QBank Consent Process

User Guide

Change History

Version	Issue date	Prepared by	Description
1.0	Dec 2022	Arturas Zelenkauskas	Initial release
1.1	Jan 2023	Fredrik Berglund	Added images
1.2	Dec 2023	Arturas Zelenkauskas	Added Legal term filter Added Settings menu Added person image upload
2.0	May 2024	Arturas Zelenkauskas	Updated images Updated Overview page with search and sort functionality Updated Legal terms page with new checkbox text, language selection and duplication Updated sending media consent with warning message Added Document consent Updated Settings page with new settings for branding of landing page Updated Filtering page with new filters on consent status

Using the Consent

Administration page

As a consent administrator you can go to Administration -> Consent where you will find main administrative sections of the consent.

Overview

General information from a **media** perspective is provided in the overview section. Easily access the quick statistics on the top of the page or get a deeper view on each consent record for the media at the bottom part of the page.

You can resend, remove or withdraw a consent for media in this page.

For more convenience it is possible to perform a quick search for a consent by Media ID or person either sort on one of the column headers.

People

These identities are required to represent the basic details about a person that can then be connected to one or many different types of consent records.

All the activities, including person updating, in regards to consent, possibility to [send the upload consent]() and all upload consents for each person could be found in this page.

There are 3 ways to create new consent person for the consent:

1. In consent admin page people section click the link "Add new", fill in person details (**Name***, **Email***, **Phone** and **Image**) and click the button "Create".

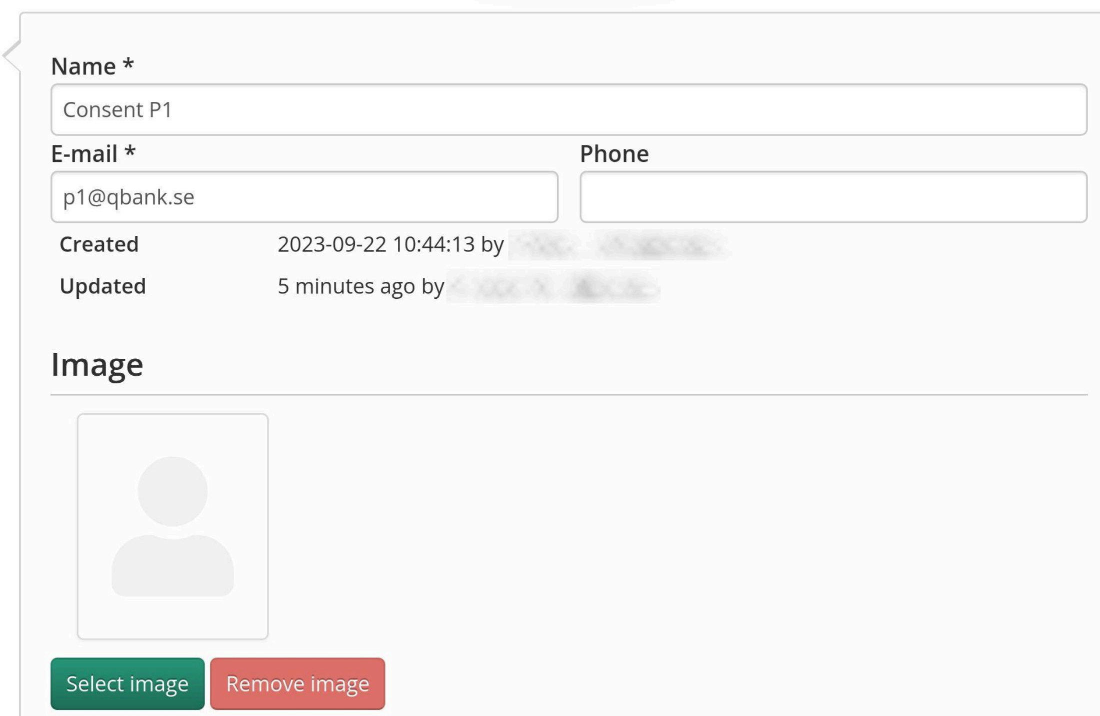
2. Import existing QBank users as a consent person. Go to Admin -> Accounts -> Users and select the user you want to import. Click the button "Create consent person" (*Note: Currently there is no possibility for multiple user imports at once*).

