Preparing and Allocating the Evaluation Request (API Sourcing/Portfolio)

Learning Objectives

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

- know where to find key information of the evaluation request

Introduction

Once the Evaluation Request has been assigned to you in the Allocation Meeting, you can check the following information in SANITY:

- Opportunity Assessment record
- PSG Quip document
- Meeting Agenda Item (MAI) record

When an Opportunity Assessment (Evaluation Request) is assigned to you, you will receive a notification email with a link to the assessment record. You will learn more about this in the next unit.

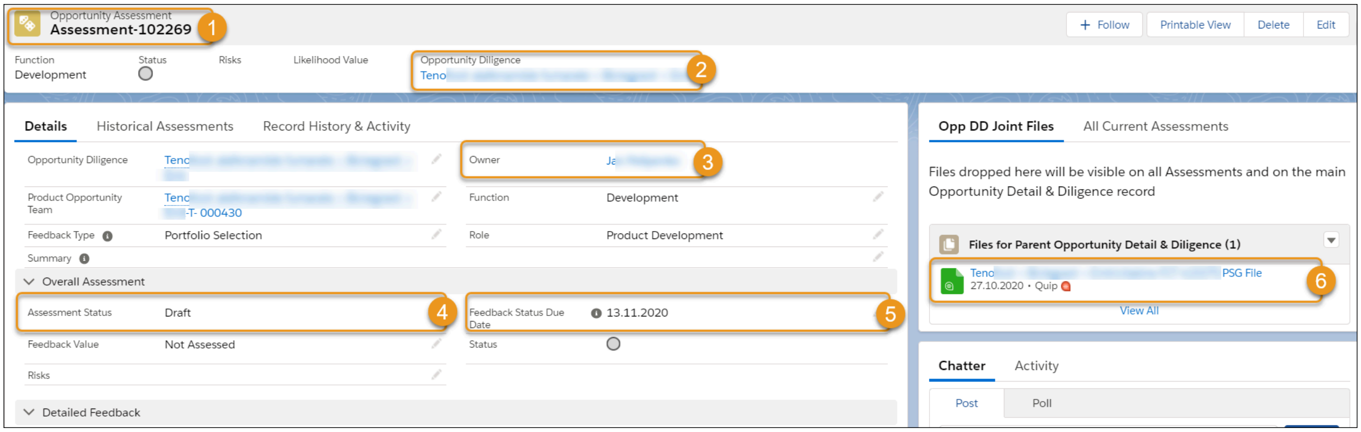
Let's dive into each one of these topics.

Information Found on the Opportunity Assessment record

So, you have received a notification email that an evaluation request has been assigned to you, and you have clicked on the link provided, opening the opportunity assessment record.

On the **Opportunity Assessment record (1)** you will find the following relevant information:

- **Link** to the respective **Opportunity D&D (2)**
- "**Owner**" **(3)**, which should show your name
- "**Assessment Status**" **(4)** set on "**Draft**", this needs to be changed to "Final" when the assessment is finalized by you and your team
- "**Feedback Status Due Date**" **(5)**, the date you should provide the product strategy at the latest
- **Link** to the **PSG document (6).**



