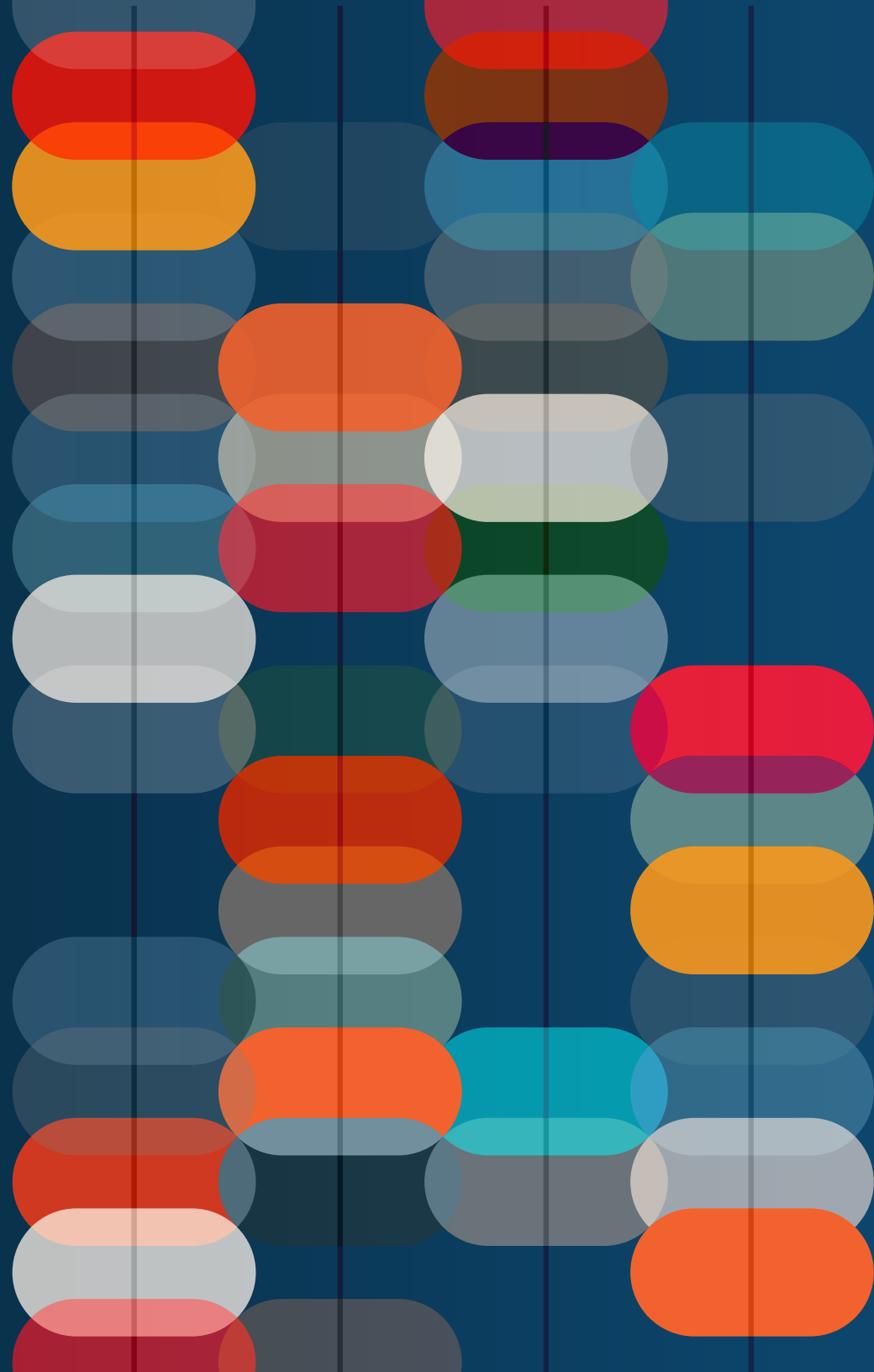


INNOVATION GUIDE

Veeva Vault PromoMats

# Latest Innovations

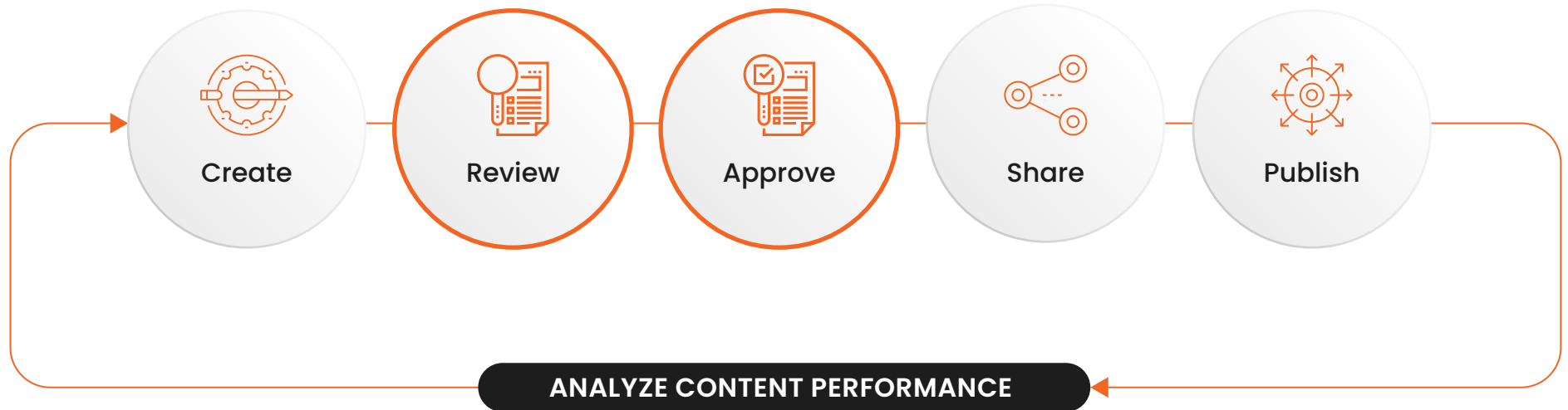


# Overview

Content is vital in life sciences marketing. Done well, it builds trust in your brand, informs customers about cutting-edge science and technology, and showcases your organization to the right audiences. As a result, content volumes keep rising, meaning content teams have more to create, approve, maintain, and catalog – all while delivering metrics on asset usage and audience reception.

