

Create / Update Assumption based Forecasts in SANITY

Training handout for Forecast creation and update process

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Useful Documents

Introduction to the Assumption based forecasting methodology: [Assumption based forecasting Methodology introduction 20221025.pdf](#)

Excel model showing formulas used for conversion from Calendar year assumptions to 12 month rolling assumptions and vice versa: [20220928_Calendar year assumption modelling - CY and 12m averages - system view v9.xlsx](#)

Excel download - upload tool to create / update forecasts:
[SANITY_FC_Masterfile_wCalculation.xlsm](#)

For optimal visibility on SANITY screens, set the **Zoom** of your **browser** to **80%**.

What is an assumption based Forecast in Salesforce?

- Assumption based forecast is a forecast calculated based on Market volume and price development assumptions entered into SANITY – calculations are performed within the system
- Such forecast is created for each single combination of Channel, Strength and Pack size; one Country Detail Level (CDL) of a SANITY project can therefore have multiple forecast lines
 - E. g. if you are forecasting for 2 Channels, with 3 Strengths per channel and 2 Pack sizes per strength, SANITY will create $2 \times 3 \times 2 = 12$ forecast lines.
 - Aggregated forecast values are available on the CDL level.
- Assumptions that build the basis for the forecast calculation can be managed on multiple levels:
 - Channel level (copied from the Standard assumption catalog and adjusted as needed, or entered individually)
 - Single Channel-strength-pack size level (copied from Channel and adjusted as needed, or entered individually; Market volume, Market volume growth and Originator price at Launch can only be managed at this level)

Standard Assumption Catalog Management

What are standard assumptions and how can they be used?

What are standard assumptions and what assumptions can be stored in the catalog?

Standard market assumptions are assumptions that potentially apply to multiple projects that will get launched

- in the same country and channel
- into a similar market situation (e. g. regarding competition situation)
- for the same therapeutic area (optional).

Standard market assumptions are stored in SANITY in a way that they can be selected from and applied when forecasting on a project. Standard market assumptions are only available for 12-months rolling forecast methodology.

Standard assumptions include following metrics:

Metric	Explanation
GX Penetration	Average % of the total market volume that will belong to Generics at a given period of time
SDZ Market share (GX)	Average % of the generics market volume that will belong to Sandoz at a given period of time
GX gross price level Launch year	Average Generics gross price for the given time period, expressed as % of the Originator price at launch
GX gross price level other years	Generics price development in the given period of time, expressed as % change compared to the previous 12 months
Discount	Average SDZ gross to net discount for the given period of time
Originator price development	Average price development of the originator product post launch, expressed as % change compared to previous 12 months (for Yr 1 - compared to Launch date)

Standard assumptions are defined for launch year period (1st 12 months post launch) + max. 11 years (12 months periods), timelines defined as follows:

Time definition in SANITY	Meaning	Example based on Launch date 01.04.2022
Launch Yr	Launch date + 12 months	01.04.2022 - 31.03.2023
Yr 1	Months 13-24 after launch date	01.04.2023 - 31.03.2024
Yr 2	Months 25-36 after launch date	01.04.2024 - 31.03.2025
Yr 3	Months 37-48 after launch date	01.04.2025 - 31.03.2026
Yr 4	Months 49-60 after launch date	01.04.2026 - 31.03.2027
Yr 5	Months 61-72 after launch date	01.04.2027 - 31.03.2028
Etc.		

How can assumptions be used?

When you create bottom-up forecast in SANITY using the Assumption based Forecasting functionality, you can choose from the sets of assumptions stored in the catalog and defined for your country + sales channel + therapeutic area combination (therapeutic area is optional).

If you do this, metrics stored in the assumption catalog will be applied to your forecast.

Standard assumptions chosen for a specific forecast can be adjusted to the project / forecast specifics if required.

This will save you manual data management effort and simplify alignment / approval processes for your new forecasts (pre-defined assumptions do not need to be justified every time).

Do I have to use standard assumptions in my forecast?

It is advised to manage and update standard assumptions in a way that they can be used for as many projects and forecasts as possible. Using standard assumptions simplifies forecast creation and update process significantly, makes the justification behind your assumptions transparent and reduces manual work.

However, in certain special cases usage of standard assumptions does not make sense (i. e. a project is launched into a unique market situation). This is why SANITY allows you to forecast without using standard assumptions, and add individual assumptions on the forecast level from scratch.

Manage Standard Assumptions in your Country

Add all Channels to your Country

Channels should already be added when you start using Assumption based forecasting in SANITY. However, it is useful to understand how to add / manage Channels, in case additional channels come into play.

Go your Country record in SANITY and find the “Channels & Assumptions” tab (1).

