

## Standard Metrics FAQs - (Fields will be Required in 20R2)

### Q: What is Standard Metrics?

A: Standard Metrics is a Lifesciences specific dataset that allows PromoMats users to benchmark a select set of PromoMats data against their industry peers to answer the questions about Promotional Review & Approval that the Industry is asking.

### 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:

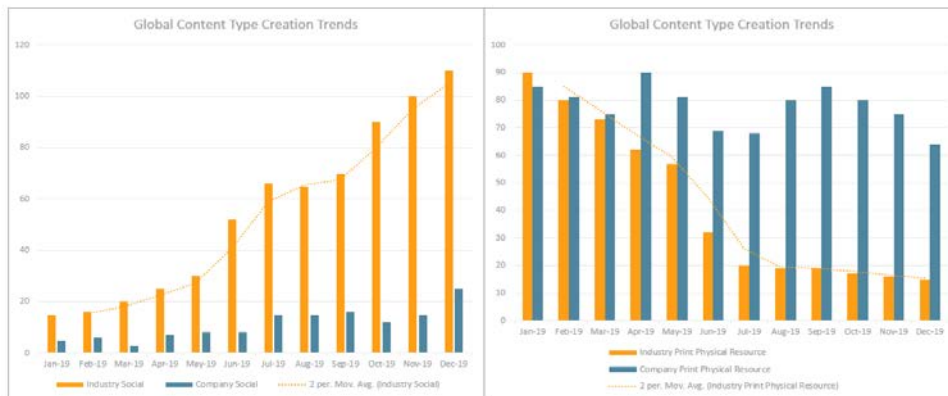
- How long does the average material sit in review?
- What is the average amount of time that a material takes to reach approval?
- How many review cycles should my content be going through?

This **free** service will give customers the ability to see industry benchmarks and **compare themselves against their Lifescience 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?

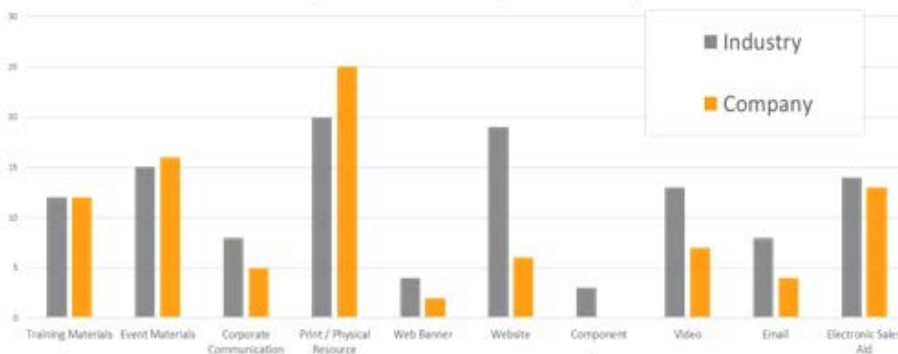
A: An example of what you may be provided as part of the benchmarking data is trend analysis so you can see how your company benchmarks against the industry average. The benchmarking data will only show anonymised average industry data vs your company data so you will not be able to identify other customer 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.

Average Content Review Time by Global Content Type



## **Standard Metrics FAQs - (Fields will be Required in 20R2)**

### **Q: Will the 3 user selected fields be required for 20R1?**

A: No, they will not be. As we continue to monitor the fast-evolving COVID-19 pandemic environment, we are quickly responding to this unprecedented situation in order to remain aligned with our customers and their priorities.

Right now, we appreciate that you are focused on business continuity operations such as enabling field force remote engagement. Standard Metrics is a strategic change for the industry and our customers have told us that they want to be able to launch this feature in the most effective way.

Therefore, we have decided to postpone Vault PromoMats Standard Metrics required fields from 20R1 (April 2020) to 20R2 (August 2020).

What does this mean for 20R1 release in April 2020?

- Standard Metrics will not be required in 20R1
- The Standard Metrics section will be visible in Document Information but will remain collapsed on Document Upload
- Veeva are committed to this requested feature and we encourage customers to prepare for 20R2
- Customers who are ready can begin using this feature to build reports and dashboards in preparation for the Veeva Industry Benchmark reports (mid-late 2021).

Veeva remains 100% committed to innovation and product excellence – we are not changing our release cycle or cadence. Veeva is proud to partner with you during this difficult time.

### **Q: Will the 3 user selected fields be required for 20R2?**

A: Yes, the 3 user input fields will be required for 20R2 (August) release.

What does this mean?