3. Send the upload consent using [QR code link functionality]().

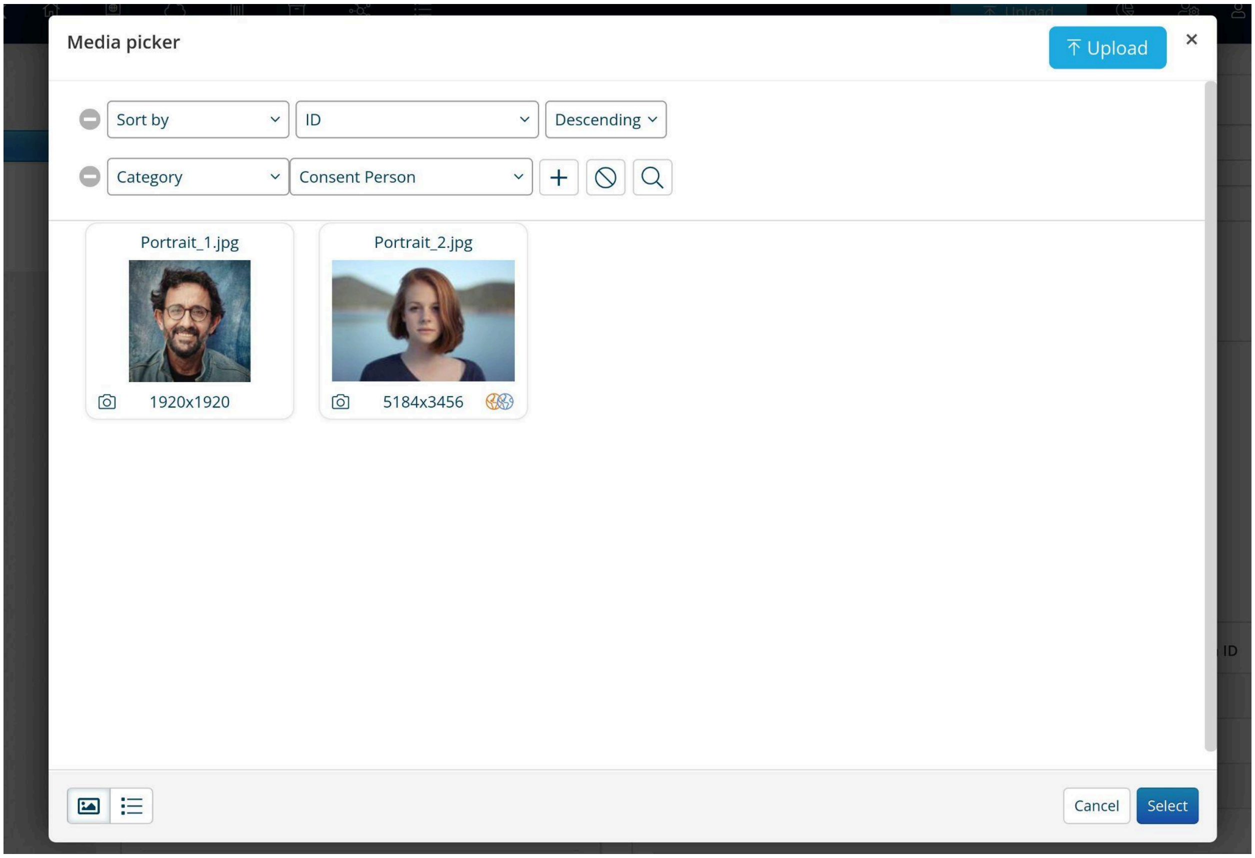
All active persons will appear in a list when [tagging]().