Review the existing channels critically before clicking on “New” (2), to avoid duplicates!

The screenshot shows the SANITY interface for a 'Country Mexico' record. At the top, there are tabs for 'Country Pipeline', 'Study Mapping', 'CDL Records', and 'Country Info'. Below these is a chart titled 'Country Pipeline by Year' showing 'Sum of Forecast Net Sales (converted)' from 0M to 120M. On the right, there is a table titled 'Country Channels (3)' with three items: 1. Sandoz Hospital, 2. Sandoz Retail branded, and 3. Sandoz Retail Tender. Above the table are buttons for 'Open Fcst Requests', 'Edit', 'Change Owner', and 'Delete'. A 'Follow' button is also present. The 'Channels & Assumptions' tab is highlighted with a yellow circle labeled '1'. In the top right corner of the table area, there is a 'New' button highlighted with a yellow circle labeled '2'.

When creating a new channel, make sure the “Company”, “Distribution channel”, and “Tender” fields are filled (1).

- If you define a channel to forecast on the whole country (without differentiating by distribution channel or company), choose **Whole market** in the Distribution channel field.

Do not type anything in the “Country Channel Name” field (2) - it will be filled automatically based on your choices for Company, Distribution channel and Tender.

The screenshot shows the 'New Country Channel' dialog box. At the top, it says 'New Country Channel'. Below that is a section titled 'Information' with a note '*Country Channel Name' and a placeholder 'Calculated upon creation'. To the right of this is a 'Country' dropdown set to 'Mexico'. Next is an 'Owner' section showing 'Natalia Kuehnert' as the owner, with dropdowns for 'Company' (set to 'Sandoz'), 'Distribution channel' (set to '--None--'), and 'Tender' (set to '--None--'). At the bottom of the dialog are buttons for 'Cancel', 'Save & New', and 'Save'. A yellow circle labeled '2' is over the 'Country Channel Name' input field, and another yellow circle labeled '1' is over the 'Owner' section.

Add Standard Assumptions to your Channels

Standard assumptions are sales channel specific, so they need to be added on the Country channel level.

Before adding a new Standard assumption record, please critically revise the existing assumptions to make sure you are not creating a duplicate.

Go to one of your channels, find the Country assumption related list (1) and click on “New” (2).

The screenshot shows the 'Country Channel' screen for 'Sandoz Retail Tender'. The top navigation bar includes 'Clone', 'Printable View', 'Change Owner', 'Submit for Approval', 'Edit', and a dropdown. Below the navigation is a table with columns: Country Channel Name, Owner, Company, Distribution channel, and Tender. A 'System Information' section shows 'Created By' and 'Last Modified By'. Below the main table is a section titled 'Country Channels for Parent Country (3)'. On the right side, there are two related lists: 'Country assumptions (3)' and 'CDL Channels (3)'. The 'Country assumptions' list has three items: 1. High, Active, Mexico, 100.0 %; 2. Medium, Active, Mexico, 100.0 %; 3. Low - but this is high competition, Active, Mexico, 100.0 %. The 'CDL Channels' list has three items: 1. CDL Channel 1, 2. CDL Channel 2, 3. CDL Channel 3.

The screenshot shows the 'New Country Assumptions' dialog box. It has three main sections: 'Information', 'GX Penetration', and 'SDZ Market share'. In the 'Information' section, fields include: 'Country Assumptions Name' (6), 'Country Channel' (5), 'Therapeutic area' (1), 'Level of competition' (2), 'Status' (3), and 'Owner'. In the 'GX Penetration' section, there are fields for 'GX Penetration Launch Yr' through 'GX Penetration Yr 10'. In the 'SDZ Market share' section, there are fields for 'SDZ Market share (GX) Launch Yr' through 'SDZ Market share (GX) Yr 2'. At the bottom are 'Cancel', 'Save & New', and a large blue 'Save' button (7).

Choose the Therapeutic area for which this assumption should be selectable in the forecasting process (1)

- If this assumption is not TA-specific and can be used for all Therapeutic areas, please choose "N/A"
- If this assumption is valid for several, but not all TA, you will need to create one assumption for each TA.

Level of Competition (2) defines the market situation for your assumption. You can either use it to define actual competition level (high / medium / low) or use a different classification (e. g. first to market / second to market / later launch).

Best practice: Make the Level of Competition labels as short as possible - this will enhance the usability when selecting the assumptions for forecasting.

Choose "Active" for Status (3) if you want to immediately start using this assumption. Choose "Draft" if you want to draft the assumption and activate it later.

Country (4), Country Channel (5) and Country Assumptions name (6) are filled automatically and do not need to be adjusted.

