

How to Create a Portfolio Project

Learning Objectives

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

- Understand Portfolio Project creation in SANITY



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and Systems

What is a Portfolio Project

A Portfolio Project is the record owned by the Portfolio Manager who brought the product to Selection Decision - think of it as the Project Order where for example the scope and also the live value of the forecast are shown. The record is created after the Global Pipeline Committee (GPC) took the decision to go forward with a new product. In case of an scope extension to an existing project, starting from the Opp D&D, the Portfolio Project record would be updated to get the additional Country Detail Level (CDL) records linked.

The Portfolio Project record is the starting point for the creation of a BD Deal Process record in the case of a BD project and the Project & Launch Management record for both BD and In-house projects. It is also the starting point for creating a Regulatory Checklist.

Prior to creating a new Portfolio Project, a Portfolio Manager will need to go for a board decision for selection of the new project to be allocated. By navigating to the **"Selections & Escalations" tab(1)** on the 'Product Target' record, you will see which projects were allocated in the past and their status and class. The following picture shows an example of a Product Target with five **"Portfolio Projects"** (2) already associated.



It is important to remember that when you need a new Product Target or a Sandoz Product Target, **only the Global Governance, Process & Systems team** can create these records. You need to provide all the necessary information in an accurate manner to ensure the successful creation of these records.

Product Target
Alfacalcidol

Originator Company: Emra-Med Therapeutic Area: Alimentary Product Type: Small Molecule Strengths: 0.25 µg (MCG), 0.5 µg (MCG), 1 µg (MCG)

New Assessment Polymorph Screening Pre-Dev

Details Selections & Escalations 1 Patents & Reg Strengths & Sndz Targets Forecasts BD & Scouting Quip

Click "New" below to start a New Selection evaluation in the **Opportunity Detail and Diligence** object. This process eventually leads to a selection decision at GPC.

Opportunity Detail & ...	Decision M/Y	Type / Status / Lead	Country Selection Output	Selections	Monitor / ...	Owner Las...
1 Alfacalcidol	July 2022	New Selection / Selected / LCM	Europe(1) : DE	BD Project:		
2 Alfacalcidol	May 2022	New Selection / Selected / Local	NAmer (North America)(1) : CA	BD Project:		
3 Alfacalcidol	May 2022	New Selection / Selected / Regional	APAC (Asia Pacific)(1) : TH	BD Project:		

View All

Existing Portfolio Projects are linked below. SANITY processes have these created after a New Selection evaluation and can be viewed here. Only use "New" below if cleaning up old data.

Portfolio Projects (Product Target) 2

5 items • Updated a few seconds ago

Portfolio Project	Project Status	Product So...	Country Selection Output	Target Strengths	Product Cl...	Forecast Sales (Cu...	Owner Last ...
1 Alfacalcidol	Finished	BD&L	Europe(4) : SK, RO, DE, MD ; null(25)	1 µg (MCG): 0.25 µg (MCG); 0.5 µg (MCG)	Gx		
2 Alfacalcidol	Discontinued	BD&L		0.25 µg (MCG); 1 µg (MCG); 0.5 µg (MCG)	Gx		
3 Alfacalcidol	Active	BD&L	NAmer (North America)(1) : CA	1 µg (MCG): 0.25 µg (MCG)	Gx		
4 Alfacalcidol	Active	BD&L	APAC (Asia Pacific)(1) : TH	0.5 µg (MCG): 0.25 µg (MCG)	Innovative		
5 Alfacalcidol	Active	BD&L	Europe(1) : DE	0.5 µg (MCG); 1 µg (MCG); 0.25 µg (MCG)	Gx		

View All

Let's follow the steps of Helena from Global Portfolio Governance, Process and Systems as she creates the Portfolio Project record using the New Project Wizard from the Opp D&D. The specific permissions of Global Portfolio Governance, Process and Systems are necessary to do so.

One important condition to be met before you can use the Project Wizard to create the new record is that the Decision Date needs to be recorded.

Only once the GPC decision is recorded by the Portfolio Manager on the related Meeting Agenda Item, will the decision date also be set automatically on the OppD&D, and its status is moved to **"Selected"**.

More details on that process can be found here [How to Record your GPC selections: Opp D&D and Meeting Agenda Item | \(trailhead.com\)](#) (<https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0019rs>).

