



# Universal Consent Platform Configuring Consent Support in GTM



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## Overview

Google Tag Manager (GTM) is a popular tag management platform which allows you to centrally manage advertising vendors and how they are deployed to your web sites and mobile devices. Evidon Universal Consent Platform (UCP) supports GTM. This document describes how to deploy the UCP scripts through GTM as well as how to implement consent mechanisms to comply with various regulations such as the GDPR.

The Evidon UCP supports consent at various levels: broad, or complete, category-level, or vendor-level. If you offer just the consent choice of yes or no from your customers, you can hook our general consent event to be notified that advertisers are allowed. If you support users consent at the level of category groupings (Advertisers, for example) you can pull that information from our consent event and enable the appropriate tags. Or you can offer specific vendor support, allowing customers to consent to specific vendors. That is supported as well.

This document assumes you already have a working knowledge of both the UCP and GTM as we will not go into details on [how to configure your UCP implementation](#) or GTM basics. Instead this will focus on how to deploy the UCP through GTM and how to support the various levels of consent support.

## Terms

The following are some definitions for terms used in this document.

**Prior Consent:** The act of gaining consent from users before allowing advertising or tracking technologies to execute.

**Tags:** The mechanisms used by advertising and tracking companies. Typically, these are JavaScript files but can also be things like image drops.

**Vendors:** Another name for companies who perform advertising and tracking functionality.

**Consent Wall:** A way to describe the “barrier” put in place to hold tags which require consent from executing until consent is gained.



## Enabling Evidon Category/Vendor Consent Support

While we are not going to walk you through set up on the UCP platform, we do need to take a minute to show you how to enable support for Category and Vendor consent. The support for Category/Vendor consent is relatively new to the UCP and you may not have enabled it yet.

Support for the more granular consent is enabled at the Theme level of your consent platform. These instructions will walk you through the process of enabling this support in a theme.

### 1. Log into the Evidon Privacy Application

Open your favorite browser and go to <https://privacy.evidon.com>

### 2. Open your "Manage" section to show the list of notices

This is a little shortcut to find the theme you want to modify (assuming you have multiple themes). Filter the list of notices by typing in the domain name where you want the granular consent to occur. Next to the notice domain you will see the theme assigned to the notice. Click on that name to open the theme in a new tab/window.

### 3. Enable Options Dialog v2

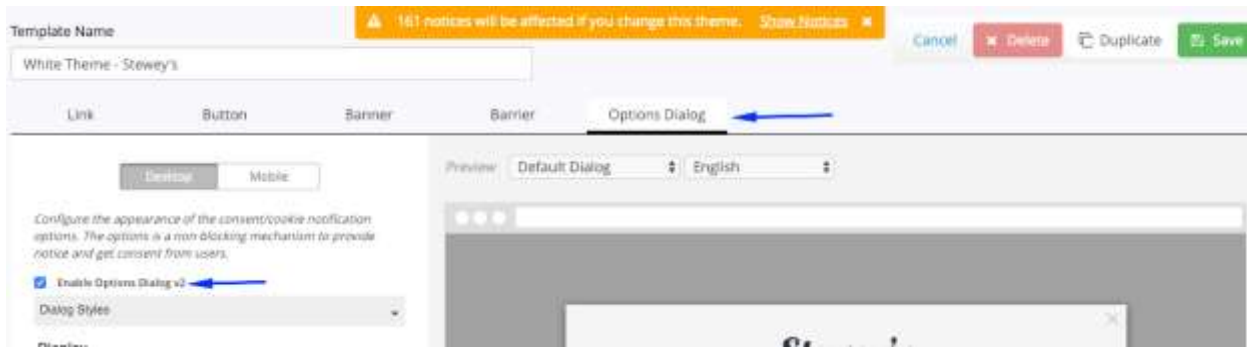
Once you get into the target theme, switch to the Options Dialog section. In that section you will see an option to enable v2 of the options dialog. To enable the granular consent, check this option and save the theme.

A few things to note:

1. Enabling this will enable this for all notices using this theme. If you don't want that to happen you should copy the theme, modify it, and assign the new theme to the web properties where you are going to do granular consent.
2. This will change the layout of your options dialog. The most obvious change will be several toggle controls that allow the granular consent selections to users. You will need to test this and make sure the default styles on the page are behaving correctly.
3. If you are not sure which theme to change you can go into the list of notices, filter the list down to the desired property, and then click the name of the theme next to the property. This will open the theme designer in a new window.

Once you have enabled the new version of the dialog, you will want to verify the styles look the way you want.

