The screenshot shows the 'New Template' form in the Consentua dashboard. The form is titled 'New Template' and has a subtitle 'Create a new template.' Below this, there are several input fields and a toggle switch. The fields are: 'Name' (text input), 'Question' (text input), 'Explanation' (text input), 'Public' (toggle switch, currently on), 'ConsentType' (dropdown menu), 'DisplayType' (dropdown menu), and 'Language' (dropdown menu). Each field has a small yellow icon to its right. At the bottom left of the form is a red button labeled 'Add Template'.

## Completing the Consent Template

The Consent Template is where the data types (as in what type of personal data is required) and data purposes (how will that requested data be processed and used) are described. The language used here is all editable and can be changed at anytime by the Client Admin.

It is recommended that templates be created from a scenario/use case perspective, which means they are centred around the data purpose. For example, having a Consent Template focused on sharing personal data to allow for a bike hire scheme.

When completing the template a number of decisions need to be made. Such as:

- Jurisdiction this comes under
- Explicit or Implicit Consent being captured
- Language to use
- Linear or Binary.

Setting the SDK language. As part of the Beluga release the consent template can now determine the language used in the SDK for the static text - the 'Data Use and Data Purpose text' - see image below. Meaning that Consentua is fully multi-language compliant



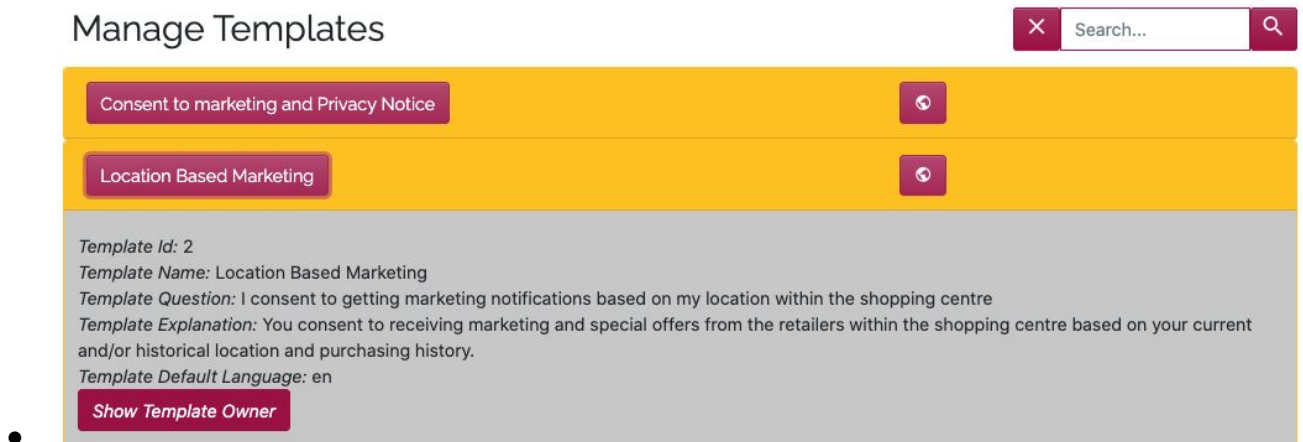
## Linear & Binary

A binary consent is the standard Yes or No view of sharing personal data.

A linear consent is a more graduated view of the consent. From a linear consent perspective the intention is as the position of the setting increases (0 to 5) then the data types required to fulfil the purpose expand in scope and use. Depending if a linear or binary consent interaction, break out how the different data types are then used to fulfil that purpose.

## The Template

Each template is given a unique ID. Found in the 'Templates' view. See below





To see a template in action go to the PaperCup Shop demo:

<http://cupshop.consentua.com/#/>

- Refresh Paper Cup demo - see change realised
  - NB: The reduced burden on the IT department -
    - Empowers purpose owner - the business process owner
    - Marketing - CISO - Risk all empowered.
    - No IT Department Involvement
- Look at the Purpose on the demo
  - **We will use your postcode and the first line of your address. - *Will change this later***
    - NB: All editable fields
    - NB: *Gartner positive* - a matrix of purposes across services

Consent for using your location now



Template Id: 100

Template Name: Consent for using your location now


Template Question: Permission to use your location information later

Template Explanation: We will give your postcode and your email address to the cup recycling company for the purpose of collecting old cups.