Adding an Image

To improve recognition ease, it is possible to associate an image with a person.



Click on the "Select Image" button to open a media picker window with a [pre-defined category](#) filter, streamlining the image selection process. Choose an image from the pre-defined category, switch to another category, or upload a new image directly from the media picker window.
This process mirrors a regular image upload in QBank, providing flexibility and ease of use and feel. Simply click on the "Upload" button in the media picker window, choose an image from your computer, fill all needed properties, and the selected image will automatically be set as the person's image. Save the changes to take effect.



If you need to remove a person's image, click on the “Remove Image” button and save the changes.

Legal Terms

Legal terms are connected to each consent created in QBank. You can create any amount of legal term templates to fit various consent requirements. When a person gives consent, the terms consented to are stamped onto the consent record and cannot be changed later.

There is one standard legal term which is created by default, but you can create as many legal terms as needed by clicking “Add new” and filling in the information:

- **Title*** *(Name of the legal terms template. Title must be unique)*
- **Terms*** *(Legal terms information text)*
- **Checkbox text*** *(Legal terms consent checkbox text)*
- **Default expire date (years)*** *(Legal term expire date period from the time consent is signed. Default term on creation is 1 year)*
- **Is default terms** *(If checked, particular legal terms becomes a default selection upon consent request)*
- **Language*** *(Selected language determines the language used in the consent landing page and email template. Currently supported languages are English and Swedish.*
  Note: for a custom message you need to configure email template per language in E-mail admin settings)

After creating a legal term you will have a possibility to generate QR code linsk for it.

Note: In order to update the terms text or max grants you should use the button “Update QR code”. Rest of the fields are updated using the “Save changes” button.

Duplicate legal terms

For a faster creation of similar legal terms it is possible to duplicate the existing legal terms by clicking on the “Duplicate” button. New legal terms will be created containing the same information as the source.

Settings

In this section it is possible to manage various Consent settings. Quick overview of it described below.

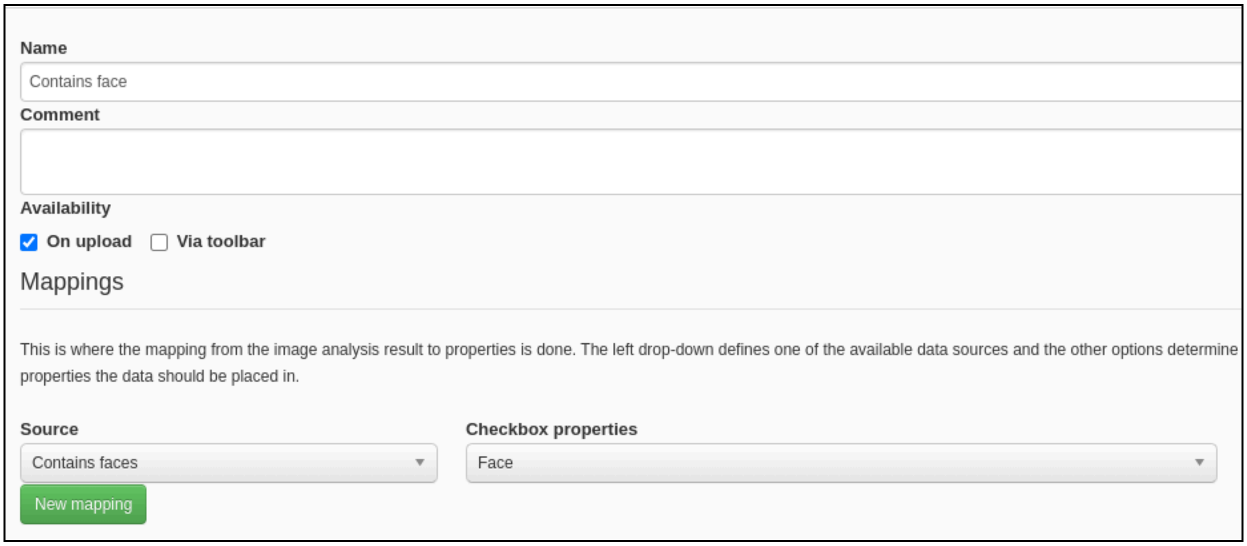
Setting	Description
(Persons) Image category	predefined QBank category which will be used to search for an image when adding an image for a consent person in a People section
(Consent) Consent document category	predefined QBank category which will be used to search for a file when adding already signed consent for a consent person in a People section
(Landing page settings) Logotype	Select or upload which logo should be shown in consent landing page and email templates
(Landing page settings) Background/Button/Agreement background color	Select which page background/button/agreement background color should be used in consent landing page and email templates