This is a picture showing the correct option to enable



## Configuring GTM for Consent

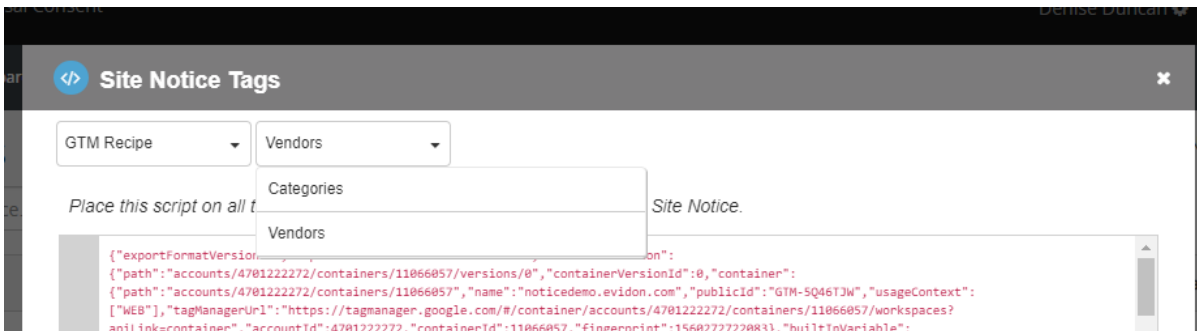
There are two ways to set up GTM for consent

1. For ease of implementation, use the Google Recipes, which can be downloaded from UCP and imported to GTM to configure variables, triggers rules and tags. Once they are imported, you must only assign the correct load rules to the tags.
2. For the most control over your configuration, use the events and script properties from the Evidon UCP tag to set up full consent support through GTM. But it will take some work to set it up correctly. Below is a walkthrough of one possible way to configure this support.

### Using Google Recipes

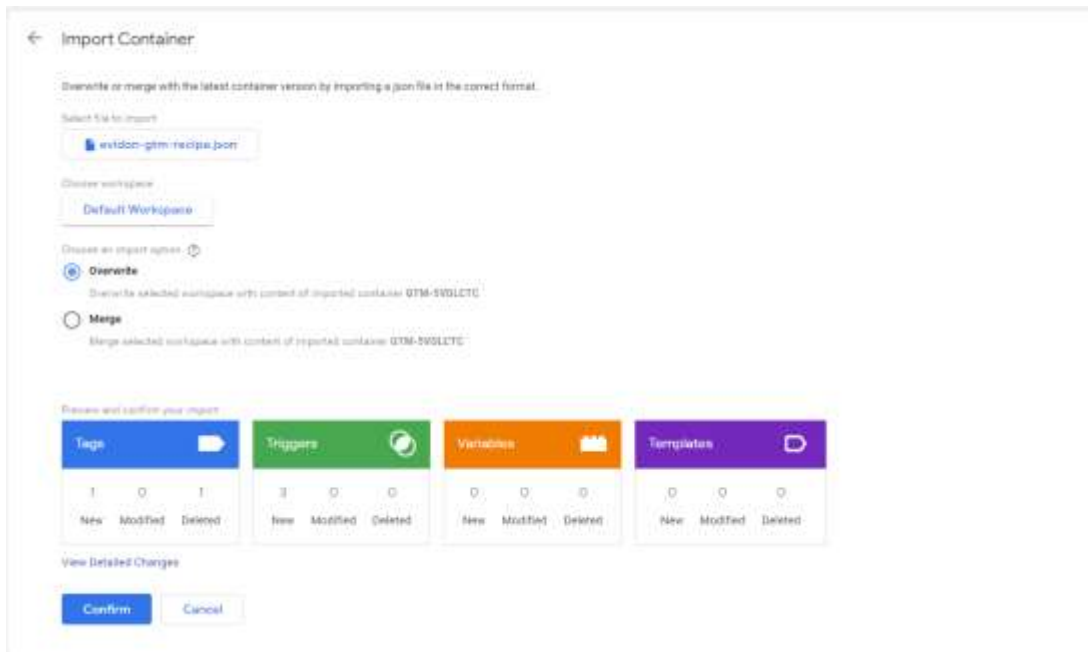
When logged in to UCP:

1. Click on the Manage link in the menu
2. Click on Get Notice Tag
3. On the modal click the drop down to GTM Recipes
4. Click the drop down to choose the level of consent: Vendor or Categories
5. Download the file, which will be in json format.



Once the file is downloaded, log into your GTM instance. Follow these steps to import the json file

1. Select Admin from the top menu links
2. Select Import Container. Here you will import the json file as the container file
  - a. You can overwrite the workspace or merge contents of the new file. Overwriting will replace anything existing with the new data from our file. Merge will bring in any new data and combine them with what's already been done.
3. Confirm



Once complete, your triggers are set up. The final step is to assign the correct load rules to the tags.

To support category consent on your tags you need to set up the tags to have the correct type of category consent assigned to them.

1. Open or Create the Tag you are adding to the consent wall.
2. In the Triggers section assign the All Categories trigger you imported and the appropriate Category Consent trigger for that tag.
3. Save the Tag settings

To support vendor consent on your tags you need to set up the tags to have the correct vendor consent trigger assigned to them.