Template Default Language: en


Template Owner Id: 266

Purpose Groups



**Id: 174**   Name: Location   Language:EN   Purpose Count: 1







Purpose Id: 326



Data Use: your postcode and first line of your address.

Data Purpose: collecting old and new cups from your address so they can be recycled.

Language: en



Cup Shop - Cookies



Note 1: Mix & match services with common templates

Note 2: Re-use common templates - enforce a corporate standard











Note 3: Multilingual -

Note4: The styling of the consent interaction on the page is down to own branding

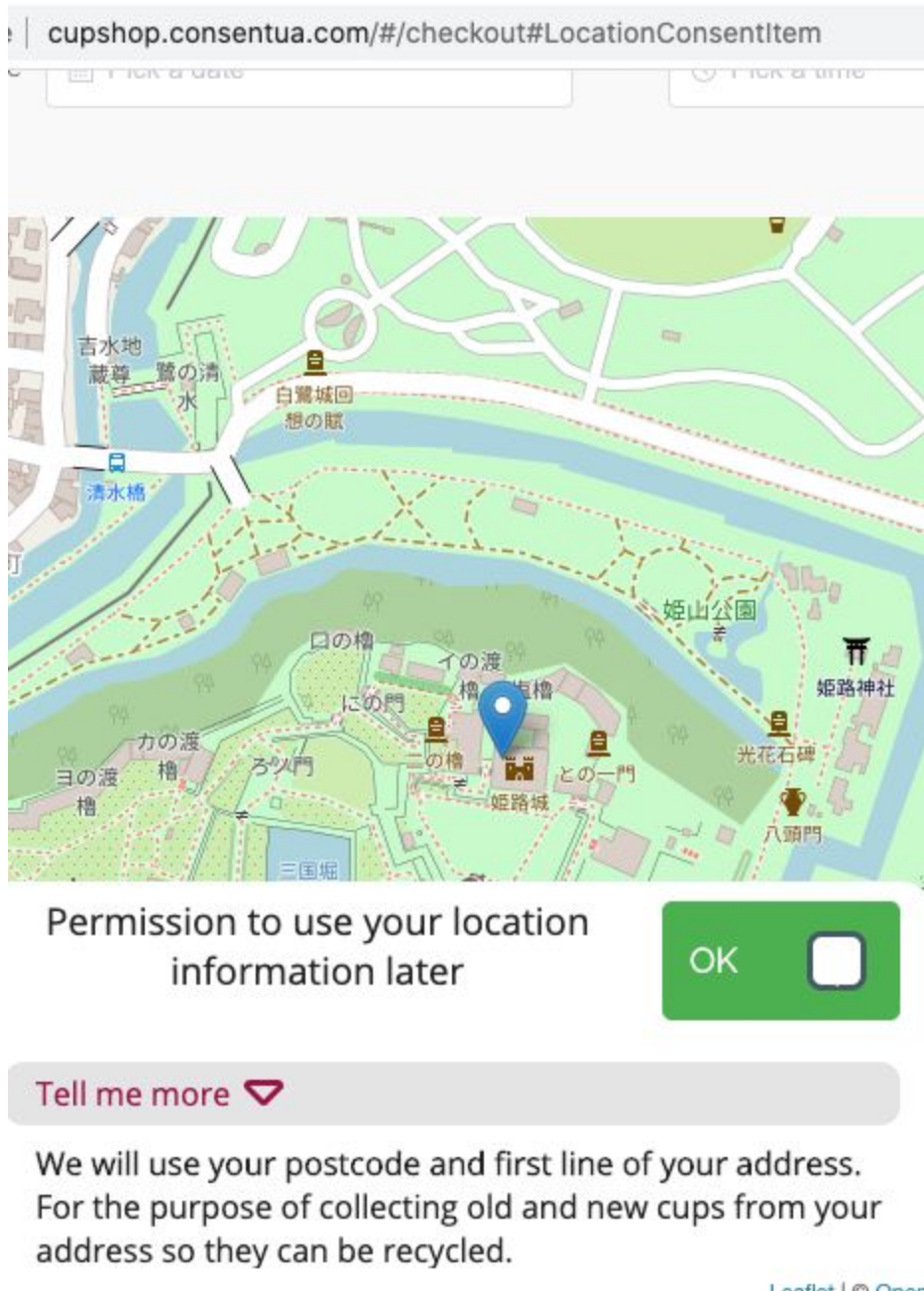
## Edit a Template

- All fields are editable
- Can use the “we will use” & “For the purpose of” text in the SDK
- Some choices are available:
  - Public or Private
  - Interaction Type
    - Binary or Linear
  - Language
    - English is default
    - Inherits browser setting - as long as the translation is stored in the language table (*This currently needs developer support to deploy direct into the database table*).
  - Web Hook URI - so can be notifiable
- Now edit the Question. Then refresh the Cup Shop Demo - see that change.
  - <http://cupshop.consentua.com/#/checkout#LocationConsentItem>