Tagging

Automatic face boundary box

In order to set up an automatic face boundary box adding process on media upload, if an image contains faces, additional image analysis should be configured. To do this:

1. Go Administration -> Data Mapping -> Image Analysis
2. Create new record for this process



Note: Service is provided by Google Vision functionality which is paid service.

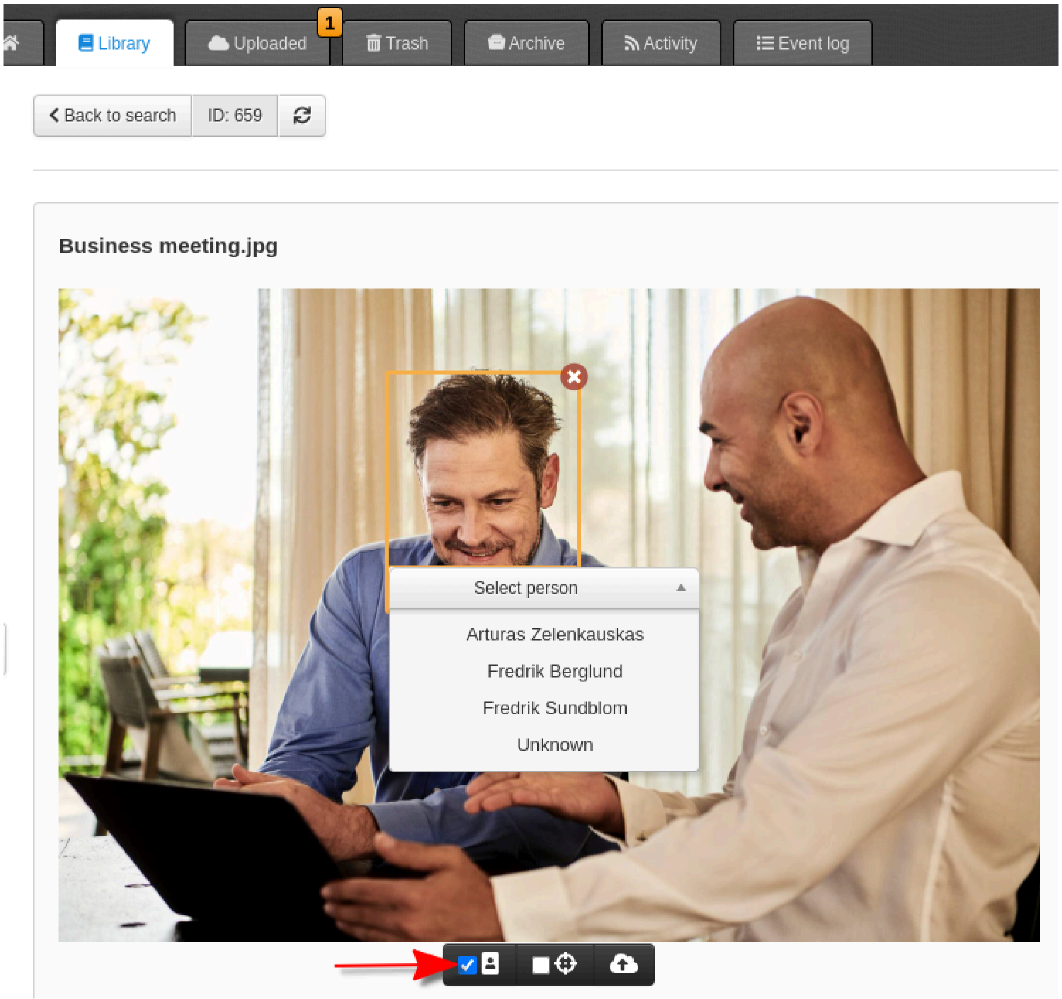
Manual face boundary box

If you do not use automatic face tagging, it is possible to do this manually.

1. Go to media detail view
2. Ensure face boundaries toggle is on
3. Click and drag a mouse to create custom face boundary box

Tag a person

Once the face boundary box is applied (manually or automatically) you can tag a person on the respective face. You can add/remove as many face boundaries as needed.
To tag the person click on the boundary and select the person from the list. You can use the 'Unknown' tag as a helper in the tagging process which would be useful in the filtering process.



Untag a person

When a person is tagged it is easy to do the opposite and untag. Click on the person dropdown list in the face boundary box and select “Remove person”.
If there is a pending consent request for the person which you untag, it will be automatically removed. Same happens to that media in the recipient's approval page.

Request a consent

Media consent

Media consent is requested for existing media which is already uploaded into QBank.

Send media consent

To send a media consent request:

1. Select one or multiple approved media(s) from the Library *(Note: You can choose max 50 media in one batch for this type of consent request. If you need more, we recommend using Upload consent request instead).*
2. Click the button from the top toolbar menu OR right click the mouse button and select “Consent request for media” from the dropdown menu.
3. Fill in the remaining information in the request pop up window.

   - **Recipients*** *(emails are automatically fetched from tagged person, you can also add email address manually)*
   - **Legal terms*** *(Select which legal terms should be used for the media consent request)*
   - **Media(s)*** *(Review attached media to request)*