Product Strategy Gate (PSG) Document

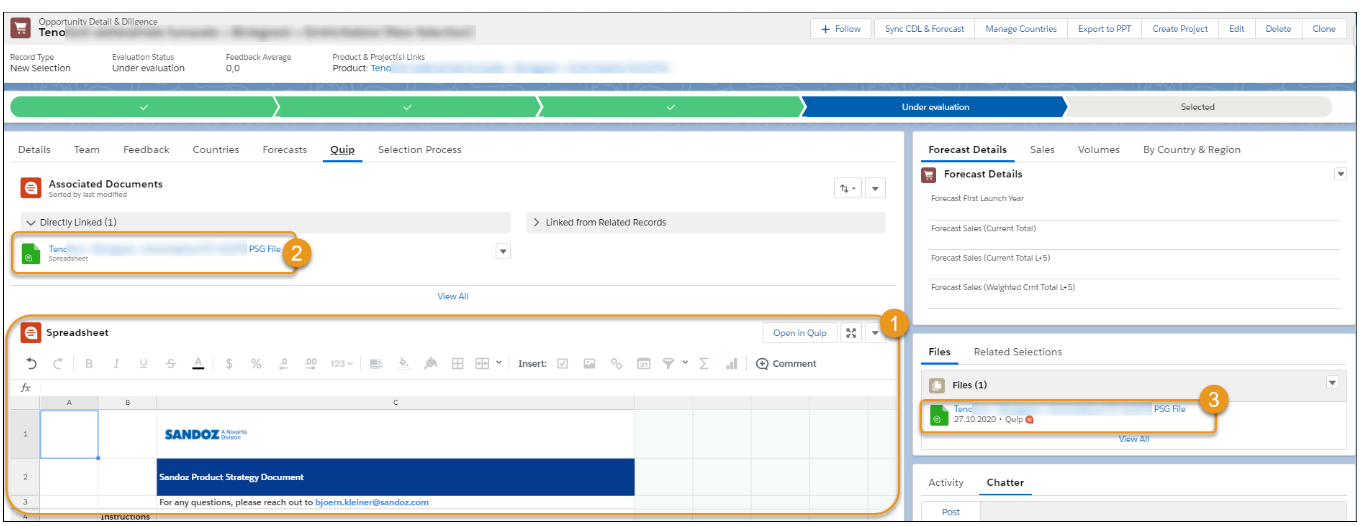
Until the data in the Product Strategy Gate Document will be fully maintained in SANITY, the PSG Document of the Opportunity D&D will allow the team to include their data.

The PSG document, prefilled by the Portfolio Managers, will be, most of the time, added as a Quip file under the tab “Quip” on the Opportunity D&D record.

In special cases, it will be handled as an excel file outside of the system and should be uploaded afterward as a file.

As you have seen in the previous section, you can access the PSG Document directly from the Opportunity Assessment record by clicking on the link provided.

It can also be found on the Opportunity D&D on the “Spreadsheet” section **(1)**, a link to it in the “Associated Documents” section **(2)** as well as in the “Files” section **(3).**



The PSG file is visible on the Opportunity D&D and any Opportunity

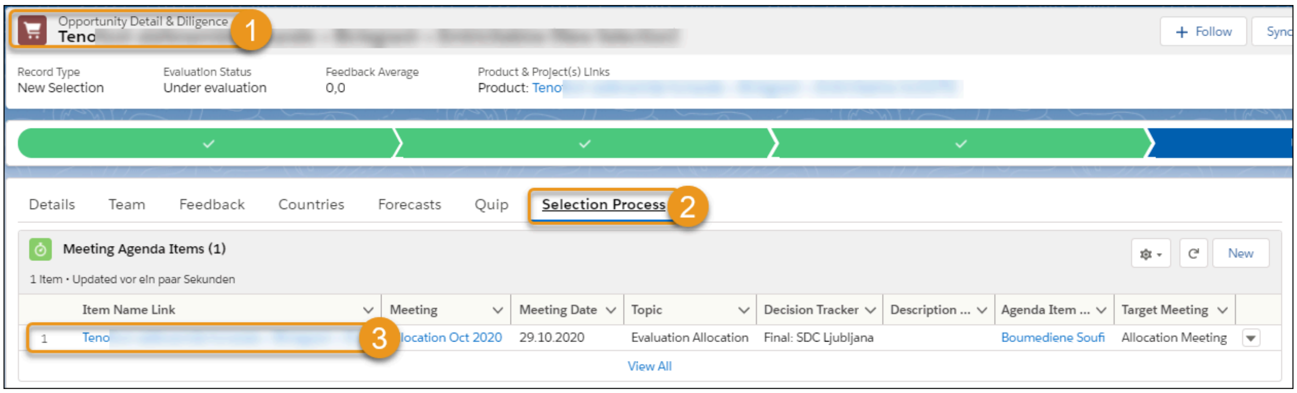
Assessment record linked to the Opportunity D&D.

Information found on the Meeting Agenda Item (MAI) record

You can access the MAI record from the related Opportunity D&D record.

On the header of the Opportunity Assessment record you can find the link to the Opp D&D, just click on it, and the record will open.

1. On the Opportunity D&D
2. Click on the tab "Selection Process"
3. You will find the Meeting Agenda Item for the allocation meeting, click on it



4. the MAI record for the allocation meeting opens, here you can find the following information:
   a. Meeting
   b. Decision Proposed
   c. Decision Final
   d. Strengths
   e. Countries