The screenshot shows the Opp D&D header with the following details:

- Opportunity Detail & Diligence
- Alfacalcidol
- + Follow
- Manage Countries
- Manage Opportunity Strengths
- Fast Track Approval
- New Project Wizard
- Sync CDL and F&A
- Change Owner
- Edit
- Delete

Below the header, there are sections for Record Type (New Selection), Evaluation Status (Selected), Feedback Average (0.0), Product & Project(s) Links (Product: Alfacalcidol), and Originator Product Target (Alfacalcidol).

A horizontal status bar at the bottom shows five states: Declined, On-hold, Active, Under evaluation, and Selected. The 'Selected' state is highlighted with a blue background and an orange border.

In addition, the following information needs to be maintained on the Opp D&D:

- Product Class
- Countries were 'managed', i.e., either put to be monitored or selected, and additional info such as the MS7 and MS8 dates should have been provided
- Strengths were 'managed' i.e., selected from the available strengths of the Product Target



The MAI record will be locked after 24 hours of the 'Decision Final' setting and Opp D&D record will be locked after 14 days of the 'Decision Final' setting. After this time, you will need elevated rights to make changes to the records.

How to create a Portfolio Project

With the pre-work all done, you are set to use the **"New Project Wizard"** button to create the Portfolio Project record and thereby link the selected CDL and Forecast records to it.

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As soon as the wizard is completed, you will be able to see a link to the corresponding project in the 'Opp D&D' header. The screenshot below shows the example of a **"BD Project"**.

The screenshot shows the Opp D&D header with the following details:

- Opportunity Detail & Diligence
- Alfacalcidol
- + Follow
- Manage Countries
- Manage Opportunity Strengths
- Fast Track Approval
- New Project Wizard
- Sync CDL

Below the header, there are sections for Record Type (New Selection), Evaluation Status (Selected), Feedback Average (0.0), Product & Project(s) Links (Product: Alfacalcidol), and Originator Product Target (Alfacalcidol).

A horizontal status bar at the bottom shows five states: Declined, On-hold, Active, Under evaluation, and Selected. The 'Selected' state is highlighted with a blue background and an orange border. A specific link labeled "BD Project: 422703 009295" is highlighted with an orange border.

Accessibility tag: Visual demonstration of BD Project Link on the Opportunity D&D tab. It's important that the responsible Portfolio Manager is set as the owner of the Portfolio Project. As long as the legacy system is still active in the back end, you will also need to link the project back to the SPIRIT Project record, mapped by the Project ID. This will populate the Project ID in the name as well as other fields, also on related records.

After the creation of a Portfolio Project, you can go ahead with the next step:

In the case of an internal (In-House) development project, the corresponding Project & Launch Management record can be created using the “**Create Project & Launch Mgmt**” button (1). The decision on which SDC is taking up the project is made in the Allocation Meeting, which is owned by PD PMO. The SDC leadership team nominates a Project Manager who will be set as the owner of the PLM record.

Currently, a member from the Global Governance, Process & Systems team clicks that button, but please keep in mind that the Allocation Meeting and related processes are still under development.

SDC information can be included now or at a later stage. In the latter case, the system will select ‘Sandoz Dev’ as a placeholder in the Partner/SDC field on the Project Opp D&D record.



Once that Opp D&D has been selected, the selection FCs are transferred to the Portfolio Project. Any update/change in FCs should be done in the Portfolio Project.

In the case of a license project, the project is allocated to the BD organization, and the BD Ops Manager will create the corresponding BD Deal record using the “**Create BD Deal**” button (2). Have a look at the [How to Create BD Deals by BD&L](#) (https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0070nm?trail_id=bd-licensing-process) module to learn more about the creation of BD Deal records.



For BD projects, the PLM record can only be created once the contract has been signed.

Let's congratulate Helena for successfully completing the process of creating a Portfolio Project with the New Project Wizard!

Now, the new Portfolio Project record will act as the initial step in creating either the BD Deal Process record or the Project & Launch Management record for both BD and In-house projects. It also marks the beginning of the process to develop a Regulatory Checklist. Overall, the Portfolio Project record plays a vital role in Project Management and serves as a central point for coordinating various aspects of the project's lifecycle.

Resources

[How to Record your GPC selections: Opp D&D and Meeting Agenda Item | \(trailhead.com\)](#)

<https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0019rs>

https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0070nm?trail_id=bd-licensing-process (https://sanity.my.trailhead.com/content/sanity/modules/szsanitym0070nm?trail_id=bd-licensing-process)

[How to Create BD Deals by BD&L](#)

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