20R1 Veeva Commercial Vault Frequently Asked Questions

Standard Metrics

Q: Why is Veeva introducing Standard Metrics?

A: Veeva is in a very unique position as a market leader in the creation, management, and distribution of Lifesciences content. With over 400 PromoMats customers, Veeva has an obligation to give back to our customers and provide answers to the questions that we receive on a regular basis such as:

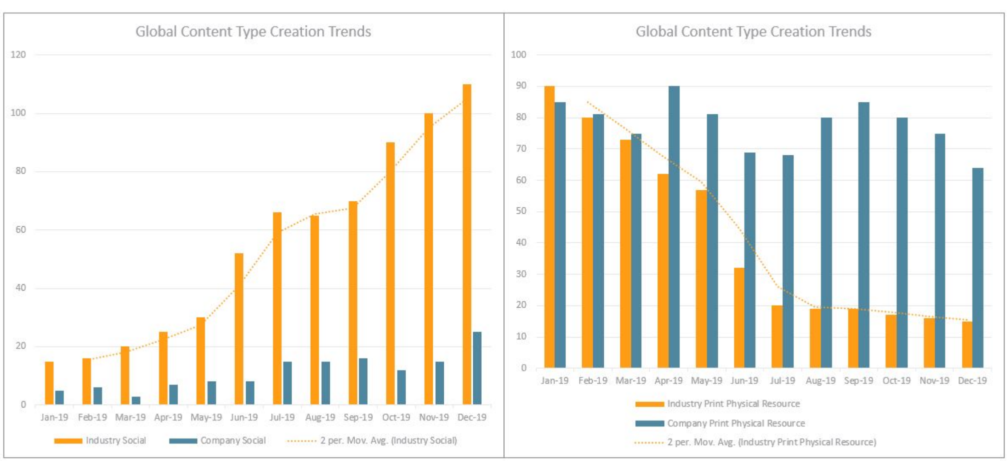
- How long does the average material sit in review?
- What is the average amount of time that a material takes to reach approval?
- How many review cycles should my content be going through?

This free service will give customers the ability to see industry benchmarks and compare themselves against their Life Science peers for the very first time based on an actual data set.

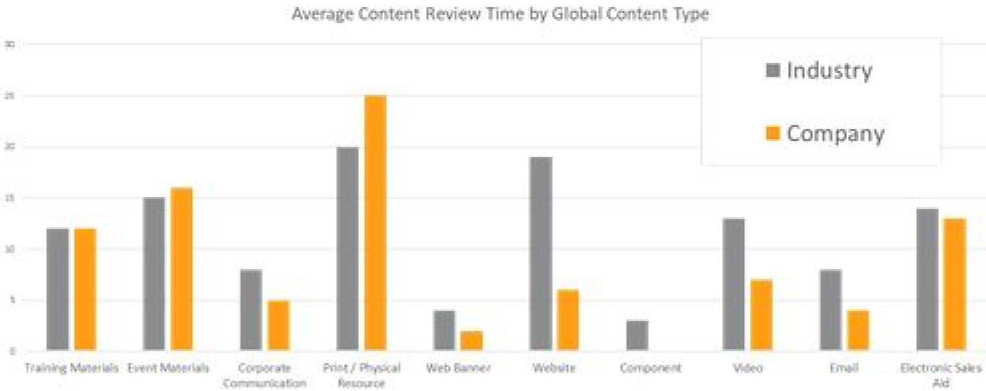
Q: Can you clarify the information we can benchmark against the industry? Can we benchmark review cycle timelines or only cost or both?

A: An example of what you may be provided as part of the benchmarking data is trend analysis so you can see how your company benchmarks against the industry average. The benchmarking data will only show anonymised average industry data vs your company data so you will not be able to identify other customer data. In this example you can see industry trends for social and print material. Here the industry average is using more social and less print material however this customer is not following industry trends so maybe they need to consider why they are not and if they need to make some changes.

Trend Analysis



In this example the customer content review time is significantly longer for Print/Physical Resource review than the industry average, so maybe the customer should understand why that is, and if necessary make some changes.