- Before 20R2 is released, configure the In-Review System State for all lifecycles that you want to measure standard metrics on. If you don't set this, then the Initial in Review Date, Days to Enter Review, Days in Review, Number of Review Cycles will be blank on materials that use that lifecycle.
- Standard Metrics section will be visible in Document Information and will be expanded as the 3 user input fields are required
- Should you want to bring consistency to the way Global Content Type is applied to documents and to save users a click you can map default Global Content Type values for each document type. This can be set up in Admin > Configuration > Document Types > Edit details
- Should you want to bring consistency to the way Content Creation Currency is applied to documents and to save users a click, you can map default Content Creation Currency at the vault level in Application Settings > Standard Metrics. If you select Decline to Provide (also known as 'N/A') as the default Content Creation Currency, then Content Creation Cost will default to Decline to Provide. For any other default currency selected the user will be required to enter a cost value.
- You can build reports and dashboards in preparation for the Veeva Industry Benchmark reports (mid-late 2021).

### **Q: Can I make the 3 user input fields required before 20R2 release?**

A: You will not be able to make the 3 user input fields required until 20R2. In 20R2 the 3 user input fields will become required for ALL PromoMats vaults.

### **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: How often will the reports be distributed?**

A: The frequency is still being determined but directional thinking is the results will be provided on a bi-annual basis

### **Q: Is Standard Metrics Available in my Vault Now?**

A: The timeline is as follows:

- 19R3 (December 2019) - Standard Metrics was released as an optional feature to allow customers time to map their existing document types to the Standard Metric Global Content Type.
- 20R1 (April 2020) - Standard Metrics was turned on for all PromoMats vaults, but the 3 user input fields are not yet required.

## Standard Metrics FAQs - (Fields will be Required in 20R2)

- 20R2 (August 2020) - The 3 user input fields will be required for all PromoMats vaults. Default values can be mapped for the 3 fields should a customer want to configure that.

**Q: Is Standard Metrics a product?**

A: No, Standard Metrics is a **free** service offered to PromoMats customers to benchmark their performance against the industry average.

**Q: Does Standard Metrics Require a license or have an associated cost?**

A: No, Standard Metrics is a **free** service provided as part of the standard PromoMats Implementation

**Q: When is Standard Metrics on for all PromoMats vaults?**

A: From April 17, 2020 (Release 20R1) Standard Metrics will be on for all PromoMats, Multichannel and OLS vaults. The 3 user input fields will be non-mandatory. Admin can set up certain default values to appear. In 20R2 release (August 2020) the 3 user input fields will be required.

**Q: What are the Standard Metrics fields?**

A: Nine new Veeva-defined fields have been added into all PromoMats, Multichannel and OLS Vaults:

- Three (3) user selected fields for each document created (Global Content Type, Content Creation Currency & Content Creation Cost). Default values can be set up in admin. These 3 fields will be mandatory in 20R2 (August 2020).
- Six (6) system calculated fields will auto-populate (provided the lifecycle system state for In Review has been set) 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 shown below:

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.

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- 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 first to ensure appropriate reporting of the data

**Q: If I set Content Creation Currency to default to Decline to Provide in Admin>Settings will Content Creation Cost default to Decline to Provide when a user creates a document?**

A: Yes, Cost will default to Decline to Provide if Content Creation Currency is defaulted to Decline to Provide in Admin > Settings > Application Settings > Standard Metrics.

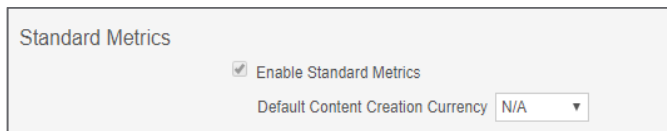
However, if the user has not set the currency to default to Decline to provide and instead manually selects Content Creation Currency field as 'Decline to Provide' on the document then they will need to manually select Decline to Provide on the Content Creation Cost field.

**Q: What if I don't want the cost of tactics included in my vault?**

A: The cost/value of Content is very important to your Content Strategy. The industry has told Veeva it wants to better measure effectiveness and ROI. It is advised that cost be provided for each promotional material as it will help to drive deeper metrics for internal evaluation. However, if your organization prefers not to include cost as part of standard metrics, set the default content creation currency to Decline to Provide in the ADMIN Application settings, or for 20R1 you can leave the Currency and Cost fields blank as they are not required in 20R1. However, they will be required in 20R2, so it may be worth preparing for this before 20R2 is released in August.