   - **Expire date*** *(Select date when consent expires from request date)*
   - **Select request type*** *(Currently QBank supports only email)*

4. Click the “Send request” button

Important: If there is a mix of tagged/untagged media and more than one recipient, confirmation pop up will be shown including untagged media to ensure that consent is being sent to the correct person. If confirmed, all untagged assets will be sent to all included recipients. Otherwise it will be possible to edit current media consent request.

Upload consent

You should use Upload consent in cases when media is not uploaded yet into the QBank or you want to get generic consent based on the number how many medias can be uploaded for a particular person.

Request upload consent for QBank users

Steps to request upload consent are:

1. Go to Administration -> Consent -> People
2. Select the person you want to send Upload consent to *(It is possible to send upload consent to one person at a time).*
3. Click the "Create consent" button and in the "Digital" tab fill in the remaining information.

    - **Recipients*** *(Recipient email is automatically fetched and not editable)*
    - **Legal terms*** *(Select which legal terms should be used for the upload consent request)*
    - **Expire date*** *(Select date when consent expires from request date)*
    - **Max grants*** *(Number for how many medias this consent could be applied to. Default is 50)*
    - **Select request type*** *(Currently QBank supports only email)*

4. Click the "Send request" button

Request upload consent for non-QBank users with QR code link

In specific cases when you do not know in advance the person you will need to have a consent from and most likely it is not an internal QBank user there is a possibility to create a new consent person while getting upload consent at the same time.

To get this upload consent and create new user, proceed with below steps:

1. Go to Administration -> Consent -> Legal terms
2. Select Legal terms for upload consent
3. Click "Generate QR code" button
4. Send generated QR code link for external user

When an external user opens the link, it is possible to scan QR code or click the link to get the upload consent.