Q: When will the reports be distributed?

A: Initial Industry-level data distribution will be shared in 2021. The current thinking is that the initial output will be a PDF that is shared with the customer in a meeting to allow for questions and open discussion about the data and the insights that can be drawn from it.

Q: What fields will be added with Standard Metrics?

A: In 20R1 standard metrics will be auto on for all PromoMats vaults. There will be nine Veeva-defined fields in all PromoMats Vaults:

- Three (3) user selected fields will be non-mandatory in 20R1 for each document created (Global Content Type, Content Creation Currency & Content Creation Cost) . In 20R2 these 3 fields will become mandatory. However default values can be set up in admin.
- Six (6) system calculated fields will auto-populate as the material moves through the review and approval process (Initial in Review Date, Initial Steady State Date, Days to Enter Review, Days in Review, Number of Review Cycles, Days to Approval)
- To take advantage of Standard Metrics Customers need to ensure that they have the Lifecycle states set on their promotional materials document types for Steady State & In Review State
    - If these are not set then the calculated Standard Metrics fields will not populate on the materials

Q: How are the Standard Metrics user-selected fields Global Content Type & Content Creation Cost defined?

A: Global Content Type: Veeva has reviewed 1000s of picklist records and identified what we believe to be a globally agnostic taxonomy for Life Science promotional materials. This list is expected to evolve over time but below is the list that is expected to be released in the 20R1 (April) with examples of customer content.

Global Content Type	
Picklist	**Examples**
Corporate Communication	Press Releases, Internal communications
Social	Facebook shells & posts, Twitter posts, etc.
Paid Search	Ads to be displayed on search engine results
Web Banner	Banner Advertisements for paid placement, Pandora ads etc.
Mobile Apps	Mobile application screenshots
Electronic Sales Aid	Edetail screenshots submitted for Advertising and Promotion Review
Email	Any email screenshots submitted for Advertising and Promotion Review and Approval
Health Authority Form / Compliance Package	Materials generated for a Health Authority submission or included as part of a compliance binder
Component	Images, Photographs, Auto-Linked Components, etc. to be used to create other materials
Event Materials	Materials developed for use at live events such as congresses, advisory boards, internal meetings such as booth panels and displays, attendee material packets, name cards etc.
Print / Physical Resource	Print Sales Aid, Patient Brochure, Coupon/Co-Pay, Reprint, Exhibit item, Giveaways
Reference Materials	References, Claims documents, Labelling, Data on file, Attachments, Zinc Migration Gallery Items, Supporting Documents
Training Materials	Materials developed for the sole purpose of training customer teams or consultants inclusive of Speaker Training, Internal Training, Sales Training etc.
Video	
Website	
Other	Does not fit into any category listed above or Any materials developed to be served on a Veeva platform such as assets associated with approved email (fragments), CLM content (slides), etc.

Content Creation Cost & Content Creation Currency: Veeva put a lot of time and effort into the development of a clear definition of cost. Based on the questions we typically receive from customers we defined the Standard Metrics Content Creation Cost as "The Cost paid by the Life Sciences customer for the development of the promotional item"

- This cost should not include media buy, print production, or Ad/Promo reviewer time costs.
- The definition at this time is limited to the agency or internal partner development costs
- If Customers choose to include Content Creation Cost, they will be required to select the currency as well to ensure appropriate reporting of the data

Q: How are the Standard Metrics system calculated fields generated?

A: Once Standard Metrics is enabled and provided the lifecycle system states have been set for 'In Review' and 'Steady State' then the system will begin collecting this data in the customer content ecosystem allowing the ability to run reports through standard reporting at their discretion. We are currently calculating fields using the following formulas.

- ***Initial in Review Date*** – The date the document entered an "In Review" system state for the first time

- ***Initial Steady State Date – The date the document entered the System Defined Steady State for the first time***
- ***Days to enter review*** – The time (in days) between the jobs creation date and when it entered an "In Review" system state for the first time
- ***Days in Review*** – Time the job first entered the "In Review" system state to time the job entered the system "Steady State" for the first time
- ***Number of Review Cycles*** - The cumulative number of times a document enters the "In Review" system state before it reaches its "Steady State" for the first time
- ***Days to Approval*** – The cumulative time (in days) between the jobs creation date and when it entered the system "Steady State" for the first time

Q: Will any Standard Document Types that are not going through MLR have a default value?

