# Before Allocation Meeting

## Learning Objectives

After completing this unit, you'll be able to:

- Identify the fields in the MAI and the Opportunity D&D that should be filled in (SGD PMO)
- Creating and giving access to the PSG Document (Portfolio Manager)
- Updating the PSG Document for the evaluation request (Portfolio Manager)

## Introduction

Once the Allocation Meeting Agenda Item has been created and linked to an Allocation meeting, the SGD PMO needs to propose the evaluation function on the Meeting Agenda Item and make sure the relevant information is filled on the Opportunity D&D record.

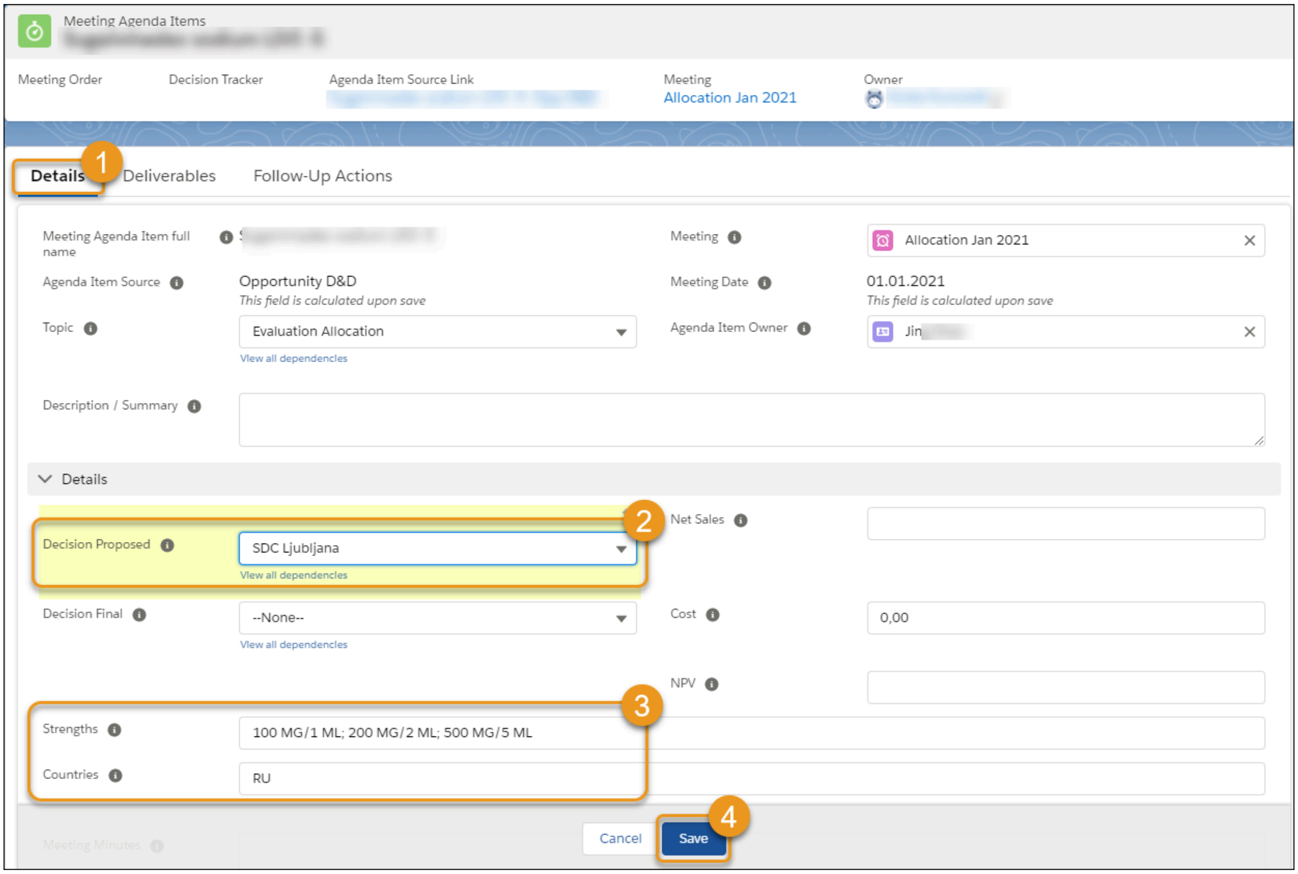
The Portfolio Manager needs to create and update the PSG Quip document with relevant information related to the Evaluation Request.