1. Open or Create the Tag you are adding to the consent wall.
2. In the Triggers section assign the All Vendors trigger
3. Assign the specific Vendor trigger for the tag
4. Save the Tag settings

Remember, triggers on a tag act as an “OR” condition, so if either of them execute the tag will fire.

Once you have set up the tag and saved it, it should look something like the following:

CURRENT WORKSPACE

Default Workspace >

Search

- Overview
- Tags**
- Triggers
- Variables
- Folders

### Tags

Search New

Name ↑	Type	Firing Triggers	Last Edited
AdRoll Tag	Custom HTML	<ul style="list-style-type: none"><li>AdRoll Consented Trigger</li><li>All Vendors Consented Trigger</li></ul>	a few seconds ago
Evidon Consent Tag	Custom HTML	<ul style="list-style-type: none"><li>All Pages</li></ul>	3 minutes ago





## Using Events and Scripts Properties

### *Prerequisites*

For more control over the creation of triggers rules, you can follow these steps instead of the recipe. Before you begin setting up consent support you need to have the following:

- A list of vendors that need to be behind the consent wall vs the essential vendors that do not need consent.
- A decision on the level of granularity you are going to support (category, vendor, or just blanket yes/no consent)
- A working knowledge of how to configure GTM
- Your list of Vendor Categories as configured in the Evidon Privacy application

You also need to be prepared for this to take some time and effort. The odds are you have not been configuring your GTM implementation with consent in mind and this may require a substantial amount of re-work. It is entirely possible you will need to re-work your entire GTM setup. This is unfortunate, but it is a sign of the times we are living in now. Trust us, you are not alone with this pain.

### *Technical Overview*

This section describes how we communicate consent through the GTM data layer. If you are a GTM guru this is likely all the information you would need to set up your tags and triggers. Even if you aren't, it is important to know how we communicate consent to the tag manager.

### *Data Layer Call Details*

```
dataLayer.push('evidonConsentGiven', consentCategories:'', consentVendors:');
```

- *eventName: evidonConsentGiven*
- *consentCategories: comma-separated list of category names*
- *consentVendors: comma-separated list of vendor names*

The category names in the `consentCategories` are the names you have assigned to your Category Buckets in the privacy application where you configured those. If all categories are enabled the only value in the string will be 'all'.

The vendor names in the `consentVendors` are the permanent string identifiers we use for our vendors. If all vendors are enabled the string will be 'all'.



## *GTM Nuances*

If you haven't set up sophisticated tag rules before there are a couple of things to be aware of.

On Triggers you can set up multiple "fire" rules that behave together, so they all need to be true for the trigger to fire. We refer to this as "AND" logic, because each condition needs to be met.

On tags you can set up multiple triggers, but these behave as "OR" conditions. In other words, if any trigger is met the tag will execute.

What does this mean to you? You need to be careful about the triggers assigned to the tags that need to be behind a consent wall. For example, you cannot put on the Page Load trigger for any of them because that will always be true, and the tag will drop before consent is received.

Our recommendation is for you to create Tag-specific triggers for all tags that need consent. This may seem like a lot of work, but if you are doing vendor-level support it is unavoidable and even if you aren't it is probably good practice. But tag-specific triggers will allow you to put on multiple trigger conditions such as consent, and a button click or form submission. It will also allow you to more easily transition into vendor-level consent support if you need to in the future.

## *Consent Configurations*

This section provides a sample setup for each type of consent you can support: blanket, category, or vendor level consent.

### *Blanket (all or nothing) Consent*

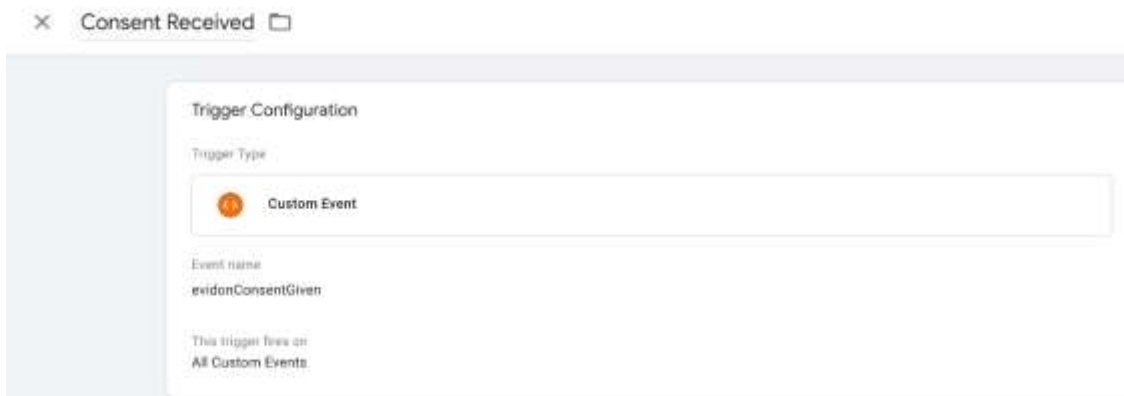
This is the most basic type of consent. Effectively you just look to see if the user provided consent or not, and then execute the tags behind the consent wall on the consent event received. This type of consent ignores the incoming categories and vendors.