When setting the default currency some vaults will have 'N/A', other vaults will have 'Decline to Provide' but if either of those is selected that will mean that both Currency and Cost field will default to Decline to Provide when a document is created.

**"N/A" = Currency and Cost will default to Decline to Provide**

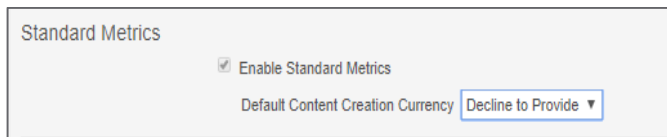


Standard Metrics

Enable Standard Metrics

Default Content Creation Currency N/A ▼

**"Decline to Provide" = Currency and Cost will default to Decline to Provide**



Standard Metrics

Enable Standard Metrics

Default Content Creation Currency Decline to Provide ▼

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

A: Once Standard Metrics is enabled; 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. Note, in order for these fields to be calculated correctly the lifecycle system state for 'In Review' and 'Steady state' must be set, otherwise the 6 autogenerated fields will be blank.

- **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: I created the document at 4pm 20 Aug 2020 and moved it to 'In Review' system state on 21 August at 9am. Why does Days to enter review = 0?**

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1 day = 24hrs, so in this example as it has been less than 24hrs since the system state for In Review was met, the Days to enter review is 0 and not 1.

**Q: Does the 'Days to enter review', 'Days in Review' and 'Days to Approval' include weekends?**

A: Yes

**Q: What should we map Medical content to?**

A: For documents that would normally be in MedComms, but for a customer happen to be in PromoMats, map these documents to Global Content Type 'Other'.

**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 Global Content Type 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. There are no changes to these planned for 20R2 release.

Standard Document Type	Global Content Type Attribute in 19R3	Global Content Type Attribute in 20R1
Base		
Event Material	Multichannel	Event Material
InDesign Component	Auto-Linked Component	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	Multichannel	Other
Multichannel Slide	Multichannel	Other
Email Template	Multichannel	Other
Email Fragment	Multichannel	Other
Master Email Fragment	Multichannel	Other
Template Fragment	Multichannel	Other

**Q: Which GCT picklist values will be inactive in 20R1**

A: The table below shows which GCT picklist values are active from 19R3 and what changes in 20R1. There are no planned changes of Global Content Type for 20R2 release.

Global Content Type Picklist values	19R3	20R1
Component	doesn't exist in 19R3	Active
Corporate Communication	Active	Active
Electronic Sales Aid	Active	Active
Email	Active	Active
Event Material	doesn't exist in 19R3	Active
Health Authority Form / Compliance Package	Active	Active
Mobile App	doesn't exist in 19R3	Active
Paid Search	doesn't exist in 19R3	Active
Print / Physical Resource	Active	Active
Reference Materials	Active	Active
Social	doesn't exist in 19R3	Active
Training Materials	Active	Active
Video	Active	Active

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Web Banners	doesn't exist in 19R3	Active
Website	Active	Active
Other	Active	Active
Image	Active	INACTIVE
Digital Promotion	Active	INACTIVE
Meeting Material	Active	INACTIVE
Multichannel	Active	INACTIVE
Auto-Linked Component	Active	INACTIVE

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

A: Yes - customers will have the ability to map their document types in the Admin > Configuration > Document Types > Edit details.

**Q: I can't find an accurate default picklist value 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 identified some picklist item changes that needed to be changed. These were released in April 2020 (20R1 release).

These values are now Inactive:

- Digital, Image, Auto-Linked Component, Meeting Materials, Multichannel

These were added as new values in 20R1:

- Social, Paid Search, WebBanner, Mobile Apps, Component, Event Materials

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'.

If you previously mapped any document types to a Global Content Type that is now inactive you will need to re-map this document type to an active value to avoid errors when creating and updating documents. If any documents were created which now have an inactive global content type, then this will need to be updated to avoid errors in future. Please work with your CSM or Services to identify which document types and which documents need updating as inactive Global Content Types will not show up when you look in your vault.

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	
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.

## **Standard Metrics FAQs - (Fields will be Required in 20R2)**

### **Q: We created a placeholder first; will it count from that date?**

A: Yes, the count will start from the job creation date.

### **Q: Can I move Standard Metrics section to lower down in the metadata list?**

A: Yes, you can do this.