Let's dive into each one of these steps.

## Propose evaluation function on MAI (SGD PMO)

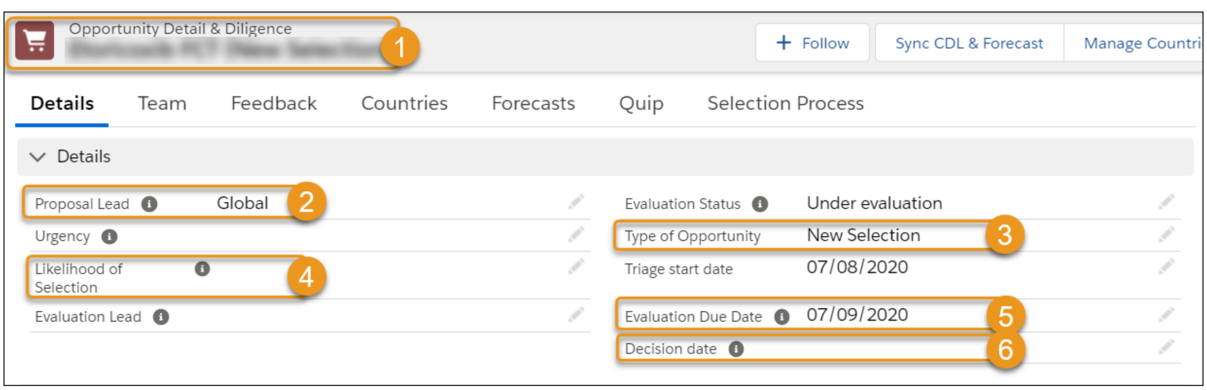
Add the proposed function responsible for the evaluation:

1. On the Meeting Agenda Item record, on the **"Details"** tab
2. Under **"Decision Proposed"** add the proposed function responsible for the evaluation
3. Check the required inputs (**"Strength"**/**"Countries"**)
4. Press "**Save**"




Check that relevant information has been filled in.

On the **"Opportunity D&D record"(1)** the SGD PMO will also check that the **"Proposal Lead" (2)**, **"Type of Opportunity"(3)**, **"Likelihood of Selection" (4)**, **"Evaluation Due Date"(5)** and **"Decision date" (6)** fields are filled in.




If any of this information is either missing or not as expected, you will go to the respective Portfolio Manager and ask for the necessary updates.

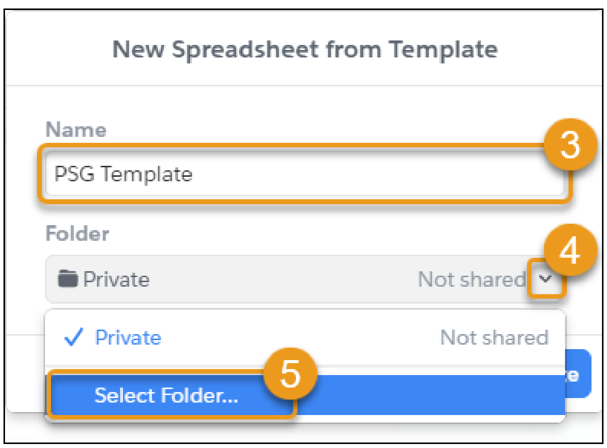
# The PSG Document to hold the evaluation information