#### *Create the Trigger*

To support consent, you need to set up a trigger that receives the consent and can be assigned to the tags that need to be behind the consent wall. Here are the steps we recommend creating the trigger:

1. Enter the Trigger section in you GTM
2. Create a new Custom Event Trigger
3. In the Event Name enter: evidonConsentGiven
4. Leave the "All Custom Events" selection on
5. Give the trigger a meaningful name
6. Save the trigger.

The configured trigger will look something like the following:



## *Configure the Tags*

For all your tag vendors who need consent you will need to add this trigger.

## *Category Level Consent*

If you are providing your users the ability to consent to specific categories, you can support that within GTM using the Evidon UCP consent support. When our tag triggers the consent event we include the list of categories the user has consented to. This is a comma-separated list of the category names you provided within the Evidon Privacy Application when you configured your Category Buckets.

This list will look something like the following: advertisers, social media, analytics, other

However, there is also a scenario where the site user just blanket consents to all vendor categories. When this happens the consent string will just contain the word: all

You will need to handle both scenarios in your consent configuration. This section will walk you through that configuration.

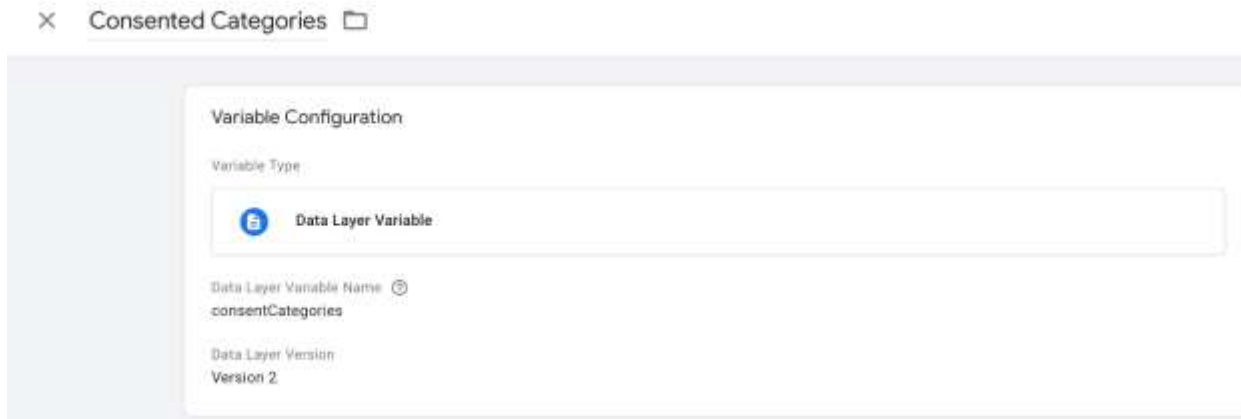
## *Create the Category List Variable*

The list of categories will be passed in through the data layer as a variable. To work with this information in GTM, it needs to be assigned to a variable. This section will walk you through creating the variable to hold the consented categories values.

1. Open the GTM Variables section
2. Click on the New button to create a new variable

3. Select “Data Layer Variable” as the type
4. In the data layer name input enter: consentCategories
5. You can leave the rest of the values as the defaults
6. Save the variable and give it a meaningful name. For rest of our instructions this name will be “Consented Categories”

It should look like the following:



### *Create the Triggers*

For category level consent you will need to create a Trigger for each category you have defined as well as one for the “All” category.

Here are the steps to create the all categories trigger:

1. Enter the Trigger section in you GTM
2. Create a new Custom Event Trigger
3. In the Event Name enter: evidonConsentGiven
4. Change the trigger so it fires on Some Custom Events
5. Select the variable you created to hold the consent categories. Consented Categories in our example.
6. Set the condition to “equals”
7. In the final value input enter: all
8. Give the trigger a meaningful name such as “All Categories Consent Received”
9. Save the trigger.

Once you have set this up it should look like the following.