Veeva Vault PromoMats is the compliant, centralized, and connected solution to manage this rapid rise in content volume. Innovations in Vault PromoMats strive to set the industry standard for biopharma content strategy and support commercial content creation, MLR, claims, and management.

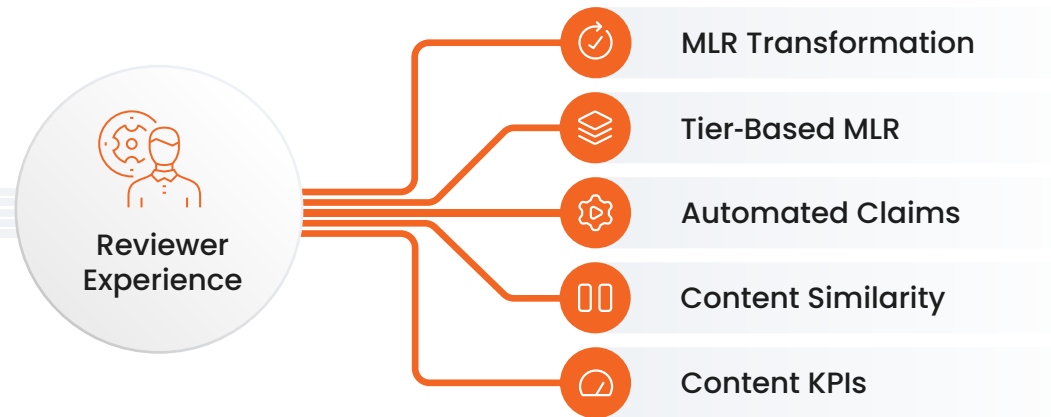
Read on for highlights from more than 40 new Vault PromoMats innovations released in 2024 – all designed to help you build and maintain a compliant content foundation in 2025 and beyond.