## Edit an existing template.

Name	<input type="text" value="Consent for using your location no"/>	
Question	<input type="text" value="Permission to use your location information later"/>	
Explanation	<input type="text" value="We will give your postcode and your email address to the cup"/>	
Data Use Text	<input type="text" value="We will use"/>	
Data Purpose Text	<input type="text" value="For the purpose of"/>	
Public	<input checked="" type="checkbox"/>	
Interaction Type	<input type="text" value="Binary"/>	
Language	<input type="text" value="English"/>	
Notifiable	<input checked="" type="checkbox"/>	
Web Hook URI	<input type="text"/>	

Save



- *NB: Demonstration of the admin's control over the purpose shown to citizens/customers.*
- *No IT Department update required.*
  - Reduces Risk
  - Reduces Cost
  - Speeds up responsiveness to market and customer demands

## Purpose Groups

- Purpose groups are a collection of purposes
- Can be used for linear consent - i.e. where purposes graduate depending on the request for personal data - less to more.
- Can have any number of purposes in a purpose group
- Purpose Group has a unique identifier

### Edit Purpose Group

Edit an existing purpose group for a template.

Description	<input type="text" value="Location"/>
Explanation	<input type="text" value="Collecting old cups"/>
Language	<input type="text" value="en"/>

[Edit Group](#)

## Purposes

- Sit under a purpose group
- Description of the purpose being proposed
- Has a unique Identifier

### Edit Purpose

Edit an existing purpose.

DataPurpose	<input type="text" value="collecting old and new cups from y"/>	<input type="button" value="•"/>
DataUse	<input type="text" value="your postcode and the first line of your address."/>	<input type="button" value="•"/>
Category	<input type="text" value="Contact"/>	<input type="button" value="•"/>
TerminationURI	<input type="text"/>	<input type="button" value="•"/>
Language	<input type="text" value="en"/>	<input type="button" value="•"/>
IsSensitive	<input checked="" type="checkbox"/>	<input type="button" value="•"/>
SensitiveCategory	<input type="text" value="Contact"/>	<input type="button" value="•"/>
ThirdPartyDisclosure	<input checked="" type="checkbox"/>	<input type="button" value="•"/>
ThirdPartyName	<input type="text"/>	<input type="button" value="•"/>

## Notes about some the fields


- Termination URI - for Consent Receipt Interoperability
- Category & Sensitive Category is a drop-down list - Consent Receipt required
- Third-Party Names - is from the Privacy Policy - helps with notifiable purposes
- Language - can support multiple languages via a language table in the Database
  - Inherits the browser Lang identifier - default is English
  - *Another Gartner like*


## Reports View

- Can report on:
  - User
  - Purpose
  - Service

## Reporting

### Service Login Report

 Download Report (CSV)

 Download Report (JSON)

### User Consent Search

Service Id

105

User Identifier

ef529ce7-524d-46de-b87d-e8b56c9c51f6

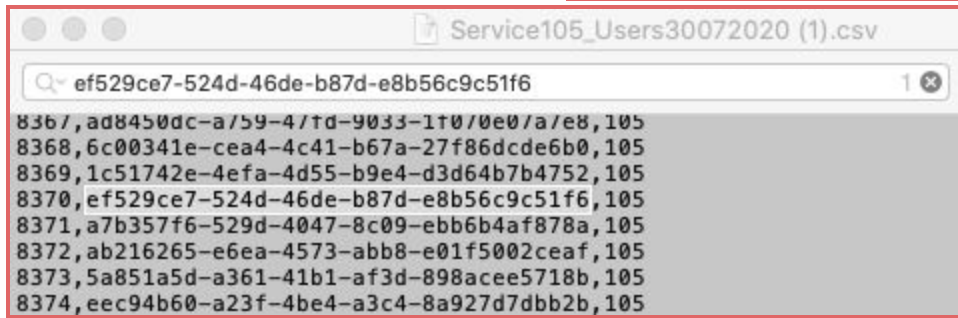
Download Consents

Reporting against: User ID: ef529ce7-524d-46de-b87d-e8b56c9c51f6  
Service ID: 105 - Paper Cup Shop Demo