Add the assumptions (7) for at least L+5.

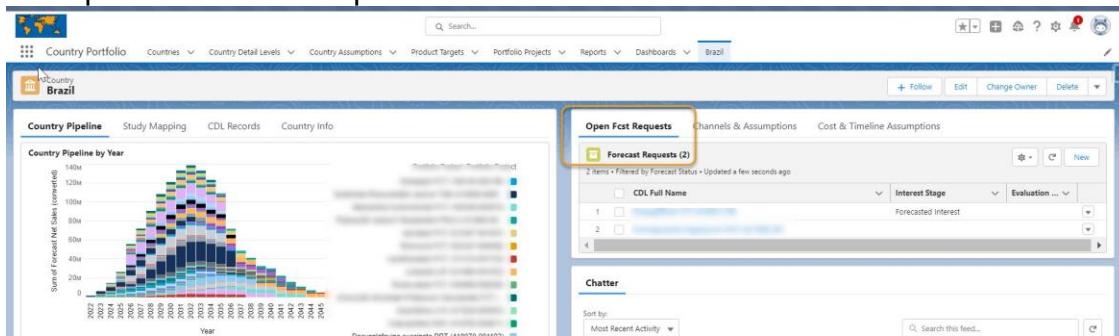
- If you are creating an assumption set for Tender projects that have a shorter lifetime than L+5, explicitly put 0% in the fields for the missing years.

Don't forget to click on "Save".

Get a forecast Request

How do I get to know that I need to create or update a forecast?

The "Open Fcst Requests" tab on your Country page shows all CDLs for which a forecast update has been requested.



Alternatively, you can see this on your CDL:

- Forecast status will show "Update Needed" (1)
- Forecast request will be visible on the CDL record (2)

This screenshot shows the 'Country Portfolio' dashboard. At the top, there's a navigation bar with links like 'Country Portfolio', 'Countries', 'Country Detail Levels', 'Country Assumptions', 'Product Targets', 'Portfolio Projects', 'Reports', 'Dashboards', and 'Brazil'. Below the navigation is a header for 'Country Detail Level Empagmidin FCT (410021) BR'. The main content area has tabs for 'Details', 'Launch Timeline', 'Forecasts & Tgt', 'Mtgs & Escalations', 'Regulatory', 'Status & SPC', 'Team & Sites', 'Files', and 'Dashboard'. A 'Forecast Status' section shows 'Interest Stage' as 'Forecasted Interest' and 'Forecast Status' as 'Update Needed' (highlighted with a yellow box and orange circle). To the right, there's a sidebar with sections like 'Country FC update requests (1)', 'Channels & Packs', 'Ctry & ComOps Interest', 'CDL Channels (0)', and 'Channel Strengths With Pack Sizes (0)'. A 'Forecast Details' section at the bottom right shows 'Forecast First Launch Year: 2026', 'Forecast Sales (Launch Yr): USD 1,918,452.00', 'Weighted Fct Net Sales (Launch Yr): USD 0.00', and 'Forecast Sales (Current Total L+5): Fc Sales Pipeline (Cur Total L+5)'.

Create an Initial Bottom-Up Forecast

Create a set of Channel, Strength and Pack Size combinations to use in forecasting

Initiate creation of Channels

On your CDL record, click on the “Assumption Based Forecast” button.

This screenshot shows the 'Country Portfolio' dashboard. The 'Assumption Based Forecast' button in the top navigation bar is highlighted with a yellow box and orange circle. The rest of the interface is similar to the previous screenshot, showing the 'Country Detail Level Sugammadex sodium LIVI (415039) MX' record with various status and forecast details.

Choose Channels you would like to forecast for by clicking on “Add Row” until all the valid channels are added.

This screenshot shows a modal dialog titled 'Sugammadex sodium LIVI (415039) MX'. It has a 'Manage Channel' tab at the top. A message at the top says 'Currently there is no existing CDL Channel related to this Country Detail Level. Please Click on "Add Row" to add a New Record.' Below this is a table with a single row. At the bottom right of the table is a 'Save CDL Channel and move to Strength and Packs' button and an 'Add Row' button, which is highlighted with a yellow box and orange circle.