× All Categories Consent Received

Trigger Configuration

Trigger Type

Custom Event

Event name

evidonConsentGiven  Use regex matching

This trigger fires on

All Custom Events  Some Custom Events

Fire this trigger when an Event occurs and all of these conditions are true

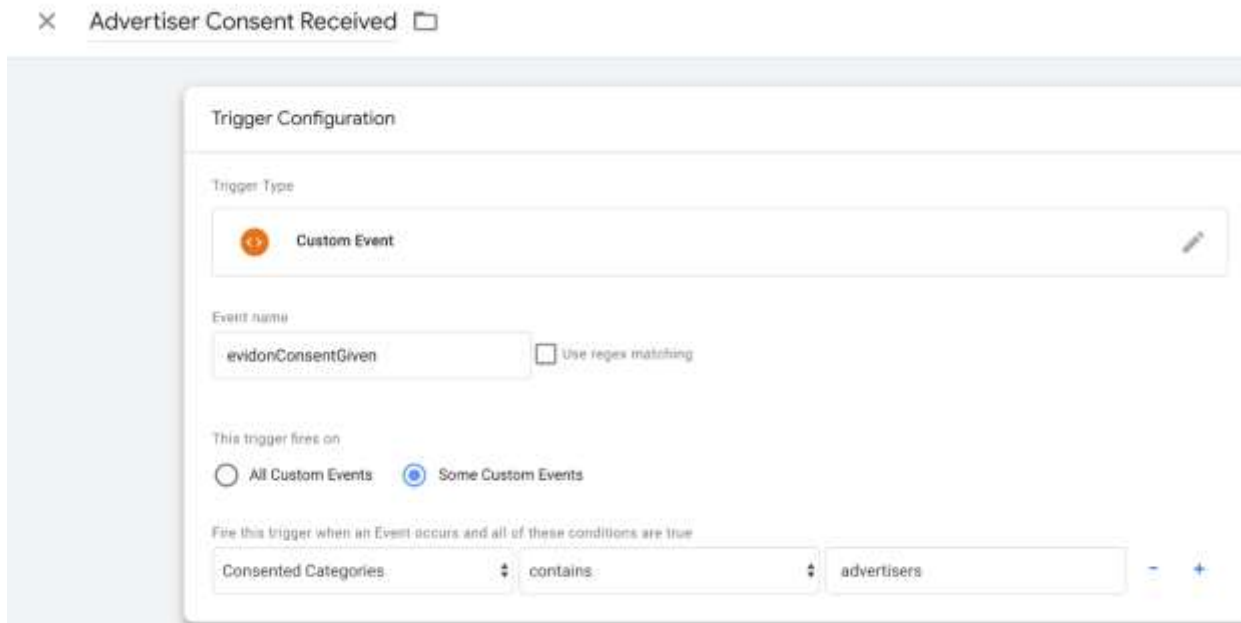
Consented Categories equals all

Now create the category-specific triggers. We are going to give you an example of how one of them would look, just repeat the process for all the categories you will support.

Here are the steps to create the category-specific trigger:

1. Enter the Trigger section in you GTM
2. Create a new Custom Event Trigger
3. In the Event Name enter: evidonConsentGiven
4. Change the trigger so it fires on Some Custom Events
5. Select the variable you created to hold the consent categories. Consented Categories in our example.
6. Set the condition to “contains”
7. In the final value input enter the category name (lowercase). Ex: advertiser
8. Give the trigger a meaningful name such as “Advertiser Consent Received”
9. Save the trigger.

When you are finished it will look something like this:



### *Configure your Tags*

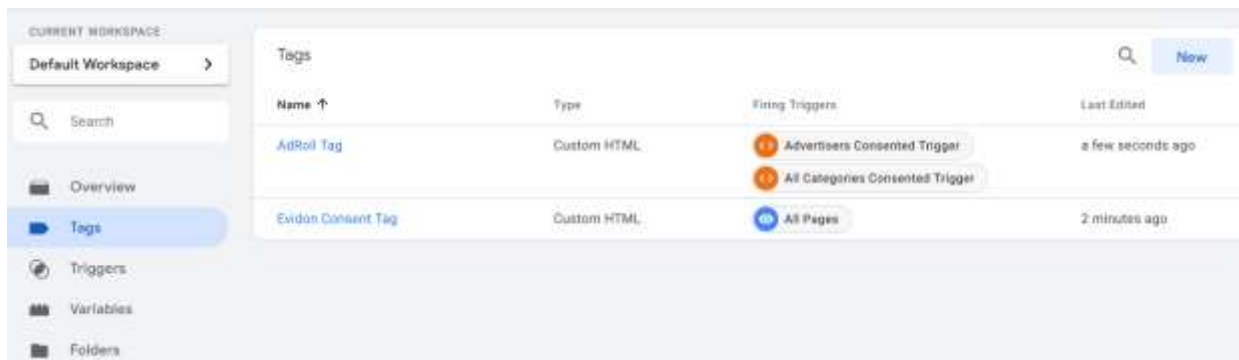
To support category consent on your tags you need to set up the tags to have the correct type of category consent assigned to them. This section will walk you through setting that up.

4. Open or Create the Tag you are adding to the consent wall.
5. In the Triggers section assign the All Categories trigger you created and the appropriate Category Consent trigger for that tag.

Remember, triggers on a tag act as an “OR” condition, so if either of them execute the tag will fire.



Once you have set up the tag and saved it, it should look something like the following:



### Vendor Level Consent

If you are providing your users the ability to consent to specific vendors, you can support that within GTM using the Evidon UCP consent support. When our tag triggers the consent event we include the list of vendors the user has consented to. This is a comma-separated list of the vendor level names you provided within the Evidon Privacy Application.