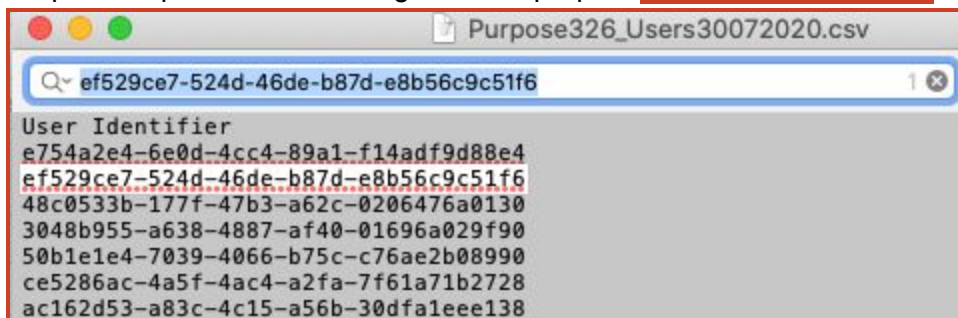
Three output reports are shown below for the above user ID on Service 105 (Paper Cup Shop Demo)

Report on list of users accessed a service - *the unique Consentua User ID - 8370*



```
ef529ce7-524d-46de-b87d-e8b56c9c51f6
8367,ad8450dc-a759-47fd-9033-1f070e07a7e8,105
8368,6c00341e-cea4-4c41-b67a-27f86dcde6b0,105
8369,1c51742e-4efa-4d55-b9e4-d3d64b7b4752,105
8370,ef529ce7-524d-46de-b87d-e8b56c9c51f6,105
8371,a7b357f6-529d-4047-8c09-ebb6b4af878a,105
8372,ab216265-e6ea-4573-abb8-e01f5002ceaf,105
8373,5a851a5d-a361-41b1-af3d-898acee5718b,105
8374,eec94b60-a23f-4be4-a3c4-8a927d7dbb2b,105
```


Purpose Report on who has agreed to a purpose - *identifies the user ID*



```
Purpose326_Users30072020.csv
ef529ce7-524d-46de-b87d-e8b56c9c51f6
User Identifier
e754a2e4-6e0d-4cc4-89a1-f14adf9d88e4
ef529ce7-524d-46de-b87d-e8b56c9c51f6
48c0533b-177f-47b3-a62c-0206476a0130
3048b955-a638-4887-af40-01696a029f90
50b1e1e4-7039-4066-b75c-c76ae2b08990
ce5286ac-4a5f-4ac4-a2fa-7f61a71b2728
ac162d53-a83c-4c15-a56b-30dfa1eee138
```

The report showing the purpose ID 326 on Service 105 that User 8370 has consented too

- NB: The Template ID (100)
- Returns a string
- Consent Receipt compliant



```
User8370_Consents30072020.json
{"Success":true,"Message":"OK","Consent":{"ClientId":266,"ServiceId":105,"UserId":8370,"Purposes":
[{"ConsentTemplateId":100,"ConsentTemplateVersion":7,"PurposeId":326,"PurposeVersion":3,"AuthenticationData":{"_ix":"https://kni-
test-node.herokuapp.com/custom-interaction.html","_ua":"Mozilla/5.0 (Windows NT 10.0; WOW64) AppleWebKit/537.36 (KHTML, like Gecko)
Chrome/72.0.3606.0 Safari/537.36","_lang":"en","_url":"https://websdk.consentua.com/svc/
#s=105&c=576&t=100&lang=en&ix=https%3A%2F%2Fkni-test-node.herokuapp.com%2Fcustom-interaction.html"},"Consent":true}}}
```

The reports are available direct via the API.

- Enables programmatic interaction with Consentua
- Use with Web Hooks and integration with downstream systems - as consent changes other systems are notified.

## Consentua for Developers

<https://consentua.com/developers.html>

## The Consentua API

<https://api.consentua.com/swagger/ui/index>

## The Consentua SDK

<https://websdk.consentua.com/>

## CodePen for Consentua

A series of different user interaction demo's for Consentua

<https://codepen.io/consentua>

## Consentua GitHub

<https://github.com/Consentua>

### Enquiries:

[contact@consentua.com](mailto:contact@consentua.com)

November 2020

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