## Create the PSG Quip Document from the template (Portfolio Manager)

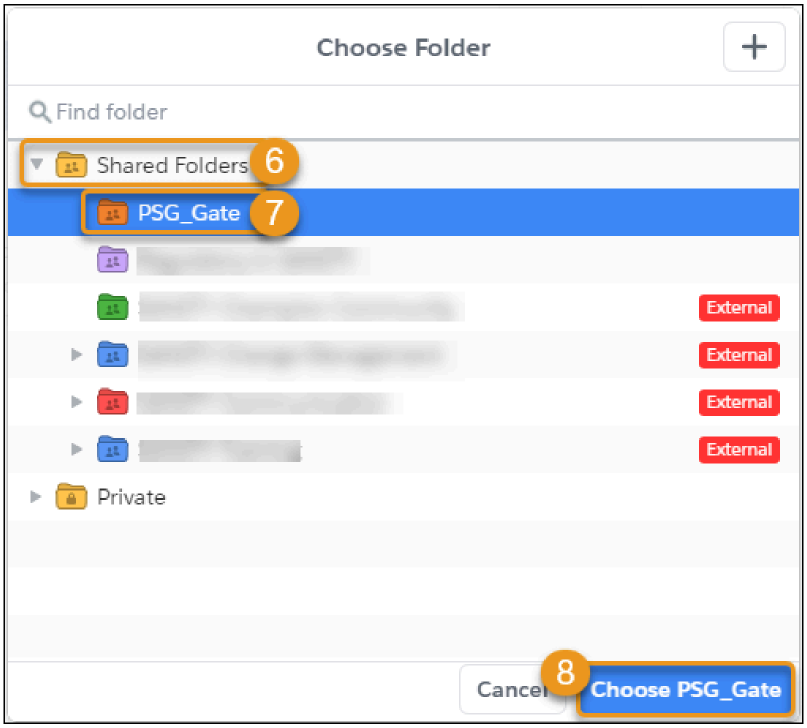
Until the data in the Product Strategy Gate information will be fully maintained in SANITY, some steps need to be done manually to link the PSG Document to the Opp D&D record and allow the team to include their data.

On the "Quip" tab of the Opp D&D record, the Portfolio Manager needs to add the Product Strategy Document for a new evaluation, by following these steps:

1. Login to Quip (https://quip.com/-/login/salesforce?prompt=login)
2. Click on this link Template PSG File (https://novartis.quip.com/jD3dA9YiIfSF/PSG-Template?template=1) and the **"New Spreadsheet from Template"** window will open.
3. Rename the file: change the name and follow the convention: "INN DF PT# PSG" for every evaluation
   (DF = respective dosage form) (In case there is already a file with this name (check first if this doc could be used  e.g. in case of SCE) or create a new doc with the name "INN DF PT# _v1 PSG")
4. On the "Folder" field click the **down arrow**
5. Click on "**Select Folder**"




6. Click on "**Shared Folders**"
7. Select "**PSG _Gate**"
8. Click "**Choose PSG_Gate**"




By placing the PSG Document in the “PSG_Gate” folder, you give writing access to everyone this folder is shared with. So it will be shared with all Portfolio Managers, SGD PMOs, and all PD PMs.

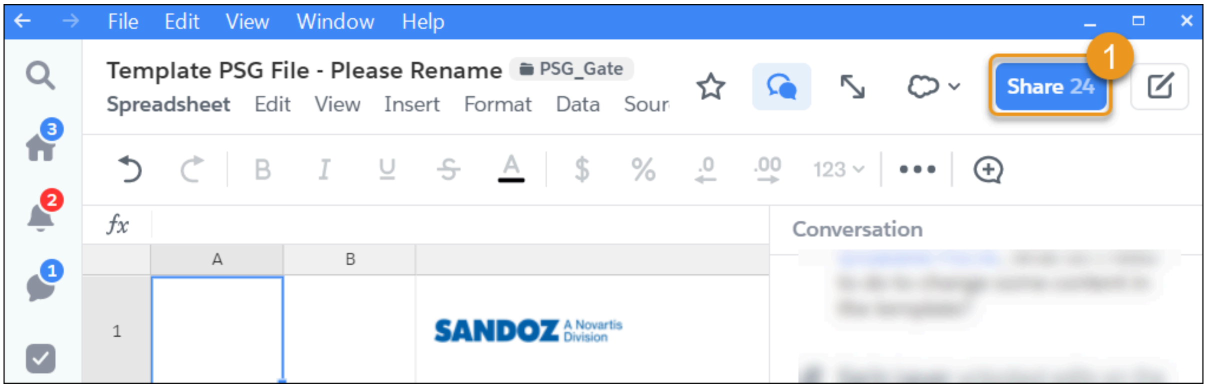
## Give access to the PSG Quip Document (Portfolio Manager)

On the PSG Quip Document, you have just created, you need to give writing and reading access to the relevant people.

