

# 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)**.

Opportunity Assessment  
Assessment-102269

Function Development Status Risks Likelihood Value Opportunity Diligence Teno

Details Historical Assessments Record History & Activity

Opportunity Diligence Teno Owner Je

Product Opportunity Team Teno-T: 000430 Function Development

Feedback Type Portfolio Selection Role Product Development

Summary

Overall Assessment

Assessment Status Draft Feedback Status Due Date 13.11.2020

Feedback Value Not Assessed Status

Risks

Detailed Feedback

Opp DD Joint Files All Current Assessments

Files dropped here will be visible on all Assessments and on the main Opportunity Detail & Diligence record

Files for Parent Opportunity Detail & Diligence (1)

Teno 27.10.2020 - Quip PSG File

Chatter Activity

Post Poll

## 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).

Opportunity Detail & Diligence  
Teno

Record Type New Selection Evaluation Status Under evaluation Feedback Average 0.0 Product & Project's Links Product: Teno

Under evaluation Selected

Details Team Feedback Countries Forecasts Quip Selection Process

Associated Documents Sorted by last modified

Directly Linked (1) Linked from Related Records

Teno Spreadsheet PSG File

Spreadsheet

Open in Quip

SANDOZ

Sandoz Product Strategy Document

For any questions, please reach out to bjoern.kleiner@sandoz.com

Forecast Details Sales Volumes By Country & Region

Forecast Details

Forecast First Launch Year

Forecast Sales (Current Total)

Forecast Sales (Current Total x5)

Forecast Sales (Weighted Cmt Total x5)

Files Related Selections

Files (1)

Teno 27.10.2020 - Quip PSG File

Activity Chatter

Post



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

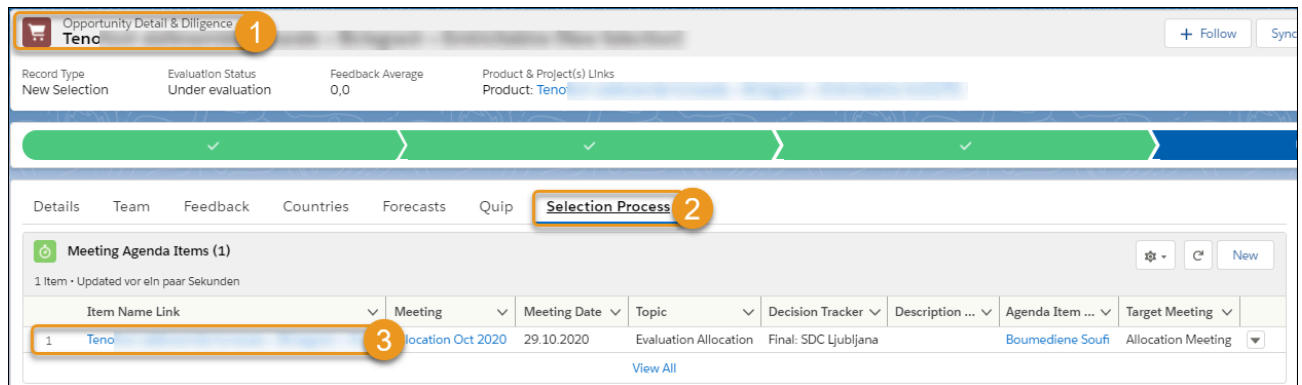
Assessment record linked to the Opportunity D&D.

## 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