This list will look something like the following: adroll, google, mediamath

However, there is also a scenario where the site user just blanket consents to all vendors. When this happens the consent string will just contain the word: all

You will need to handle both scenarios in your consent configuration. This section will walk you through that configuration.

### Create the Vendor List Variable

The list of vendors will be passed in through the data layer as a variable. To work with this information in GTM it needs to be assigned to a variable. This section will walk you through creating the variable to hold the consented categories values.

1. Open the GTM Variables section
2. Click on the New button to create a new variable
3. Select "Data Layer Variable" as the type
4. In the data layer name input enter: consentVendors
5. You can leave the rest of the values as the defaults
6. Save the variable and give it a meaningful name. For rest of our instructions this name will be "Consented Vendors"

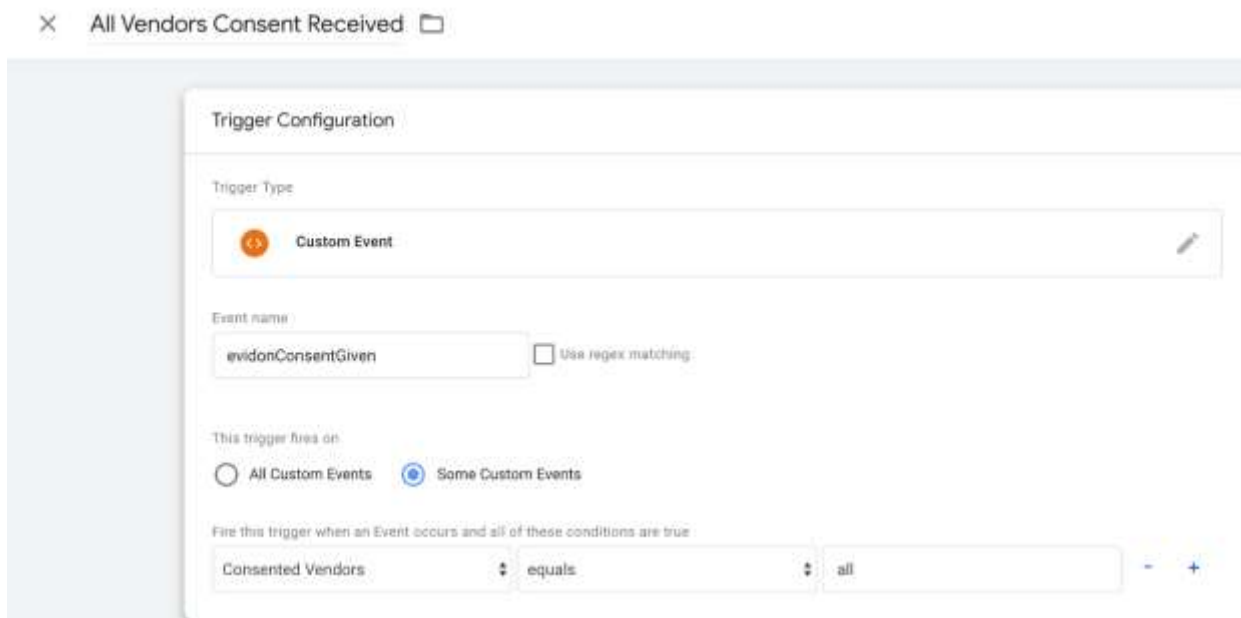
## Create the Triggers

For category level consent you will need to create a Trigger for each vendor you have defined as well as one for the “All” to capture the all-vendor scenario.

Here are the steps to create the all vendors trigger:

1. Enter the Trigger section in you GTM
2. Create a new Custom Event Trigger
3. In the Event Name enter: evidonConsentGiven
4. Change the trigger so it fires on Some Custom Events
5. Select the variable you created to hold the consent categories. Consented Vendors in our example.
6. Set the condition to “equals”
7. In the final value input enter: all
8. Give the trigger a meaningful name such as “All Vendors Consent Received”
9. Save the trigger.

This is an example of what this trigger would look like:



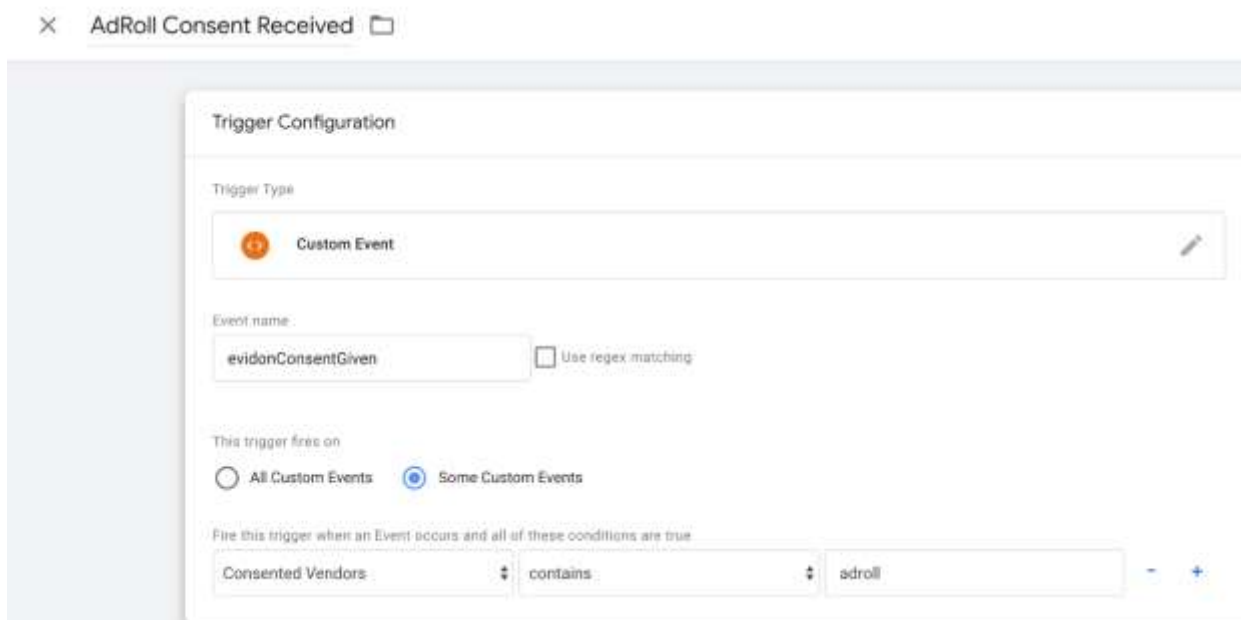
Now create the vendor-specific triggers. We are going to give you an example of how one of them would look, just repeat the process for all the vendors you support.



Here are the steps to create the vendor-specific trigger:

1. Enter the Trigger section in you GTM
2. Create a new Custom Event Trigger
3. In the Event Name enter: evidonConsentGiven
4. Change the trigger so it fires on Some Custom Events
5. Select the variable you created to hold the consent categories. Consented Vendors in our example.
6. Set the condition to “contains”
7. In the final value input enter the vendor name (lowercase). Ex: adroll
8. Give the trigger a meaningful name such as “AdRoll Consent Received”
9. Save the trigger.

When you are finished it will look something like this:



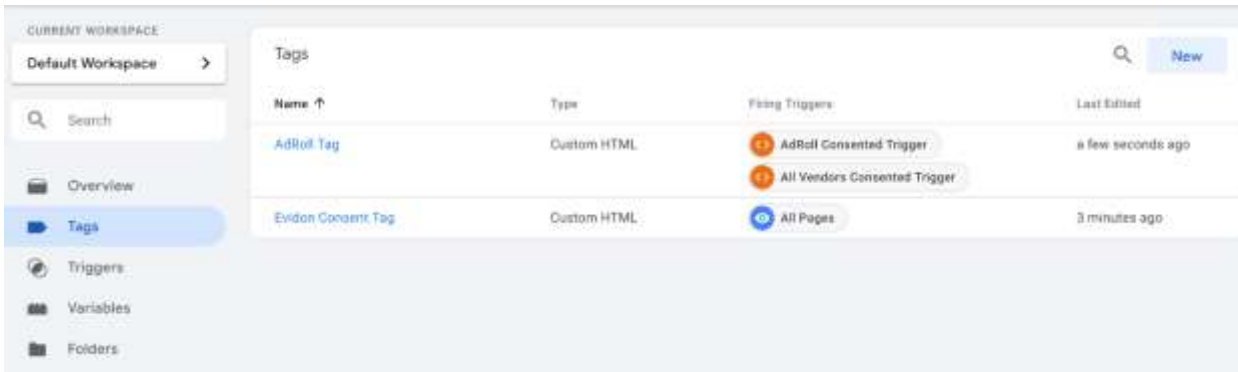
### Configure your Tags

To support vendor consent on your tags you need to set up the tags to have the correct vendor consent trigger assigned to them. This section will walk you through setting that up.

5. Open or Create the Tag you are adding to the consent wall.
6. In the Triggers section assign the All Vendors trigger
7. Assign the specific Vendor trigger for the tag
8. Save the Tag settings

Remember, triggers on a tag act as an “OR” condition, so if either of them execute the tag will fire.

