

veeva

Global Content Types & Currency Mapping

Vault PromoMats Standard Metrics



What is the Best Process to Evaluate and Map Global Content Types to Document Types in my Vault?

1

Work with your CSM or MS Consultant to run the Standard Metrics Mapping Assistant Tool to provide a baseline recommendation for how to map your document types to the Standard Metrics Global Content Type

2

Evaluate the output and make the decision on how you would like to map your document types to the Standard Metric Global Content Type

3

Map each Document Type and Subtype in the Document Type Configuration Section



How do I Map My Global Content Type & Currency?

Map Document Types

- Customers can map Global Content Types in *ADMIN > Configuration > Document Type*
- If a customer maps the GCT before 20R1 there will be an exercise to re-map fields made inactive

Edit Details: Training material (Subtype)

Available Lifecycles* (Inherited from Material)

Material

Rendition Types

Panoramic Thumbnail Custom Thumbnail Viewable Rendition Large Size Asset Unmodified Source Web Ready

Distribution Package Production Proof

Relationship Types

Components Original Source Related Documents PI Linked Documents Supporting Documents

Document Type Groups (Inherited from Material)

All Documents Materials

Global Content Type (Not inherited from parent. Remove override)

Training Materials

Binder Thumbnail Options

Inherit from "Base Document": Do Not Display Binder Thumbnails.

Display Binder Thumbnails

Do Not Display Binder Thumbnails

Attachments

Inherit from "Base Document": Allow attachments

Allow attachments

Cancel Save

Map Currency

- Customers can map their default content currency in *ADMIN > Settings > Application Settings*

Application Settings

Portal

Enable Portal

Compliance Package Generation

Allow Compliance Package Generation

PI Document Type Reference - FPI - Full Prescribing

Enforce Documents are in Steady State

DAM

Enable InDesign Auto Linking

Linked Documents

Allow creation of link annotations

Enable Create & Import Document Links

Bring forward Linked Document relationships to new versions

Allow users to view and navigate annotation links in View mode

Make a Copy

Enable Reason for Copy

Standard Metrics

Enable Standard Metrics

Default Content Creation Currency USD

Standard Metrics User Input Fields

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 Currency*	
Picklist	Abbreviation
European Euro	EUR
Japanese Yen	JPY
Pound Sterling	GBP
United States Dollar	USD
Decline to Provide	N/A

*New currencies for 20R2: CAD, Yuan, AUD, CHF

Content Creation Cost	
Picklist	Mid-point value for calcs.
0 to 1,000	500
1,001 to 10,000	5,000
10,001 to 50,000	30,000
50,001 to 100,000	75,000
100,001 to 250,000	175,000
250,001 to 500,000	375,000
500,001 to 1,000,000	750,000
Decline to Provide	0

Standard Document Types

Standard Document Types will be automatically mapped to a default Global Content Type, and Content Creation Cost and Content Creation Currency will default to “Decline to Provide”.

Standard Document Type	Global Content Type Attribute
Event Material	Event Material
InDesign Component	Component
Health Authority Form	Health Authority Forms / Compliance Package
Compliance Package	Health Authority Forms / Compliance Package
Multichannel Presentation	Other
Multichannel Slide	Other
Email Template	Other
Email Fragment	Other
Master Email Fragment	Other
Template Fragment	Other



Global Content Type Modifications

In 20R1 release the following changes were made to Global Content Types

These values became INACTIVE

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

These values were added as new ACTIVE values

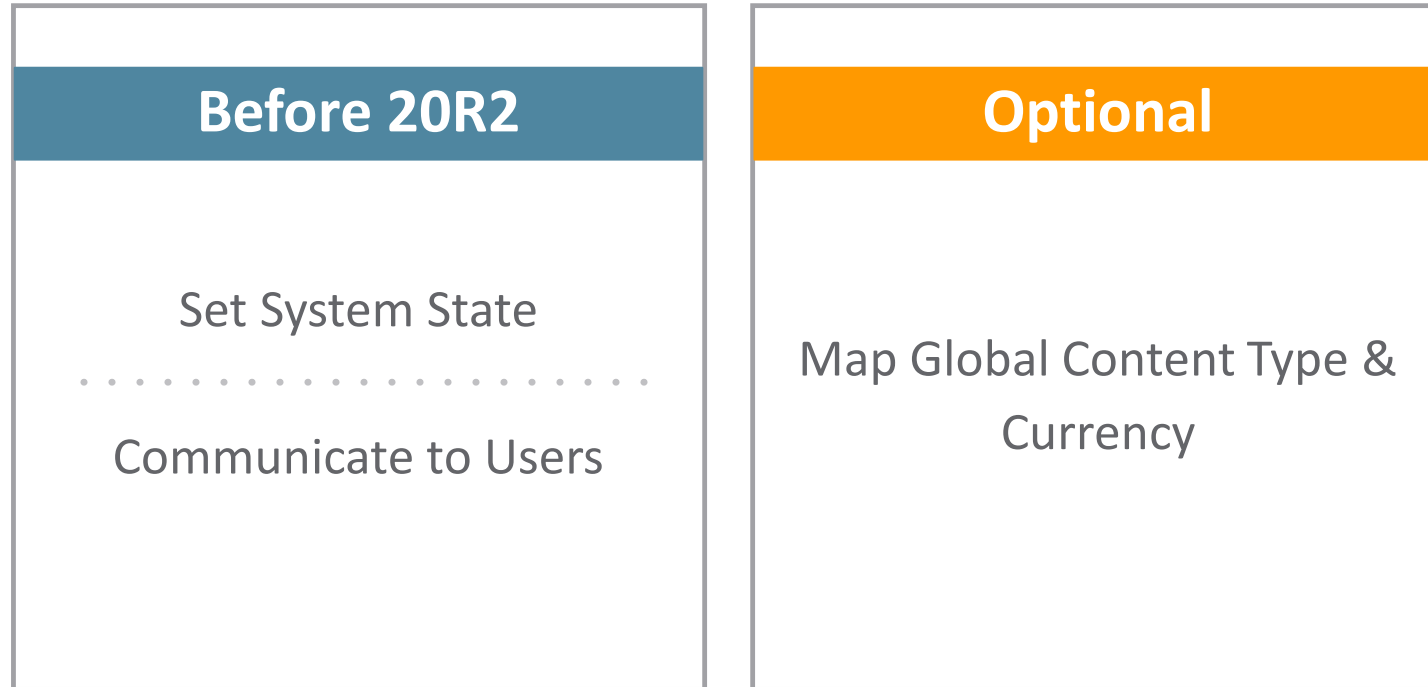
- Social
- Paid Search
- Web Banner
- Mobile Apps
- Component
- Event Materials

- ★ Any document types mapped to the inactive values will need to be remapped
- ★ Any documents containing any of these inactive global content types will need to be updated to avoid errors when editing documents

Reach out to Services or CSM for support on this



Suggested Actions Summary





Thank you