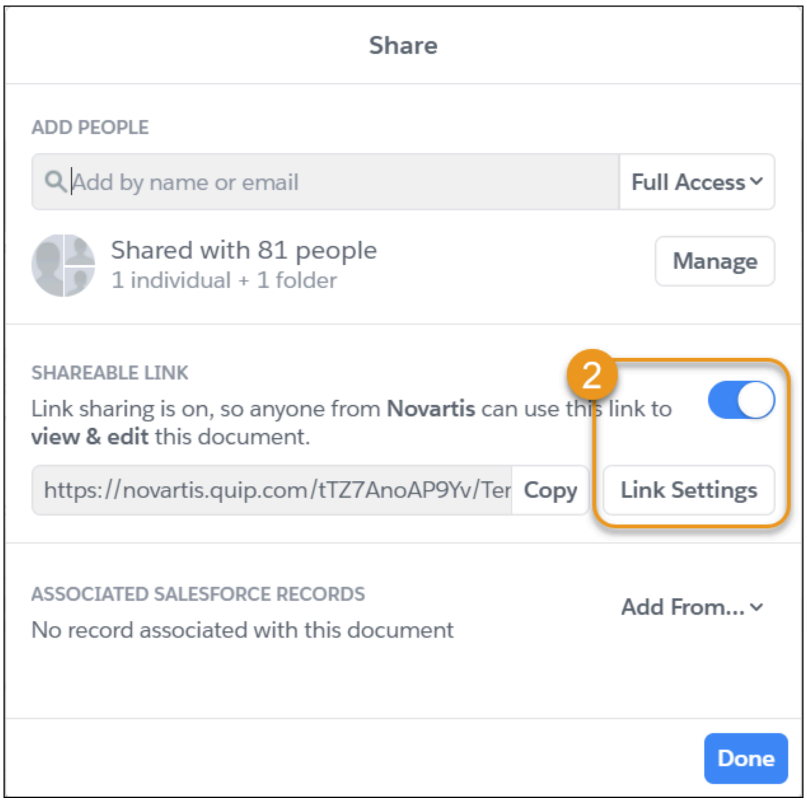
As mentioned above, by placing the PSG Quip Document in the “PSG_Gate” folder (as you just did) you gave “Write access” to specific people.

To give “**Read access**” to everyone having access to the record, enable link sharing for the file, by following these steps:

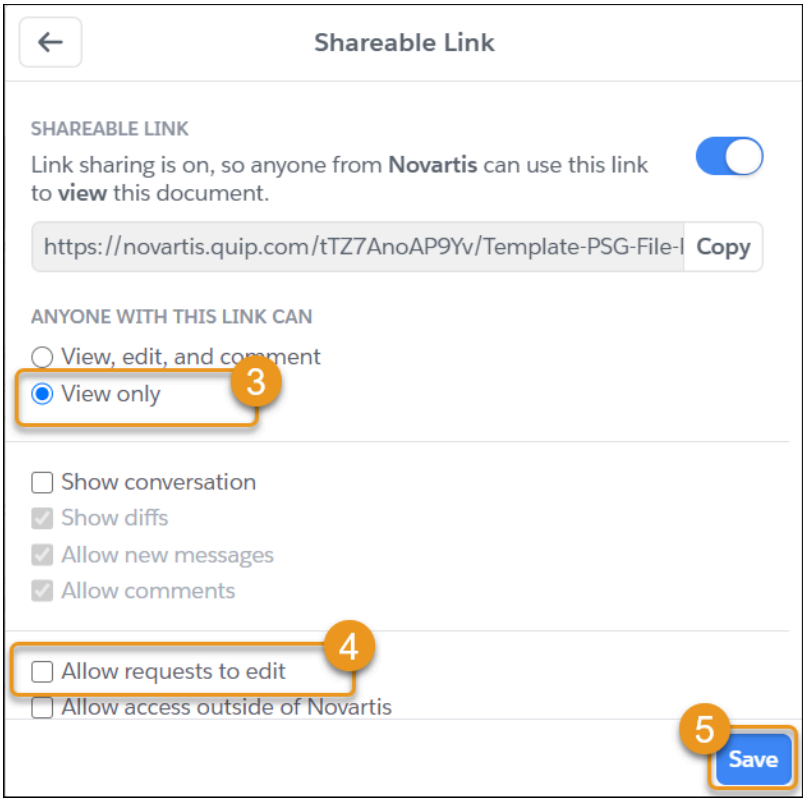
1. Click the “**Share**” button on the top right of the page