A: These standard documents types will automatically default to the following global content types (unless the user changes the default) and currency and cost will default to Decline to Provide. The default GCT will be updated from 19R3 to 20R1. However if a customer changes the default GCT to a different value, those will NOT be changed in 20R1

Standard Document Type	Global Content Type Attribute in 20R1	Global Content Type Attribute in 19R3
Base		
Event Material	Event Material	Multichannel
InDesign Component	Component	Auto-Linked Component
Health Authority Form	Health Authority Forms / Compliance Package	Health Authority Forms / Compliance Package
Compliance Package	Health Authority Forms / Compliance Package	Health Authority Forms / Compliance Package
Multichannel Presentation	Other	Multichannel
Multichannel Slide	Other	Multichannel
Email Template	Other	Multichannel
Email Fragment	Other	Multichannel
Master Email Fragment	Other	Multichannel
Template Fragment	Other	Multichannel

Q: Can customers map their current document types to populate the new Standard Metrics required fields?

A: Yes - Once Standard Metrics is enabled customers will have the ability to map their document types in the configuration section of PromoMats. Veeva team members can use the Standard Metrics Mapping Assistant Tool available for download on share to help provide a base set of recommendations for a customer to react to.

Q: I can't find accurate default picklist values for some document types?

A: We released Standard Metrics as an opt in feature in Dec last year, and in working with our customers for customer success, we've identified some picklist item changes that will be released in April 2020 (20R1 release). The values in red will be made INACTIVE, and the items in green will be added in April 2020. If there are document types that don't go through an MLR review process that you can't find a picklist value for then please use 'Other'.

19R3 Release	20R1 Release
Corporate Communication	Corporate Communication
Digital	Social
	Paid Search
	Web Banner
	Mobile Apps
Electronic Sales Aid	Electronic Sales Aid
Email	Email
Health Authority Form/Compliance Package	Health Authority Form/Compliance Package
Image	Component
Auto-Linked Component	
Meeting Materials	Event Materials
Print / Physical Resource	Print/Physical Resource
Reference Materials	Reference Material
Training Materials	Training Materials
Video	Video
Website	Website
Multichannel	Other
Other	

Note: Red = will be made INACTIVE in 20R1. Green = will be added in 20R1

Q: What if I do not use sub-type or classification in my document types, can I still map?

A: It is recommended that customers with this configuration select the Global Content Type, Currency & Creation cost for each material

Q: Will ALL documents in Promomats require Standard Metrics fields?

A: In 20R1 the standard metrics fields are non-mandatory, however they will be mandatory in 20R2, so from August 2020 all document types will require Standard Metrics fields. If a document is uploaded as unclassified then standard metrics is NOT required, until the document is classified as a doc type. You can mitigate the impact of this by mapping default Global Content Type for each doc type in Configuration>Doc Types and map Content Creation Currency for all docs in Admin Settings.

Q: Can I populate the user-selected fields at another point in my workflow or will they always be required at place holder creation or document upload?

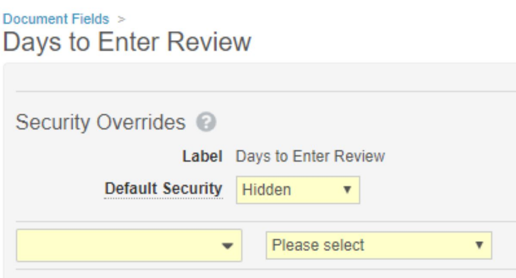
A: In 20R1 the standard metrics fields will be non-mandatory so you can populate them whenever you want to. However from 20R2 (August 2020) the Standard Metrics user-generated fields will be required at placeholder creation/document upload. The field remains editable even after the document has reached steady state..

Q: We create a placeholder first, will it count from that date?

A: The count will start from the job creation date.