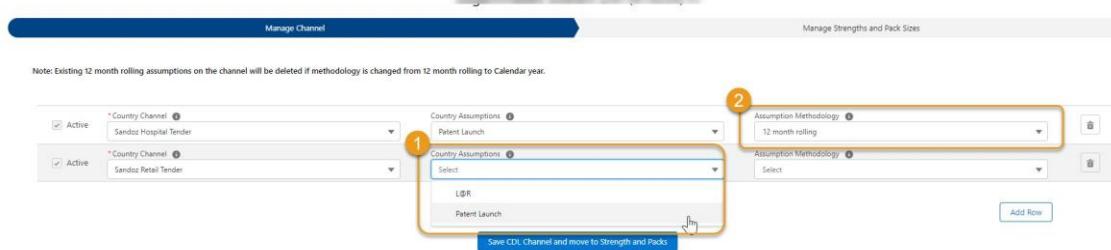
What do do if I cannot see channels I need?

- Go to your Country record
- Make sure that all the channels are added to the Country Channels list
- See [Add all Channels to your Country](#) for details.

Choose forecasting methodology and add standard assumptions from the catalog

If you want to use standard assumptions from your country catalog, select the appropriate assumption set for each channel (1).

If you use standard assumptions, the 12-month-rolling Assumption methodology will be mandatory (2).

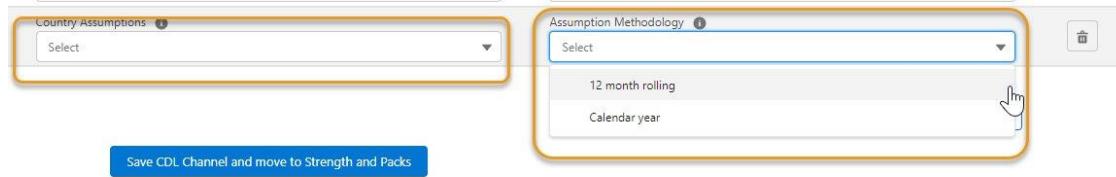


What if no Country Assumptions appear in the drop-down?

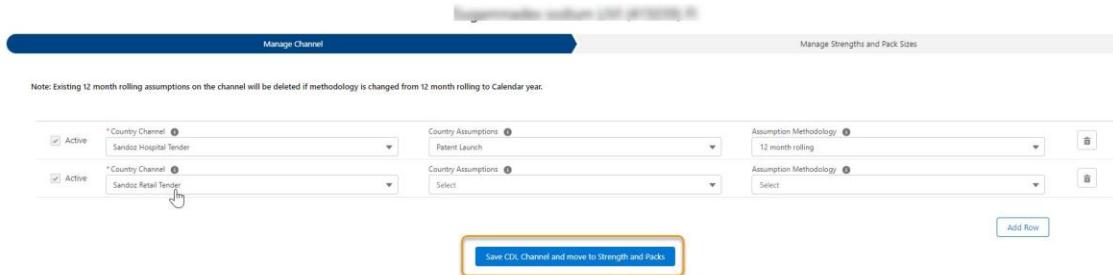
- Go to your Country record
- Make sure that Assumptions are added to the Country assumptions list
 - For the same Channel and
 - For the same Therapeutic area or therapeutic area neutral (N/A)
- Make sure they are in the “Active” status
- See [Add Standard Assumptions to your Channels](#) for details.

If assumptions for your project are unique and cannot be reflected by a standard assumption set, you can decide between:

- A 12 month rolling assumption methodology (your project-specific assumptions will be considered for 12 month cycles starting with the launch date; calendar year assumptions will be re-calculated)
- A calendar year based assumption methodology (your project-specific assumptions will be considered for individual calendar years beginning with the calendar year when your launch takes place)



Click on “Save CDL Channel and move to Strength and Packs” when you are ready with all your channels.



What if I added a channel by accident?

As long as you haven't saved your channels, you can delete them by clicking on the "trash bin" icon on the right. Once you saved them, you will need to deactivate them. For this, come back to this wizard and unclick the "Active" checkbox on the left.

Note: Existing 12 month rolling assumptions on the channels

The screenshot shows a list of channels. The first row contains 'Country Channel' and 'Sandoz Hospital Tender', both with checked 'Active' boxes. The second row contains 'Country Channel' and 'Sandoz Retail Tender', also with checked 'Active' boxes. A hand cursor is positioned over the second row.

Add Strengths and Pack Size combinations

Select one of the Channels and click “Next”.

The screenshot shows a 'Manage Strengths and Pack Sizes' interface. It lists 'CDL Channels': 'Sandoz Hospital Tender' (selected) and 'Sandoz Retail Tender'. A 'Next' button is highlighted with an orange box.

Click on “Add Row” to add Strength and Pack Size combinations to forecast on for this channel.

The screenshot shows a 'Manage Strengths and Pack Sizes' interface. It displays a message: 'Currently there is no existing Channel Strength with Pack Size Records related to this CDL Channel. Please Click on "Add Row" to add a New Record.' An 'Add Row' button is highlighted with an orange box.