2. Toggle to the right to switch to the "**Shareable Link**" and click on "**Link Settings**"

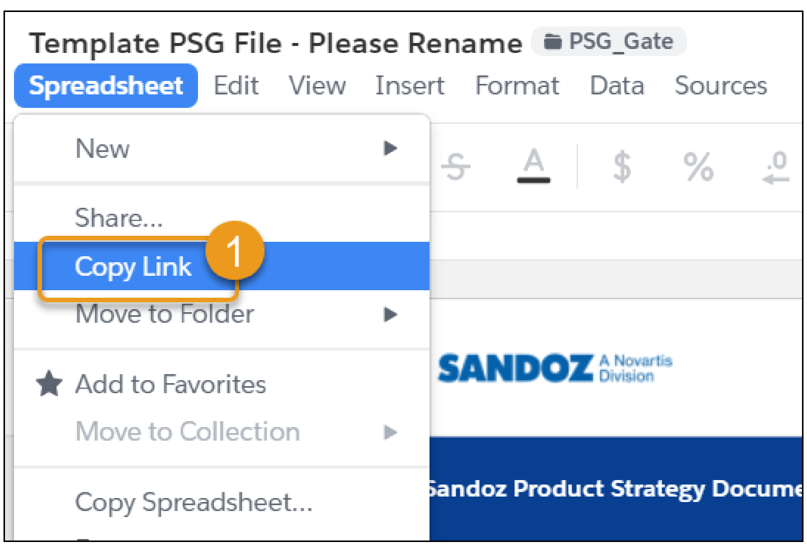



3. Choose the radio button with "**View only**"
4. Uncheck the box "**Allow requests to edit**"
5. Click "**Save**"

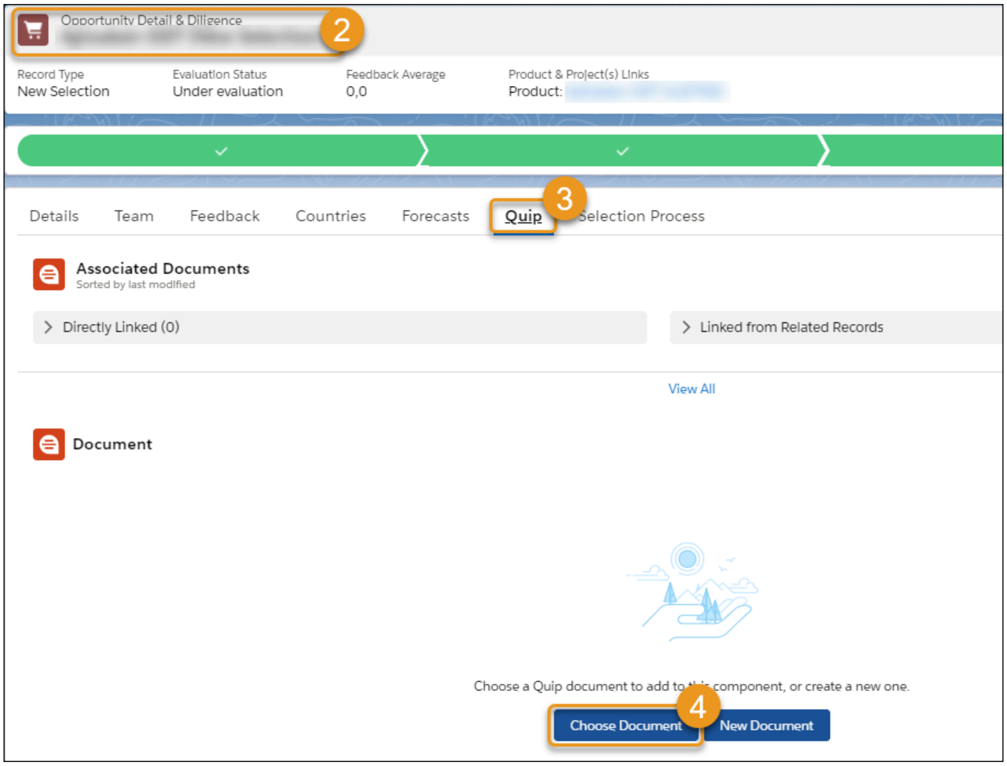



# Link the PSG Document to the Opportunity D&D record