# Review and Approve

## Medical, legal, and regulatory review

Fast, compliant review is core to life sciences commercial content, and innovations in Vault PromoMats continue to enhance the reviewer experience.



Updates to MLR in 2024 provide efficiency and automation, speed, and enhanced metrics tracking to keep your content timelines on track.

### Minimize manual tasks by automating steps in your Workflows

You can use **Formulas** anywhere in Workflow where you can define “conditions.”

- | Use a Formula for the “Create” event action to determine which Workflow to start.
- | Use a Formula in decision steps to determine next steps in the Workflow.
- | Use Formulas for Entry Criteria conditions, what should be validated, and customer validation messages.

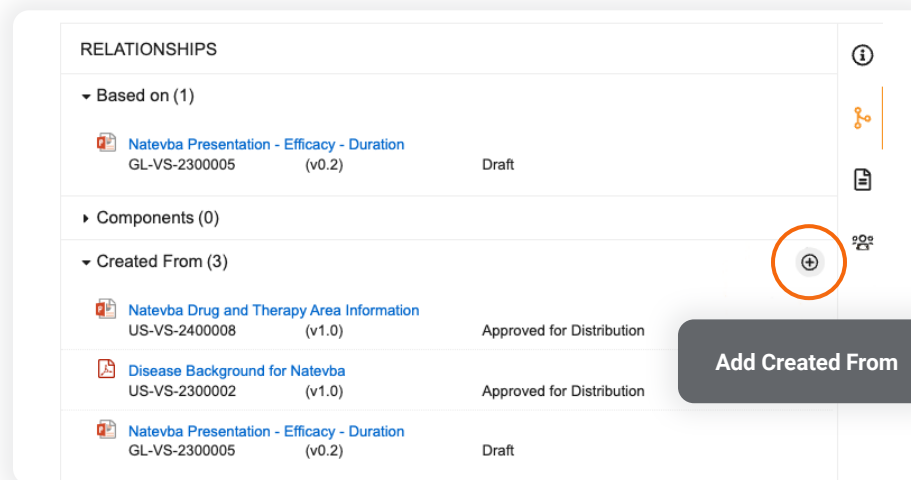
Watch this **demo** to learn how to use Formulas to automate your Workflows.

#### QUICK TIP

Formulas and automated Workflows can help support Tier-Based MLR review for faster, more efficient processes.

## Simplify review by easily seeing document relationships

Reusing content is a significant cost-saver for biopharmas, and it's easier on the reviewer when content stems from already approved content. The **Created From Document Relationship** feature captures and flags derivative content for reviewers when a user creates a copy of a document. This is similar to the existing Based On relationship type, but with added benefit: users can apply additional documents to the Created From relationship through authoring tools integrated with PromoMats or manually through the user interface after a user creates the document.



## Track and measure content lifecycle with more specificity

Streamlining your MLR process and identifying internal bottlenecks increases speed to market and improves content personalization. Updates to **Process Reporting and Cycle Time Calculations** will allow you to more easily understand how long it takes to perform specific aspects of the review process, when a certain state change happens, and where there are potential bottlenecks. Content teams can use these metrics to improve the overall business process and the team's performance.

To enable this, check out the **new functions** that are supported in report formula fields for object reports.

# Create Compliant Content Backed by a Central Claims Library

## QUICK TIP

Users can automatically approve Claims upon creation if the document they are harvested from is approved.