Choose from available Strengths, then choose the Primary Pack Size and Secondary Pack Size for each strength. You will see the Total Pack Size calculated as you add these combinations.

Sugammadex sodium LIVI (415039) FI

Manage Strengths and Pack Sizes

Update launch date for all Strengths and pack sizes. The Current planned launch date on the CDL is suggested below.

25.07.2023

<input checked="" type="checkbox"/> Active	*Strength (500 mg) / 5 ml	Primary Pack Size Vi Vial 5	Sec Pack Size 10	Total Pack Size 10	Launch Date 25.07.2023	Max. Acceptable TPC Select	Currency EUR	Forecast Probability 100.00 %	Backup Forecast No	<input type="button" value="Add Row"/>
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What to do if no Strengths or Pack Sizes are available to choose from?

Strength and Pack Size catalogs are managed by Regional Portfolio teams.

- Close this wizard by clicking on the red “Close” button on top (your Channels will be saved, Strengths and pack size combinations can be added later)
- Talk to the Regional PF Manager who is responsible for your Forecast request and ask them to check this information.

Click on “Add Row” until you have added all the needed combinations for this channel.

Manage Strengths and Pack Sizes

Update launch date for all Strengths and pack sizes. The Current planned launch date on the CDL is suggested below.

25.07.2023

<input checked="" type="checkbox"/> Active	*Strength (500 mg) / 5 ml	Primary Pack Size Vi Vial 5	Sec Pack Size 10	Total Pack Size 10	Launch Date 25.07.2023	Max. Acceptable TPC Select	Currency EUR	Forecast Probability 100.00 %	Backup Forecast No	<input type="button" value="Add Row"/>
<input checked="" type="checkbox"/> Active	*Strength (500 mg) / 5 ml	Primary Pack Size Vi Vial 5	Sec Pack Size 1	Total Pack Size 1	Launch Date 25.07.2023	Max. Acceptable TPC Select	Currency EUR	Forecast Probability 100.00 %	Backup Forecast No	<input type="button" value="Add Row"/>
<input checked="" type="checkbox"/> Active	*Strength (200 mg) / 2 ml	Primary Pack Size Vi Vial 4	Sec Pack Size 5	Total Pack Size 5	Launch Date 25.07.2023	Max. Acceptable TPC Select	Currency EUR	Forecast Probability 100.00 %	Backup Forecast No	<input type="button" value="Add Row"/>
<input checked="" type="checkbox"/> Active	*Strength (200 mg) / 2 ml	Primary Pack Size Vi Vial 2	Sec Pack Size 10	Total Pack Size 10	Launch Date 25.07.2023	Max. Acceptable TPC Select	Currency EUR	Forecast Probability 100.00 %	Backup Forecast No	<input type="button" value="Add Row"/>

Note: If no choices are available for Strength or Packs please check that Project Strengths and Packs have been created.

Launch date (1) is copied from the “Current planned launch date” on the CDL, if available. If this field is not populated on CDL, the Launch date column will be empty and will need to be populated manually.

You can adjust the launch dates individually for each Strength and Pack Size combination, or adjust them all at once by changing the launch date in the top left (2) and clicking on “Update”.

You also have the possibility to add Max. acceptable TPC (3). This number always needs to be populated in the local currency!

The Risk and Primary / back up classification (4) are copied from the parent CDL and can be adjusted on the single Strength and Pack Size combination level.

Click on “Save and return to CDL Channels” (5) when you have filed all the information for the given channel.

What to do if I added a Strength and Pack Size combination erroneously?

As long as you haven’t saved your Strength and Pack Size combinations, you can delete them by clicking on the “trash bin” icon on the right. Once you saved them, you will need to deactivate them. For this, come back to this wizard and unclick the “Active” checkbox on the left (6).

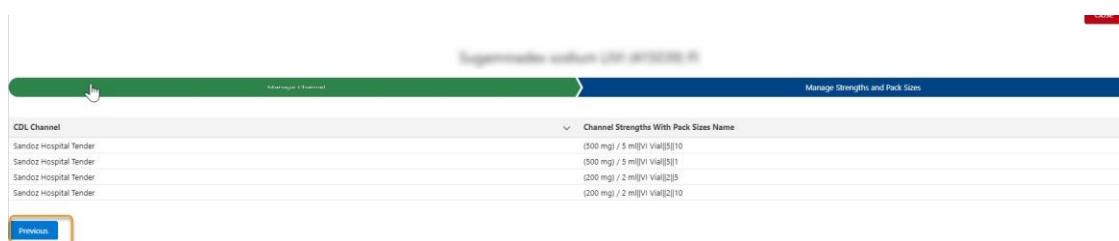
Repeat these steps with all the channels (1).