Q: Can I hide the Standard Metrics fields?

A: Before the 20R2 release (August 2020) the 3 user input fields are non-mandatory and therefore can be hidden by document field > Security Overrides. The 6 autogenerated fields can be hidden through document fields > security overrides.

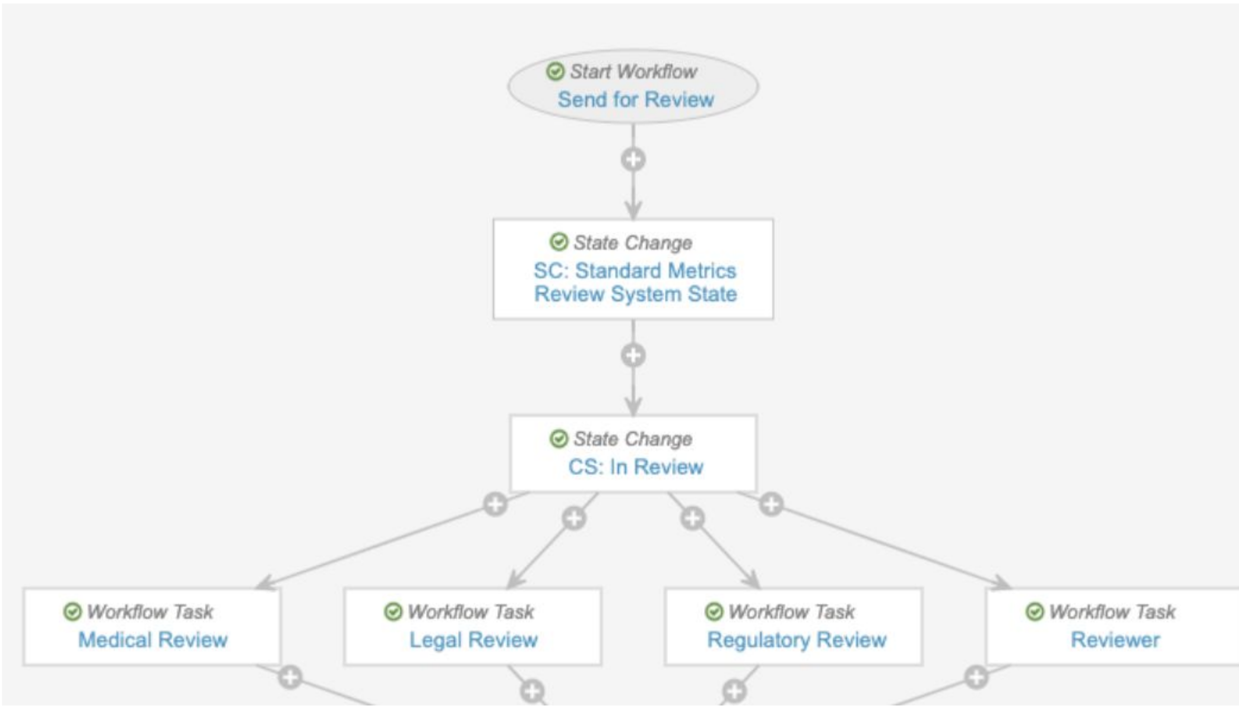


Q: How will the required fields be communicated to users?

A: Veeva will provide standard documentation for all customers to leverage in the communication of Standard Metrics fields. Additionally, Veeva will host webinars for customers and our agency partners in the alliance program. For more information https://www.veeva.com/vault-promomats-standard-metrics/

Q: What do you enter as In Review System State if Global vs Country X use the same Material Lifecycle but different In Review system states?

A: Set the state on the document to whatever the In Review system state type is and then have it back to whatever the working state is that the customer is using. For example see the workflow below:



Q: When should the config changes be enabled by?

A: Before 20R2 release (August 2020)

- Set System States for Promotional Material Lifecycles for In Review, Steady State
- Communicate to users what the Standard Metrics fields & picklists mean
- Optional - Map Global Content Type & Currency

Q: What if I don't enable the Standard Metrics from application setting before 20R1?