External users should fill the mandatory name, email address fields and select the checkbox to consent. After submission consent person is created and upload consent is available under the person information in QBank.

Document consent

You should use Document consent in cases when you have already signed consent on paper and want it to be used in QBank.

Steps to create document consent:

1. Go to Administration -> Consent -> People
2. Select the person you want create Document consent for
3. Click the “Create consent” button and in the “Document” tab fill in the remaining information.

    - **Recipients*** *(Recipient email is automatically fetched and not editable)*
    - **Legal terms*** *(Select which legal terms should be used for the document consent request)*
    - **Expire date*** *(Select date when consent expires from request date)*
    - **Max grants*** *(Number for how many medias this consent could be applied to. Default is 50)*
    - **Select request type*** *(Currently QBank supports only email)*

4. Click the “Create” button

Document consent is automatically granted after creation.

Apply upload or document consent

If you have approved upload consent, you can directly apply it on uploaded media for the person who consented. Document consents are approved automatically after creation.
There two ways to apply consent:

1. When you tag the person on a media and upload/document consent(s) are available, it will automatically ask you to select which upload/document consent you would like to apply.

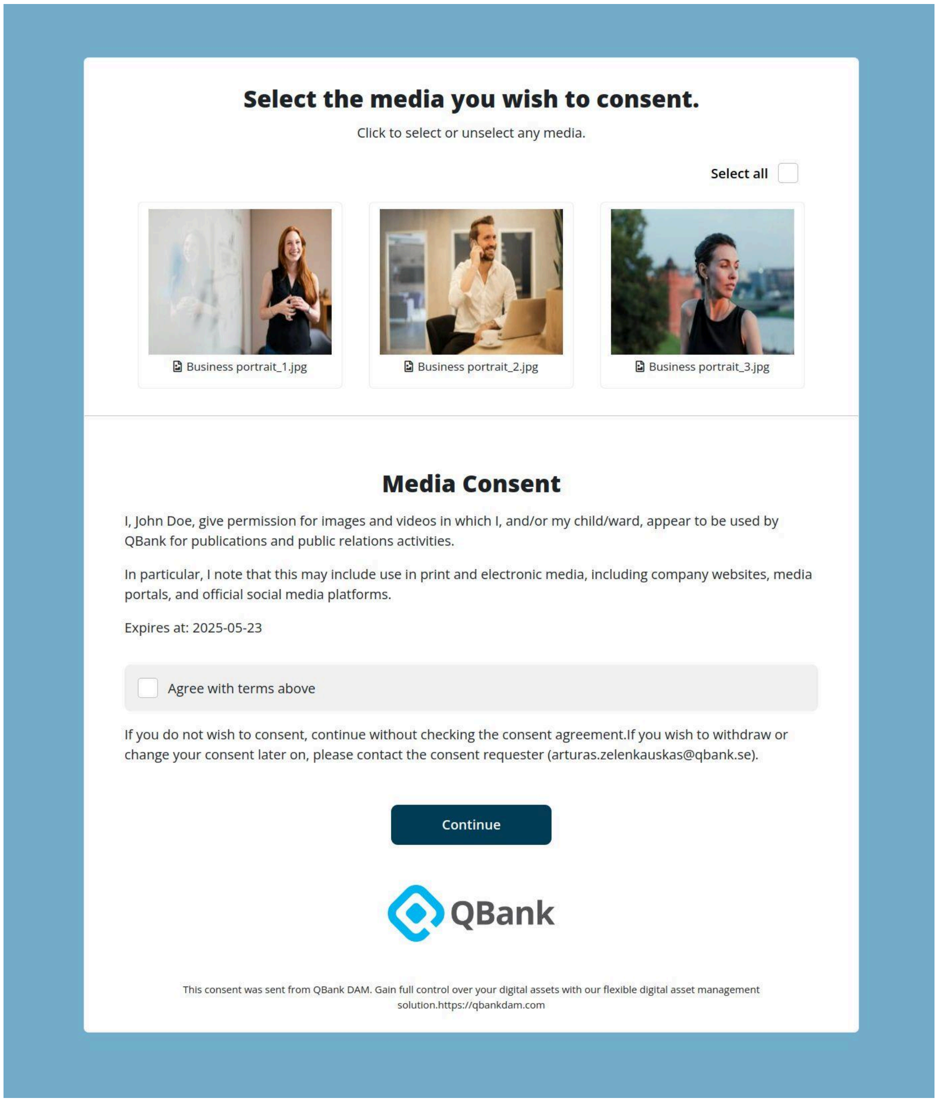
2. When you select media in the Library and click the button “Apply consent” in the top toolbar menu. Choose the upload/document consent and click “Apply”.