When you are done, you can review the list of Channels, and Strength and Pack Size combinations before proceeding to finalize your Forecast drafts. To do this, click on “View all Channel Strengths and Pack Size combinations” (2).



To export the Channel, Strength and Pack size details to Excel click the "Export to Excel" button.

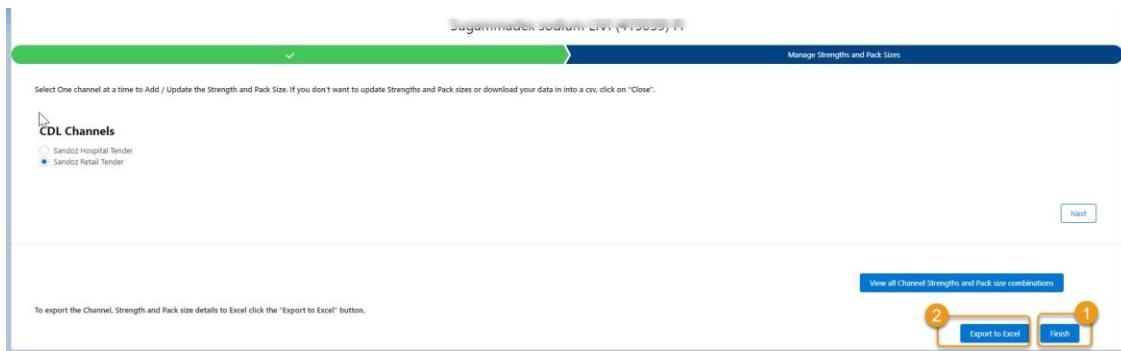
Click “Previous” to return to the wizard.



Proceed to finalizing your forecast draft (decide if to finalize in SANITY or in Excel)

If you had used standard assumptions, you will only need to add some few data points to create forecasts (Market volumes, Market growth, Originator price at launch). If you did not use standard assumptions, you will need to also add GX Penetration, SDZ Market share, Price development and Discount assumptions to all Channel Strength with Pack Size combinations.

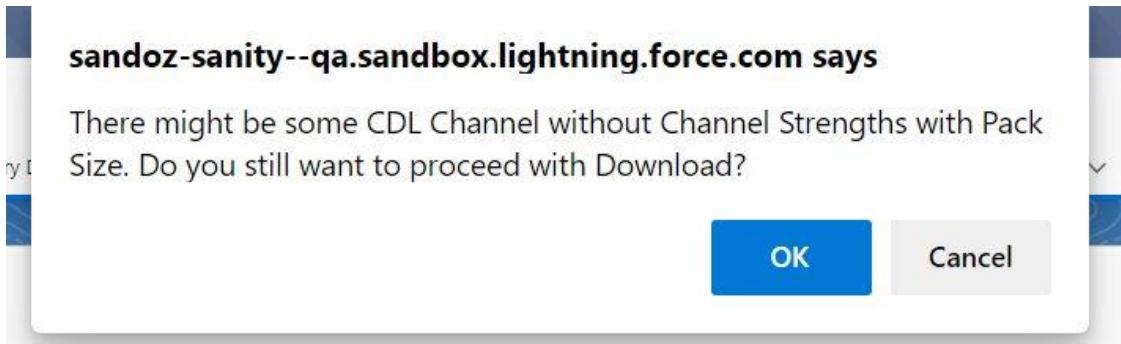
Depending on the amount of data you need to add to create a forecast it's advisable to either add the missing data directly in the system, or use the SANITY Excel download-upload tool. You can review your created Channel Strength and Pack Size combinations in SANITY (you can still use the Excel tool later), or download them straight away and continue to work in Excel.



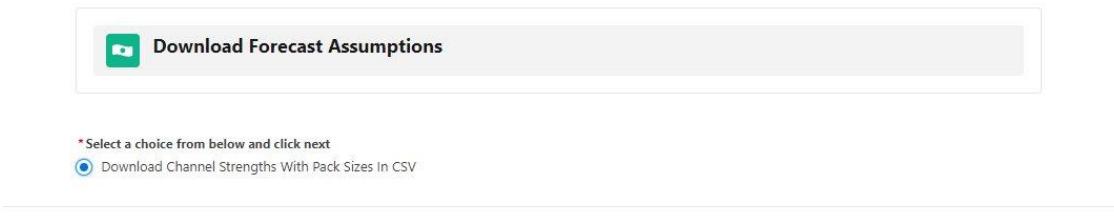
Click on “Finish” (1) if you want to stay in SANITY (you can still download the data later).

Click on “Export to Excel” (2) if you want to download the Channel strength with pack size combinations to excel immediately.