A: Standard metrics will be turned on for all PromoMats Vaults at 20R1 release whether or not standard metrics was enabled before that date.

Q: Is there any GDPR impact with Standard Metrics?

A: The Standard Metrics feature will record lifecycle metrics against each document, this is essentially additional metadata similar to other values we store against documents and is stored in each customers Vault along with the customer's other data. There is no GDPR impact of storing these values and no personally identifiable information is used in their calculation or storage. At the point that we analyse the Standard Metrics from all Vaults to establish an industry benchmark, we will only use aggregate level data for document types, for example the average days in review for documents of type video. There will be no personally identifiable data used in this analysis nor will it be possible to identify specific customers from the benchmarks.

Q: Where will the data be stored, who will have access to it and will it be encrypted?

A: The data is stored as standard document fields in a database on the server, and will have the same restrictions / access control as any other PromoMats field. The data is not encrypted but access to the database, and via Vault, is restricted.

For more information about standard metrics please go to https://www.veeva.com/vault-promomats-standard-metrics/

Auto Claims Linking improvements

Q1: How do I enable Vault Auto Claims Linking for specific document types?

A: To enable the Suggest Links action on documents of a given type, edit the Document Type in admin and select the Enable Suggested Links Action radio button. This is typically done on the Promotional Materials doctype(s). Note that until you enable one or more types for the Suggest Links action, this feature is not visible to end users. You will also need to enable one or more doctypes to serve as references on Claims by enabling the Suggested Links Target radio button in Doctype Admin. This is a prerequisite for adding References to Claim records, and is typically done on Reference doctype(s).

Q2: Who in the organization should manage the Claims Library? What is the level of effort to launch an entire claims library for one brand?

A: There are two primary roles involved in curation of the Claims Library, although both can be performed by the same individual or members of a team.

First someone needs to manage your reference documents, including anchors within those documents. This person/s should be able to upload and up-version references documents, identify duplicate reference documents, move copies to an obsolete state, and (most importantly) be able to create, update, and delete anchors within those reference documents. This person should have a broad set of Permission Set and Lifecycle State permissions, as defined below.

Second, someone needs to manage your Claims Library. This person should understand the Vault Auto Claims Linking feature well enough to effectively monitor changes to the claims library and assist in trouble-shooting the results of the Suggest Links action on documents. This person should have a broad set of permissions on all the object types related to this feature, including Claim, Claim Target, Link Target and Match Text Variations.

In terms of the effort required, once configuration is complete, and the right references are available for selection, it should take minutes to create and approve a claim. Depending on the number of claims and references required for a single brand, it might be hours or a few days to build your primary set of claims, including references and Match Text Variations.

Q3: Should I create a custom tab for my claims?

A: Yes! A claims tab provides easy access for users to your Claims library. And you can use access controls and object permissions to make sure each user and group sees only the relevant and appropriate list of claims. Note that only users with View permission on claims object and on claims tab will see the claims tab.

Q4: What permissions are needed to perform Suggest Links?

A: Same as for manual reference linking: View Content, Annotate, Edit Relationships

Q5: What permissions do I need to create and manage claims, including their references?

A: First, to fully enable claims management, including references on claims, make sure you have Object Permissions Read, Create, Edit, Delete on Claim, Claim Target and Link Target. You also need Object Action Permissions View, Execute on Link Target. (Depending on your Vault configuration, you may also need to configure DAC roles and sharing rules to allow for Read and Edit access to claims.)

Second, to control references (documents) and anchors within those documents, make sure you have Annotate and Create Anchor Lifecycle State permission for reference documents, and Annotate and Edit Relationships Lifecycle State permission for materials documents, and Manage Anchors and Merge Anchors Permission Set permission.

Q6: If I perform Suggest Links action, but don't finish accepting or rejecting all the suggestions, will they still be there later, even if my session expires?

A: Yes. Once anyone creates Suggest Links on a document version, they remain unless any user accepts or rejects them, or some other uncommon event (like document re-render) deletes them. There is no problem caused by leaving suggestions in the pending state indefinitely.

Q7: I performed Suggest Links but would like my colleague to approve some of the Suggested Links. Is that OK?