Once you have set up the tag and saved it, it should look something like the following:

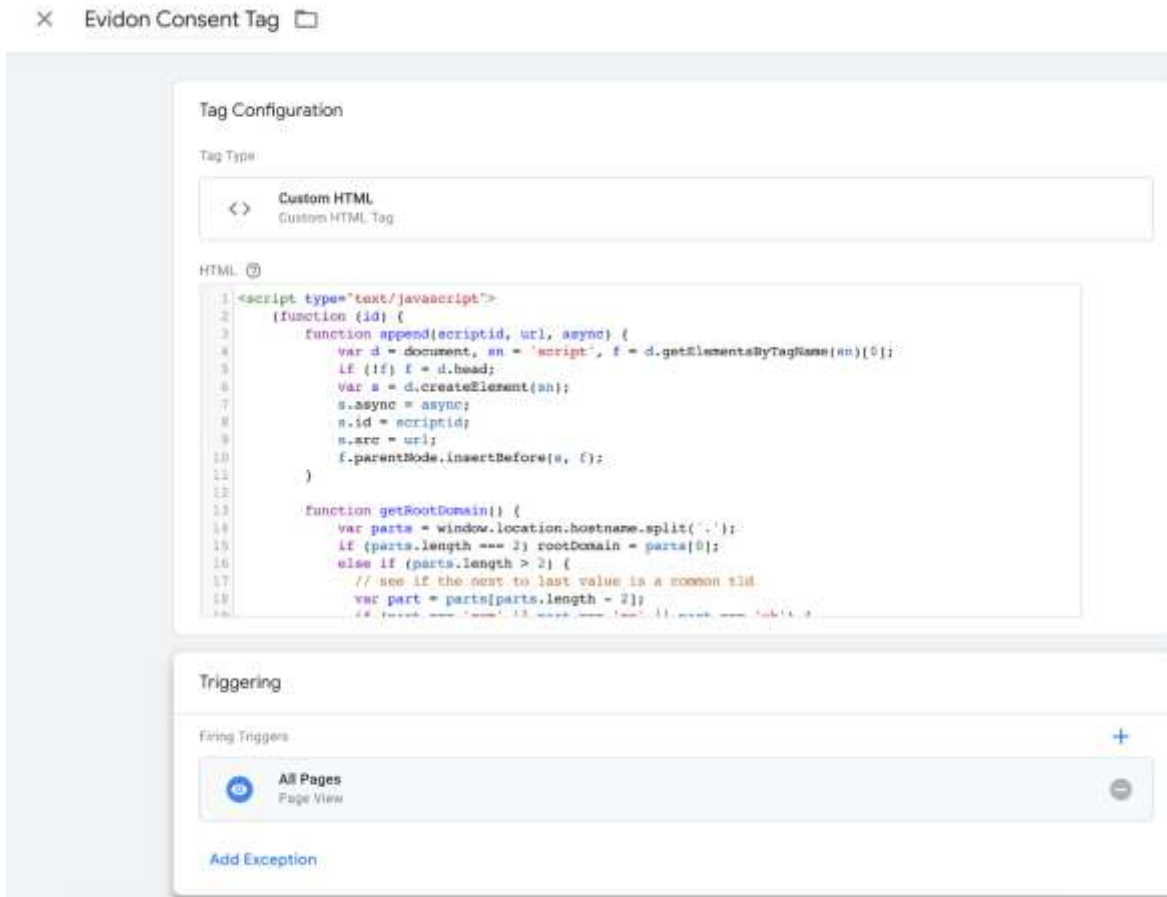


### *Adding the Evidon UCP Tag to GTM*

If you also want to deploy the Evidon UCP tag through GTM that is easy to set up. Just create a new Tag in your GTM platform and add in our script. Here are some detailed steps:

1. Create a new Tag
2. Select the Custom HTML tag type
3. In the HTML input paste in the tag you retrieve from the privacy application. Make sure you include the open and closing <script> tags.
4. Set the trigger to All Pages. You want this to load on every page as soon as possible.
5. Give the tag a name such as Evidon Consent Tag
6. Save the tag.

Here is an example of how this should look:



This will add the Evidon tag to your implementation and instruct it to drop on every page load.

## Things to consider about deploying the UCP tag through GTM

You need to remember that everything is a trade-off for these scenarios. Using GTM makes managing your tags easier and makes deployment very simple.

But, for things like deploying the UCP tag through GTM it will add a bit more latency to the overall tag loading. This is unavoidable. If you deploy UCP directly onto your site pages, it will execute immediately as the page loads. If you deploy through GTM it will need to wait for GTM to load first and then pull down the initial set of tags to execute on page load. Since any tag behind the consent wall needs to wait for UCP to load, pull the settings, and look for consent (or show the consent interface) this will add latency to that whole process.

## Testing



It is critically important you thoroughly test your configuration. This should go without saying, but we frequently encounter customer issues where one or more of their defined triggers doesn't work. We don't want some of your tags not executing correctly because of some minor misconfiguration somewhere. Because most of the triggers work off text inputs the odds of something like a typo happening are high, so definitely make sure all the paths are working.

To test:

1. Set up a sample page (or use a dev/test environment you already have).
2. Switch the GTM tag so it is in "preview" mode
3. Open another tab in the same browser (highly recommend Chrome for this by the way)
4. Open the sample page in that window
5. Walk through all the different consent flows. This will take some time and attention to detail.