## QUICK TIP

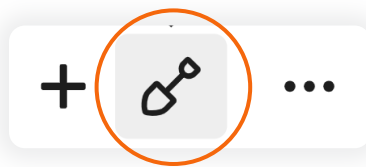
Users no longer need to manually trigger the Auto-Linking action. With **Auto-Link on Initial Upload**, Vault will automatically link and suggest Text Assets when a user uploads the first version of a document to Vault or makes a copy.

## Claims

A central claims library allows you to automatically and compliantly annotate claims and references on materials. Innovations in claims optimize MLR workflows and ultimately save time and resources.

### Harvest claims with a few clicks

Building a claims library is a historically manual and tedious process, from creating individual claims to claims approvals. Streamline the claims management process with automated **Claims Harvesting**, which turns Linked Reference Annotations into new claim records automatically.



Claims Harvesting can be configured to run automatically upon upload and extract link annotations from documents to populate the claims library. Or, users can click the shovel icon directly from the user interface to initiate the harvesting process.

### Reduce manual work and ensure consistency

PromoMats now provides an automated process for updating claims when reference documents are updated.

Previously, when the reference document of an anchor was up-versioned, claims supported by the reference needed to be manually updated or moved out of steady state. Now, with **Auto-Update Reference Anchors for Text Assets**, Vault updates claim records with the latest document version of unchanged text anchors that are brought forward on reference documents. You'll still be able to review the prior version history of the reference materials on the claim record.

### Experience better text detection from images

Image files are heavily utilized in promotional material uploads, but previous Optical Character Recognition (OCR) capabilities were primarily optimized for scanning PDFs. Now, **improved OCR** for images results in more recognized text, and will ensure a more consistent, accurate experience for users leveraging features like search, annotation, and Auto-Linking.

## Store, Search, and Share

## Digital Asset Management

Vault PromoMats DAM provides a single solution to store, search, and share compliant content. Built for life sciences, it drives **content reuse and cost savings**.

### Support content reuse with AI

Improve asset searchability with automatic tagging of images in your content. Upon upload, Vault will run **Automated Image Tagging** and apply contextual tags to your images from your curated list of tags, providing users with valuable data to help with searching for assets.

The screenshot displays the Vault PromoMats DAM interface. At the top, there are three tabs: 'Pre-Approval', 'Librarian Review', and 'Available for Use'. The main area shows a large image of a smiling couple in a park. To the right, the 'INFORMATION' panel is visible, showing various metadata fields. The 'Image Tags' field is circled in orange, and a callout box points to it with the text: 'Automated Image Tagging populates document metadata fields.'

Field	Value
Name	shutterstock_586587551.jpg
Description	demofavs
Tags	
Document Number	ASSET-21000188
Version	1.0
Status	Approved for Use
Country	
Product	<a href="#">Natevba</a>
Lifecycle	Component
Type	Component
Subtype	Images
Classification	Photos
	<a href="#">Reclassify</a>
Batch Number	
Language	English
Created By	Candace Zetter on 24 Sep 2021 2:14 PM EDT
Last Modified By	System on 19 Nov 2024 12:01 AM EST
Copy Depth	
Image Tags	<a href="#">Adult</a> <a href="#">Adults</a> <a href="#">Beard</a> <a href="#">Face</a> <a href="#">Female</a> <a href="#">Happy</a> <a href="#">Head</a> <a href="#">Laughing</a> <a href="#">Male</a> <a href="#">Man</a> <a href="#">Mustache</a> <a href="#">Smile</a> <a href="#">Smiling</a> <a href="#">Woman</a>

## Elevate Your Content Creation Strategy

### QUICK TIP

With **Combinations for Content Modules**, users can now easily group assets within a Module for specific channels, messaging, or personas. Try it with CRM Email Builder.