A: Yes! Any user with Annotate and Edit Relationships permissions can Accept or Reject any Suggested Links on a document, regardless of who performed Suggest Links action. Keep in mind that whoever accepts a Suggested Link becomes the "author" of the resulting link annotation.

Q8: Can I tell whether a reference link was created from an accepted Suggested Link, versus manually via link tool?

A: Yes! Link annotations created from a Suggested Link display a 'lightbulb' icon in the info card, whereas manually created links display a 'chain link' icon.

Q9: Does Vault require an exact (100%) match on content?

A: Yes. Any variation between match text in a claim record and the text of a document will prevent matching. However, we are adding support for both match text variations and match text wildcards, which will greatly improve the flexibility of matching.

Q10: Is text matching case sensitive?

A: No. Matching is case insensitive.

Q11: What about extra spaces, line breaks, and returns?

A: Vault ignores extra spaces, line breaks, and returns, so matching should still work.

Q12: How many custom matching fields can we add to the claims object?

A: You can add up to 5 custom matching fields to the claims object. Note that only object reference and picklist fields operate as matching criteria between claims and documents, and only when the same field exists on both claims and documents. There is no limit on non-matching custom fields on the claims object.

Q13: Is there a limit to the number of claims that can be in my claims library?

A: Each Vault can have up to 500 match text values (primary and variations) in claims with identical matching criteria. For instance, if you have a claim with product: Cholecap and country: Canada, with three match text variations, that counts as 4 'records' within the allowed 500 for that product/country combination.

Q14: What other limits are imposed by this feature?

A: The Suggest Links action is disabled on documents with 1,000 or more pages. The Match Text field on a claim record must have at least 20 characters and cannot have more than 1,500 characters. Talk to your CSM about additional limitations.

Q15: Does this feature support other languages?

A: Yes. It should support any languages that are currently supported in Vault. (We have found a few exceptional cases, such as with combined characters in some Asian fonts. We are working to address those.)

Q16: If I want to match a given claim statement in multiple languages, should I create multiple claim records?

A: It depends. The customer must decide how a given claim should map to countries and regions. You can have a single claim record serve all languages in a multi-language country such as Canada. Match Text Variations is a great fit for that scenario. Between the primary match text value and the maximum nine match text variations, you can map the same supporting references to up to ten languages within a single claim record.

But if you want a given claim statement to have distinct references for each language, or even the same language in two geographies (EX: Spain Spanish versus Mexico Spanish), then you'll need multiple claim records.

Remember that you can also add custom matching fields (picklist or object reference) to the claims object. This will allow you to map claims to documents on additional parameters such as region (APAC, EMEA, Americas) and/or language.

Q17: Can you auto link images as well as text?

A: Not at this time, but that is on the roadmap.

Q18: I'm trying to add references to claims in my claims library, but no documents or anchors appear in the Select Anchors dialog.

A: First, make sure at least one doctype (typically "references") is configured in admin for targeting by Suggested Links. If you've done that, and you still don't see any documents, then you may not have View permissions on any documents of that type. (You need View Document to see and select documents, and View Content to see and select anchors within those documents.)

Q19: I ran the Suggest Links action on my document, but there are no Suggested Links as a result. Why?

A: There are several reasons why you might not get any Suggested Links.

1. The claim statements in the document do not exactly match any Match Text values in the claims library. This can happen for several reasons, including uncommon text effects or non-linear layouts in the source document.

2. None of the approved claims have matching field values (Product, Country, or any other object reference and picklist fields) that match the equivalent fields on the document.
3. None of the matching claim records are in approved state. (Only approved records are available to the Suggest Links action.)
4. Some combination of the above.

Q20: How many Match Text Variations can I have on my claim?

A: The default limit is 5. This can be revised slightly by support. But keep in mind that each variation counts against your limit of 500 per identical matching criteria.

Q21: If we are currently using claims documents, what is your recommended process for transitioning to claims records?

A: We recommend a careful content migration with a narrow focus. Begin with a single country, region and/or product, and manually copy/paste claim statements from the documents into claim records, and then add the same supporting references from the documents onto the claim records. Finally, we recommend making those claims documents obsolete, and also making any necessary configuration changes to prevent users from referencing the claims document going forward.