When you click on “Export to Excel”, a warning message will invite you to recall if Strengths and Pack Size combinations were defined for all CDL Channels. Click on “Ok” if you are sure.



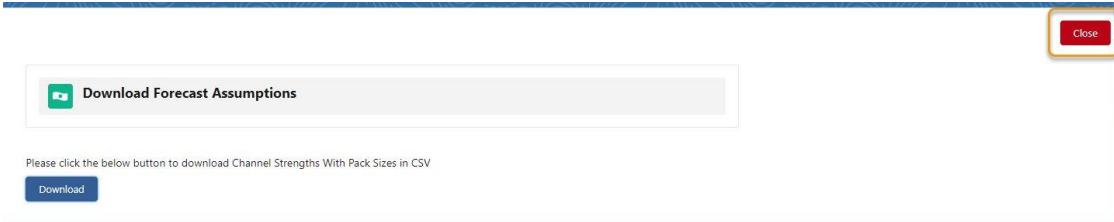
Check the “Download Channel Strengths with Pack Sizes in CSV” checkbox and click “next”.



Click “Download”.



You can now close the Wizard.



Finalize your forecast draft directly in Salesforce

We strongly advise this path for projects with only 1-2 Strength and Pack Size combinations that use standard assumptions - it will take you significantly less time than using excel!

On your CDL record, select a Channel (1) to review / adjust assumptions on the channel level; click on a Channel Strength with Pack Size (2) record to review / adjust assumptions on SKU level and add SKU-specific data to create forecasts.

Review and adjust assumptions on the Channel level

Let's look at the Assumptions on the CDL Channel level.

These assumptions are valid for all Strength-Pack size combinations within this particular channel. If you change these assumptions, they will also change for all the underlying Strength-Pack size combinations.

To bulk-change the assumptions on your channel, you can re-connect it to a different standard assumption set (1). If you remove the standard assumption set connection, all assumptions under (4) will be erased. You can then also change the Assumption methodology (2), deciding between 12 month rolling and Calendar year methodology.

You can change individual assumption values on your Channel (3). These assumption values will be copied to all the Channel strength with pack size records connected to this channel.

Attention: if you reconnect the Channel to a different Country assumptions record after changing assumptions manually, your manual changes will be overwritten!

By removing the “Active” checkbox (4), you deactivate the whole channel. No forecasts will be created for this channel; the already existing forecasts will be turned to “latest planning fcst”=“No”. You can re-activate the channel later (new forecasts will be created).

Dive into single Channel Strength with Pack Size records connected to this channel (5), to adjust assumptions on the SKU level and add missing data for Forecast creation.

Review assumptions and add TPC on SKU level

Let's look at a Channel Strength with Pack Sizes record.

The screenshot shows the 'Channel Strength with Pack Sizes' record for a product with a pack size of '500 mg / 5 ml/Vial|5|10'. The interface includes tabs for 'Assumptions (12 Month Rolling)' (1), 'Assumptions (Manual Entry)' (2), 'Forecasts' (3), 'Information' (4), 'TPC' (5), 'System Information' (6), and 'Forecasts and Actuals' (7). Key fields visible include:

- Assumptions:** Launch Date (25.07.2023), CDL Planned Launch (25.07.2023), Assumption Methodology (12 Month Rolling), Primary Pack (V1 Vial), Secondary Pack (P4 - Euro), Project Strength (318-09338), Country Strength (SKUCO-00040140).
- Information:** Channel strength with pack (500 mg / 5 ml/Vial|5|10), Country Detail Level (CDL-001048), Strength (500 mg / 5 ml), Primary pack size (10), Total pack size (10.00), Pack type (V1 Vial), Primary pack unit (6).
- TPC:** TPC Calendar H1 (2023), TPC Calendar H2 (2023), TPC Calendar H3 (2023), TPC Calendar H4 (2023), Margin Default (0%).
- System Information:** Created By (Natalia Kuehnen), Last Modified By (Natalia Kuehnen), Create On (19.10.2022 12:56), Last Modified On (19.10.2022 12:56), Primary Pack (P4-000079), Secondary Pack (P4-000090), Project Strength (318-09338), Country Strength (SKUCO-00040140).

If you specified market assumptions on the channel level, they will be copied to all Channel Strength with Pack Sizes records connected to this channel. If no assumptions were specified on the channel level, all assumption fields will be empty here.

Assumptions are always calculated both on 12 month rolling basis and on Calendar yr basis (based on the launch date). If you chose the 12 month rolling methodology for your channel, the assumptions you added will be considered as 12 month rolling assumptions and re-calculated for calendar years. If you chose the calendar year based assumption methodology, the assumptions you added will be considered as calendar year assumptions and re-calculated to 12 month rolling methodology.