### **Q: Do I need to update my permission sets?**

A: Standard permissions sets and any custom permission sets that exist before 20R1 will automatically have the 'read' access for Content Creation Currency and Content Creation Cost object. Any new custom permission sets created after standard metrics is required will need to be updated to give them 'Read' access for Content Creation Currency and Content Creation Cost objects, otherwise these users will not be able to select a record for those two fields. This will become important in 20R2 when standard metrics fields are required. From 20R2 users who create documents must have Read access to Content Creation Cost and Content Creation Currency or they won't be able to create documents. The only way around that is if the default Currency is set to 'Decline to Provide' in Admin, once that is set then these two fields will auto-populate to decline to provide.

### **Q: Can I hide the Standard Metrics fields?**

When 20R2 is released you will not be able to hide Global Content Type, Content Creation Currency and Content Creation Cost fields as they will be required. If admin are configuring default values to populate for all three fields then and you don't want your users to notice the fields the recommendation is to move standard metrics down to the bottom of the list of metadata. This can be done through Admin>Configuration>Field Layout.

### **Q: We are not ready for Standard Metrics; can we opt out?**

It is not possible to turn Standard Metrics off or hide it from users. However, if you need some more time to upskill users in how to enter valuable data for standard metrics you can:

1. Set Document Type 'Base' - Global Content Type to 'Other'. Go to Configuration > Doc Types > Base > Edit Details - Global Content Type select 'Other'.
2. Set default Content Creation Currency to 'Decline to Provide'. Settings > Application Settings > Standard metrics select 'Decline to Provide' (also known as 'N/A').
3. Move Standard Metrics to the bottom of the field layout. Configuration > Field Layout - move Standard Metrics to the bottom.

Note: Only customers who enter valuable Standard Metrics information will be eligible for receiving the anonymised benchmarking information

### **Q: Reclassify Documents**

- If a document has Global Content Type, Content Creation Currency, and/or Content Creation Cost fields = Not Specified and you reclassify the document, then those 3 fields will not update to mapped GCT or Currency for that new reclassified doc type. If you need these updated the user would need to manually update these.
- If a document has Global Content Type, Content Creation Currency, and/or Content Creation Cost fields = active value and you reclassify the document, then those 3 fields will not update to mapped GCT or Currency for that new reclassified doc type. If you need these updated the user would need to manually update these.

### **Q: When I 'Make a Copy' of a document will standard metrics fields copy over?**

For 20R2 there are a few different scenarios: (note GCT = Global Content Type)

1. If GCT on a document is marked as 'Not Specified', when you make a copy, the user will be required to enter a value for GCT even if there is a mapped GCT value.
2. If GCT on a document is marked as an active value, when you make a copy, the GCT will be copied over (not the mapped GCT value).
3. If Content Creation Currency on a document is marked as 'Not Specified' or as an active value, when you make a copy the field will default to the mapped Currency value if it is mapped. The Currency value from the document being copied will not be copied over.
4. If Content Creation Cost on a document is marked as 'Not Specified' or as an active value, when you make a copy the user will be required to enter a value, unless the mapped currency is 'Decline to provide' in which case the Cost field will default to decline to provide. The Cost value from the document being copied, will not be copied over.

## Standard Metrics FAQs - (Fields will be Required in 20R2)

### 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

### Q: When should the config changes be enabled by?

A: Before 20R2

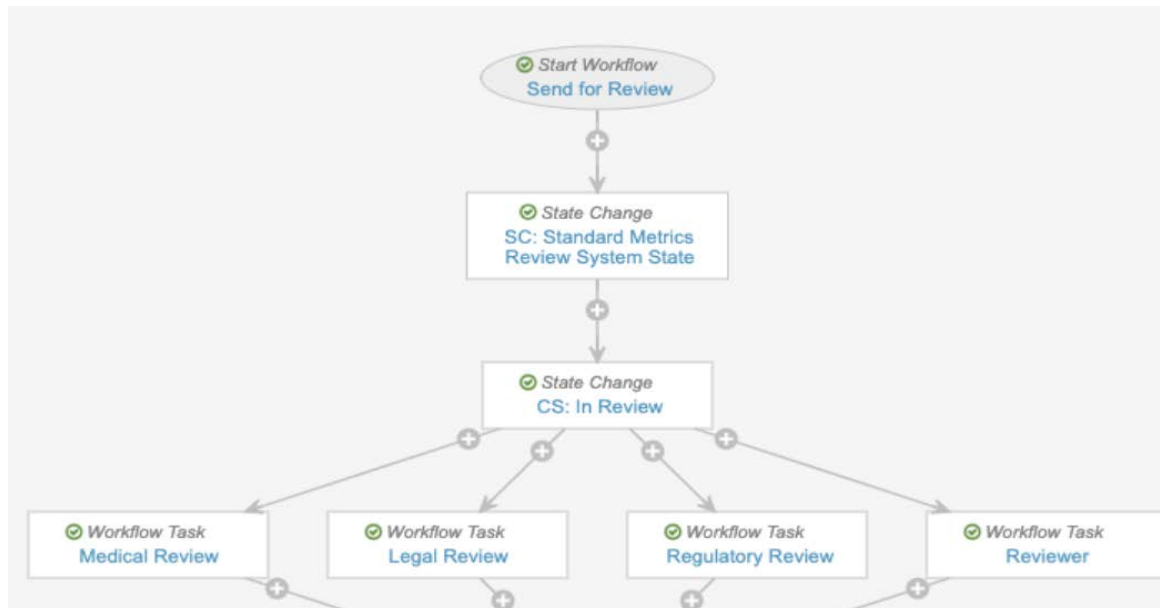
- Set System States for Promotional Material Lifecycles for In Review, Steady State
- Communicate to users what the Standard Metrics fields & picklists mean
- (Optional - Map Global Content Type & Currency)