in SANITY (Portfolio Manager)

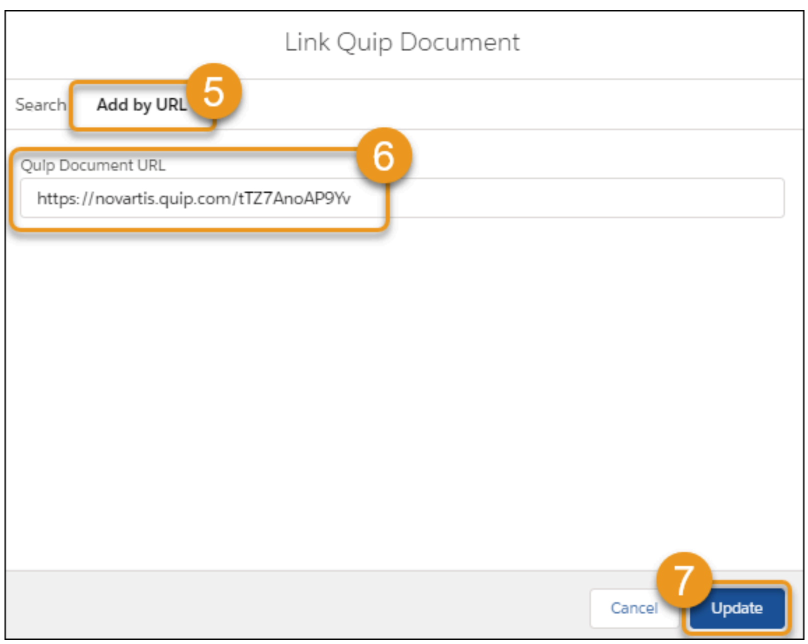
1. Copy the URL of the Quip PSG Document, by clicking "**Copy Link**" under the "**Spreadsheet**" menu



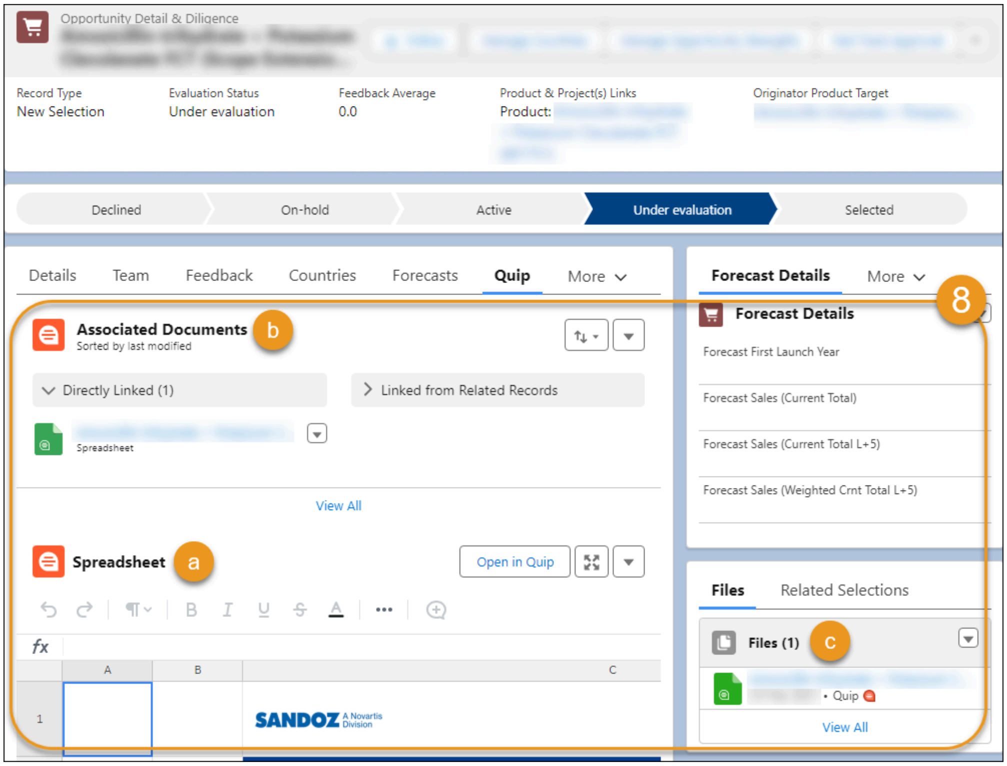

2. Navigate back to the **Opp D&D** record
3. Click on the "**Quip**" page
4. Under "**Documents**" click "**Choose document**"