### QUICK TIP

For additional ease-of-review, reviewers can now comment on Content Modules directly from the Modular Content tab.

## Organize and streamline brand content

Promote key content within Brand Portal, the “storefront” for your brand.

- | Quickly **find more information on documents** on the Portals homepage, like file formats and document type or classification, without having to hover over a document card.
- | The security requirements process for **adding documents to the Portal** has been simplified. Now, when users add content to a Widget, they do not require the “Edit Field” permission on the document to complete the action, and the action is completed by Vault on the user’s behalf.
- | **Portals Tab visibility** is now based solely on user permissions, meaning users with permissions can still see the tab even when no Portals exist. Previously, if users had access to the Portals Tab but no Portals existed, the tab was hidden.

## Modular Content

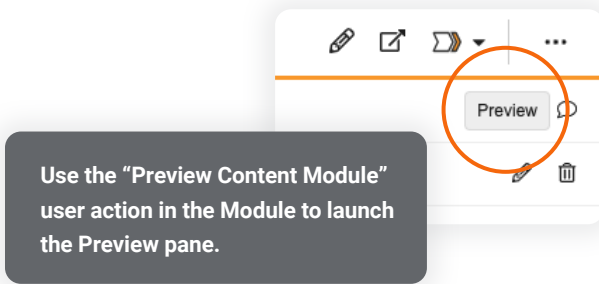
**Modular Content** within Vault PromoMats supports a more streamlined end-to-end content experience – from creation, to review and approval, to in-market execution.

### Enable reps to create personalized emails with pre-approved Modules

Vault PromoMats now supports the “CRM Email” module type and will host the pre-approved email assets that reps can use to construct personalized emails in the **CRM Email Builder**.

### Preview Modules against layout templates

**Modular Content Previews** simplify the review process by demonstrating to reviewers how the Content Module would appear within a piece of content.



Option to view different Combinations of Assets

Browse up to 20 previews of the Content Module.

Details of the assets from the Content Module

Preview of the Content Module

## Connect and Standardize

## Commercial Content Kernel

As life sciences companies continue to introduce new data and software into their organizations, different names and formats are often used to describe the same information. This is especially true of commercial content: the industry maintains more than 300,000 types, yet the historic absence of a standardized taxonomy means there is no common language to classify content across regions.

Veeva's **Commercial Content Kernel** simplifies and accelerates the process by providing a content hierarchy, classification, and description for organizing and delivering quality content across Vaults, the enterprise, and the industry.



Veeva champions **industry-wide adoption** of the taxonomy. Individual Vaults can implement this change via the Document Type and Document Subtype attributes. However, it's important first to assess your current taxonomy in PromoMats. Reach out to your Veeva Account Partner to get started.

## Vault Connections

### Forge new connections from clinical to commercial

Seamlessly connect marketing and medical content ecosystems with the **PromoMats-Medical Connection**.

#### BIDIRECTIONAL CONNECTION



Create and manage your reference libraries centrally in Vault Medical. The Connection transfers reference materials automatically into PromoMats to reduce manual work and eliminate out-of-sync references.



Synchronize your labeling documents by allowing Vault PromoMats to send this content to Vault Medical.

Learn more tips and tricks to make the most of Vault PromoMats in the **Vault PromoMats community on Veeva Connect**.



The **RIM-PromoMats Product Data Transfer** marks a key step on the journey to data standardization across Vaults. The RIM-PromoMats Connection currently supports the transfer of eCTD submission materials and approved labels between Vaults. The Data Transfer will further those capabilities by facilitating the creation of materials at the global level, given the easier flow of data from Vault to Vault. As commercialization progresses, Vault will transfer product hierarchy and registration data from Vault RIM to Vault PromoMats, and brand data from PromoMats to Medical. With several new objects in Vault PromoMats – and updates to existing product objects – you can now map data from Vault RIM through Vault PromoMats, and eventually through Vault CRM.

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