### Q: 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 customer 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: What do you enter as In Review System State if the lifecycle has more than 1 initial In Review state?

A: Update your workflow so that you add a state change to set the state on the document to whatever the In Review system state type is, and then straight after that set a state change to the state that you want for that country's workflow. E.g. In this case the In Review system state is 'Standard Metrics Review System State'. But in this workflow it uses 'In Review' as the initial In Review state, so we have added a state change before the State Change to In Review.



### 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.

### Q: How do I copy over the Global Content Type configuration changes from sandbox vault to production vault?

A: Make sure you select the 'Global Content Type with Component Type 'Picklist' when creating the outbound package



## Standard Metrics FAQs - (Fields will be Required in 20R2)

Users & Groups Configuration Operations **Deployment** Connections Settings

Outbound Packages >

Migration: PKG-0001 ★ ACTIVE

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**Details**

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Name PKG-0001 Owner Pa  
Summary GCT & Doc Type Created Date 3/26/2020 8:14 AM EDT  
Description Last Modified Date 3/26/2020 8:13 AM EDT  
Outbound Package Type Migration

**Components**

+ Add  Q

Name ^	Component Name	Component Type	Last Modified Date
Campaign Toolkit	campaign_toolkit__c	Doctype	3/26/2020 8:14 AM EDT
Component	component__c	Doctype	3/26/2020 8:13 AM EDT
Global Content Type	global_content_type__v	Picklist	2/11/2020 6:10 AM EST
Material	material__c	Doctype	2/28/2020 8:50 PM EST

### Q: How to bulk update Global Content Type, Content Creation Cost and Content Creation Currency?

A: You can bulk update document through bulk action in the UI or through vault loader or an API. The important thing to note is:

1. If the documents you are updating have an inactive Global Content Type assigned to them (because they were set before 20R1 was released and used a GCT that is now inactive) then you will need to update the Global Content Type to an active picklist value as part of the update.
2. Make sure to update both Content Creation Currency AND Content Creation Cost field together. Currency is the parent of the Cost field, so it is important that when updating these fields be sure to use the parent and child values so that no errors occur. For example, if you chose to update Currency to USD, be sure to select a cost value that is a child of USD, so if you wanted to select Decline to Provide it must be the USD Decline to Provide.

### Q. I am trying to bulk update many documents using vault loader, but it keeps failing as I get the error saying my Global Content Type doesn't contain the picklist that is already assigned to the document. e.g.

```
errors  
Invalid value [meetingMaterials] specified for parameter [global_content_type__v] : Picklist [global_content_type__v] does not contain [meetingMaterials]. Invalid value [meetingM
```

A: This is because the documents in question must have been given a Global Content Value before 20R1 was released and now that Global Content Type value is INACTIVE since 20R1 (for example Global Content Type 'Multichannel'). To fix this you need to provide an active Global Content Type value e.g. 'Other'.

### Q: Does Standard Metrics track metrics per steady state version?

A: Yes. The 6 autogenerated fields will populate per steady state version, so there will be a set of metrics for v1.0, and a different set of metrics for v2.0. When a document moves from v1.0 to v1.1 the 6 auto generated fields will be blank and will calculate when the document goes into the In Review system state and then the Steady State system state for that major version. If the document doesn't move into the In-Review system state, then 4 of the 6 autogenerated fields will remain blank. You may need to adjust your re-approval workflow to include a state change to the system state In Review to allow for the 4/6 autogenerated fields to calculate. You can see the different standard metrics calculation per major version by looking at the document in its previous version using version history in the action toggle.