5. Under "**Add by URL**"
6. Paste the copied URL
7. Click "**Update**"




8. You will see it in the **"Spreadsheet"** section **(8.a)**, a link to it in the "**Associated Documents**" section **(8.b)** as well as in the "**Files**" section **(8.c)**




The file will now be visible also on any Opportunity Assessment record linked from the Opp D&D. It can also be further shared for editing directly in Quip - that might be individual sharing to PD managers.

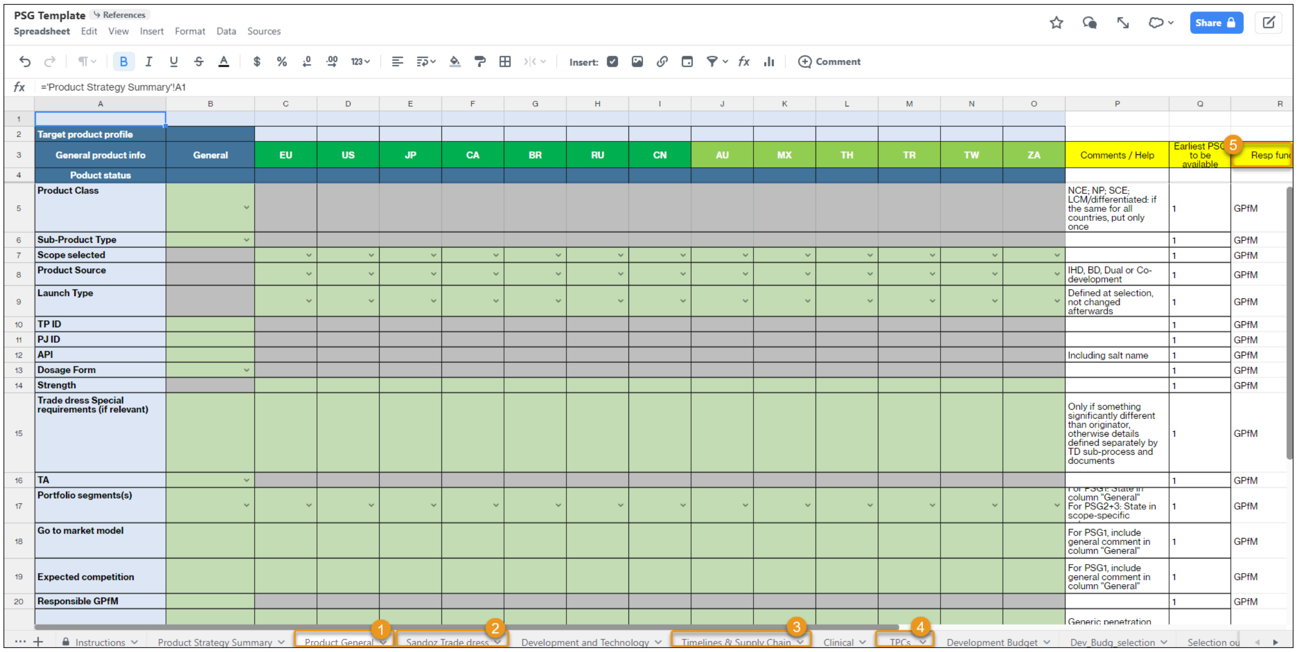
## Adding more information in the PSG Document for the Evaluation Request (Portfolio Manager)

Now, the Portfolio Manager will need to include the project-specific information in the PSG Document.

In general, all fields with "**Portfolio**" in the "**Resp function**" column **(5)** on the right side of the Quip doc, should be completed.

You will find information to complete on the following tabs:

1. "**Product General**"
2. "**Sandoz Trade dress**"
3. "**Timelines  Supply Chain**"
4. "**TPC**"




In case the target TPC or forecast volumes are not known yet, please include them during the evaluation on availability before finalization of the evaluation.