Consent approval page

In the consent approval page consent person (recipient) can take an action on the request.

Media consent approval

In a media consent request, the recipient sees the page with all media where it is up to the person to decide which media to include in the approval by reviewing and selecting it.



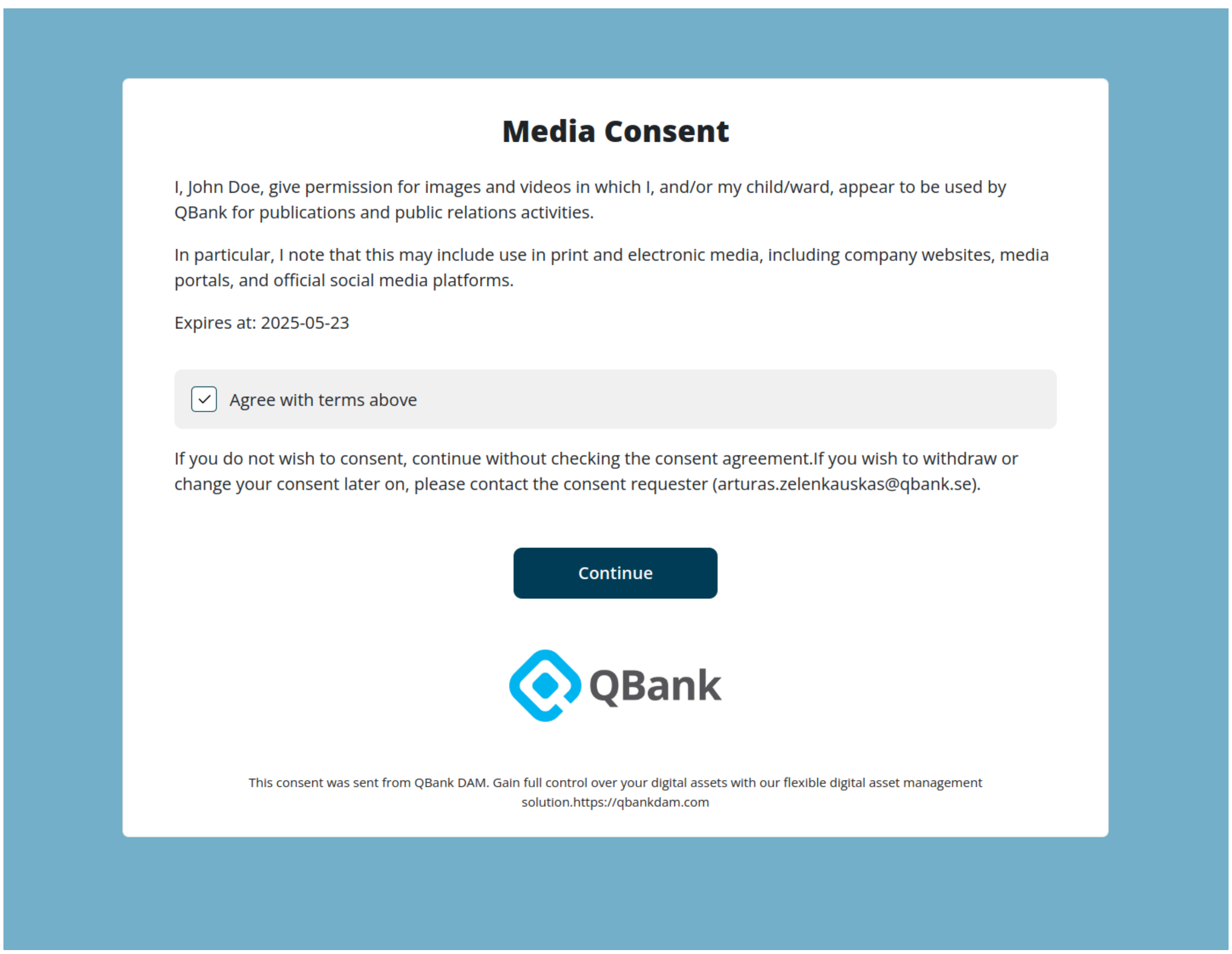
For easy selection of all media, a “Select all” checkbox could be used.