Q22: How can an agency get a list of approved claims that can be shared across the team while tactics are being developed? Is there an export or download function?

A: First, you can always export records from your claims library to CSV or Excel. But if your agency users have access to your Vault, you can configure an approved claims tab and use access restrictions to share only the relevant approved claims (by brand or region, for instance) with each agency team. This is a best practice that will create familiarity with the claims library, and also enforce consistency across promotions in order to reinforce precise brand messaging.

Q23: What material types will this work on (e.g., PPT, video, image renderings of html)?

A: Any documents that have indexable (selectable) text are eligible for Vault Auto Claims Linking. However, you must enable the Suggest Links action in DocType admin for each type.

Q24: How can we determine where (in what materials) a given claim has been used to create references?

A: We are working on a Where Used component for the claim record detail page, which will do just that. Stay tuned.

Q25: Can a claim be approved for a limited time period?

A: We recommend you add a Review Due Date as a participant control for a reviewer. When setting up the workflow task for reviewing, you can use this date control as the task due date.

Enhanced Medical Inquiry Email Capabilities

Q: I have the feature turned on, why have I not received any notifications about emails?

A: Notifications will only be sent to the Vault user when the email has failed to deliver. To avoid sending unnecessary additional notifications, notifications are not sent for emails that are received by the case contact. To confirm that the email successfully reached the case contact, check the Case Response object's audit trail.

Q: Why have I not received a bounced email notification when I have sent a case response email to an email address that I know doesn't exist?

A: Bounced email notifications may not be immediate, you may need to wait a short amount of time until the bounce is detected. Vault may make several attempts to send the email, in case the problem is temporary. The bounce notification will be sent when it has stopped trying to send the mail.

Q: Why can't I see the Case Response Emails in my email Case Response object?

A: It may be necessary to add the Case Response Emails related object section to the page layout. Ensure that "Prevent record creation" is ticked.

Q: I have dismissed the notification, how do I check the reason that the email bounced?

A: The Case Response object audit trail retains the bounce time and reason, you can look there.

Q: Why does the Email Bounce Reason include additional information?

A: Vault passes the Email Bounce Reason it receives from the case contact's email email system directly back to the user in the notification. This could, for example, come from Microsoft Exchange or Gmail; each email system provides its own set of bounce reasons. Vault surfaces the entire message in order to ensure the appropriate information to diagnose the bounce is passed to the user.

Q: Why does the page not exist when I click on the Response Link URL that is saved in the Case Response Email?

A: The Case Response Email retains an exact record of the email that was sent. The link in the sent email will be retained, even if the link itself was set to expire after a certain number of days.

Excel Templates for Reporting

Q: Do all reports support Excel Templates?

A: All report types including multi-pass reports support Excel Templates. However, reports that use the matrix format are not supported.

Q: What Excel functionality is supported in templates?

A: Excel Templates support formatting, conditional formatting, formulas, pivot tables, macros and more.

Q: Do I need to be an advanced Excel user to use this feature?

A: You do not need to be an advanced Excel user to get benefit out of this feature. Just by downloading the sample template and uploading back to the report, you have the ability to export your report to Excel with an informative cover page. Modifying the formatting of your template is also a good starting point.

Q: How does the report know where I want the data to be populated in the template?

A: Inside of the sample template you will see a variety of tokens that look like this: ${text}. The ones included on the Coverpage correspond to report metadata such as report name. The ones included on the Export tab correspond to the columns currently selected in your report.

Q: Is Vault going to continue invest in reports now that this feature exists?

A: Yes, we will continue to invest in expanding Vault reporting's analytical and visualization capabilities.

Q: What types of files does it support?

A: XLSX and XLSM are supported.

Q: What are some important limitations related to this feature?

A:

- Only 100K rows may be included in Excel Template exports
- Only the first five tabs may include tokens
- Column tokens may only be defined on one row within a sheet

Additional questions?

Contact your customer support representative or post your question in the Vault community.