After adding media in selection, reading legal terms and checking the consent agreement box click the “Submit” button.

Note 1: only media which are checked with “Include in consent” will be approved, having in mind Note 2 is fulfilled.
Note 2: leaving terms for consent checkbox unchecked will result a rejection of a whole consent request

Upload consent approval

In an upload consent request, the recipient sees the page with legal terms and when consent expires. To approve the checkbox of agreement must be checked, otherwise consent will be set as rejected.



Resend a consent

When the media or upload consent request is sent out it status is set to *pending* until it is approved or rejected. While a consent request is in pending state it is possible to resend the consent (i.e. if the recipient did not get an email). To do that:

1. Go to Administration -> Consent -> Overview
2. Find the media for which you want the consent to resend.
3. Click “Resend” button

This action will replicate initially sent consent gathering information about recipient, legal terms, media and expiration date. If you change the original consent record and resend it the previously sent one will become invalid.

Remove a consent

When the media or upload consent request is sent out it status is set to *pending* until it is approved or rejected. While a consent request is in pending state it is possible to remove the consent (i.e. if you sent a consent request to the wrong person). To do that:

1. Go to Administration -> Consent -> Overview
2. Find the media ID which you want to remove consent request
3. Click “Remove” button

This action will also remove consent status information in a detailed media view.

Withdraw a consent

When the media or upload consent request is accepted it status is set to *granted*. While a consent request is in a granted state it is possible to withdraw the consent. To do that:

1. Go to Administration -> Consent -> Overview
2. Find the media for which you want the consent to withdraw.
3. Click “Withdraw” button

4. Enter the reason of withdraw and confirm

This action will turn the status of consent record to *rejected*.

Filtering

For a better search ability related to the consent process you can use standard filter functionality in QBank library. By default, below filter categories are available with the descriptions for the consent:

Name	Operator	Value	Description
Consent status	Is	Approved Rejected Pending	Showing media that has a consent with one of the selected statuses
	Is not	Approved Rejected Pending	Showing media that has consent with any other status than the one selected
	Has a value		Showing media that have tagged persons (selected or not selected consent person) and is either in status Approved, Rejected or Pending
	Has no value		Showing media that have tagged persons (selected or not selected consent person) and is not in status Approved, Rejected or Pending. The

			media has not been sent for consent yet but one or multiple persons are tagged.
Consent person		Input field for consent person search	Showing media of a specific consent person
Consent expire date	Before After Is	Date	Showing media that have consent and its expire date is before/after/equal to date set
Consent legal term		Legal term selection	Showing media that have a specific legal term selected in dropdown field

Tip: when searching it is very convenient to save a search into separate search folders. It will help to reuse the same filtering and get the results faster.