If needed, you can adjust the launch date for this particular SKU (2). The Current planned CDL launch date (3) is displayed just below that for reference.

The individual Channel Strength with Pack Size record can be de-activated (4). If any active forecasts exist for this Channel strength with pack size, they will be turned to “latest planning fcst”=“No”. You can re-activate the Channel Strength with Pack Sizes record later (new forecasts will be created).

Max. acceptable TPC (5) and assumed TPC on Calendar year basis (6) can be added manually.

Adjust assumptions and finalize forecast creation on SKU level

Let us now go to the “Assumptions (Manual Entry)” tab (1), where assumptions can be reviewed, adjusted or defined from scratch for a single Channel strength with pack size. Here, we will also add metrics necessary to finalize the creation of a forecast.

Channel Strengths With Pack Sizes
(500 mg) / 5 ml||VI Vial||5||10

Assumptions (Cal Yr) Assumptions (12 Mon Rolling) **Assumptions (Manual Entry)** Forecasts

Assumptions (Calendar Yr or 12 months rolling) that are entered manually or taken from the assumption catalog (12 month rolling only). In order to adjust assumptions based forecast".

1

2 Market development before launch - ENTRY fields

Total Market Units MAT-01 ⓘ Total Market Units MAT-02 ⓘ
Market Growth until Launch ⓘ Total Market Units MAT-03 ⓘ
Total Market Units MAT-04 ⓘ Total Market Units MAT-05 ⓘ

3 Market development after launch - ENTRY fields

Market Growth Launch Yr Entry ⓘ Market Growth Yr 6 Entry ⓘ
Market Growth Yr 1 Entry ⓘ Market Growth Yr 7 Entry ⓘ
Market Growth Yr 2 Entry ⓘ Market Growth Yr 8 Entry ⓘ
Market Growth Yr 3 Entry ⓘ Market Growth Yr 9 Entry ⓘ
Market Growth Yr 4 Entry ⓘ Market Growth Yr 10 Entry ⓘ
Market Growth Yr 5 Entry ⓘ

Gx Penetration - ENTRY fields

Gx Penetration Launch Yr Entry ⓘ 100.0 % Gx Penetration Yr 6 Entry ⓘ
Gx Penetration Yr 1 Entry ⓘ 100.0 % Gx Penetration Yr 7 Entry ⓘ
Gx Penetration Yr 2 Entry ⓘ 100.0 % Gx Penetration Yr 8 Entry ⓘ
Gx Penetration Yr 3 Entry ⓘ 100.0 % Gx Penetration Yr 9 Entry ⓘ
Gx Penetration Yr 4 Entry ⓘ 100.0 % Gx Penetration Yr 10 Entry ⓘ
Gx Penetration Yr 5 Entry ⓘ

SDZ Market Share - ENTRY fields

SDZ Market Share Launch Yr Entry ⓘ 100.0 % SDZ Market Share Yr 6 Entry ⓘ
SDZ Market Share Yr 1 Entry ⓘ 50.0 % SDZ Market Share Yr 7 Entry ⓘ
SDZ Market Share Yr 2 Entry ⓘ 50.0 % SDZ Market Share Yr 8 Entry ⓘ
SDZ Market Share Yr 3 Entry ⓘ 50.0 % SDZ Market Share Yr 9 Entry ⓘ
SDZ Market Share Yr 4 Entry ⓘ 50.0 % SDZ Market Share Yr 10 Entry ⓘ
SDZ Market Share Yr 5 Entry ⓘ

4 Originator Price Development - ENTRY fields

Originator Price at Launch ⓘ Originator Price Yr 1 Entry ⓘ
Originator Price Yr 2 Entry ⓘ Originator Price Yr 3 Entry ⓘ

The assumptions under the "Assumptions (Manual Entry)" tab (1) feature assumptions that were copied from the Channel. If no assumptions were copied from the channel, all these fields will be empty and will need to be populated manually.

The data structure allows to add assumptions for up to Launch + 10 years; however, fields for years 6-10 are not mandatory and can be left empty if you are forecasting for L+5.

In addition to market assumptions that might or might not come from channel, following metrics will need to be added on the Channel strength with Pack size level:

- Market development before launch (2) - here, at least Total Market Units MAT-01 and Market Growth until Launch need to be populated
- Market development after launch (3) for L+5
- Originator Price at Launch (4)

Now your forecast is ready to be created. Refresh your page to see the forecast for your Channel strength with pack size!

Your new forecast is in the “Needs review” status - this means it is considered a draft and is not part of any pipeline.

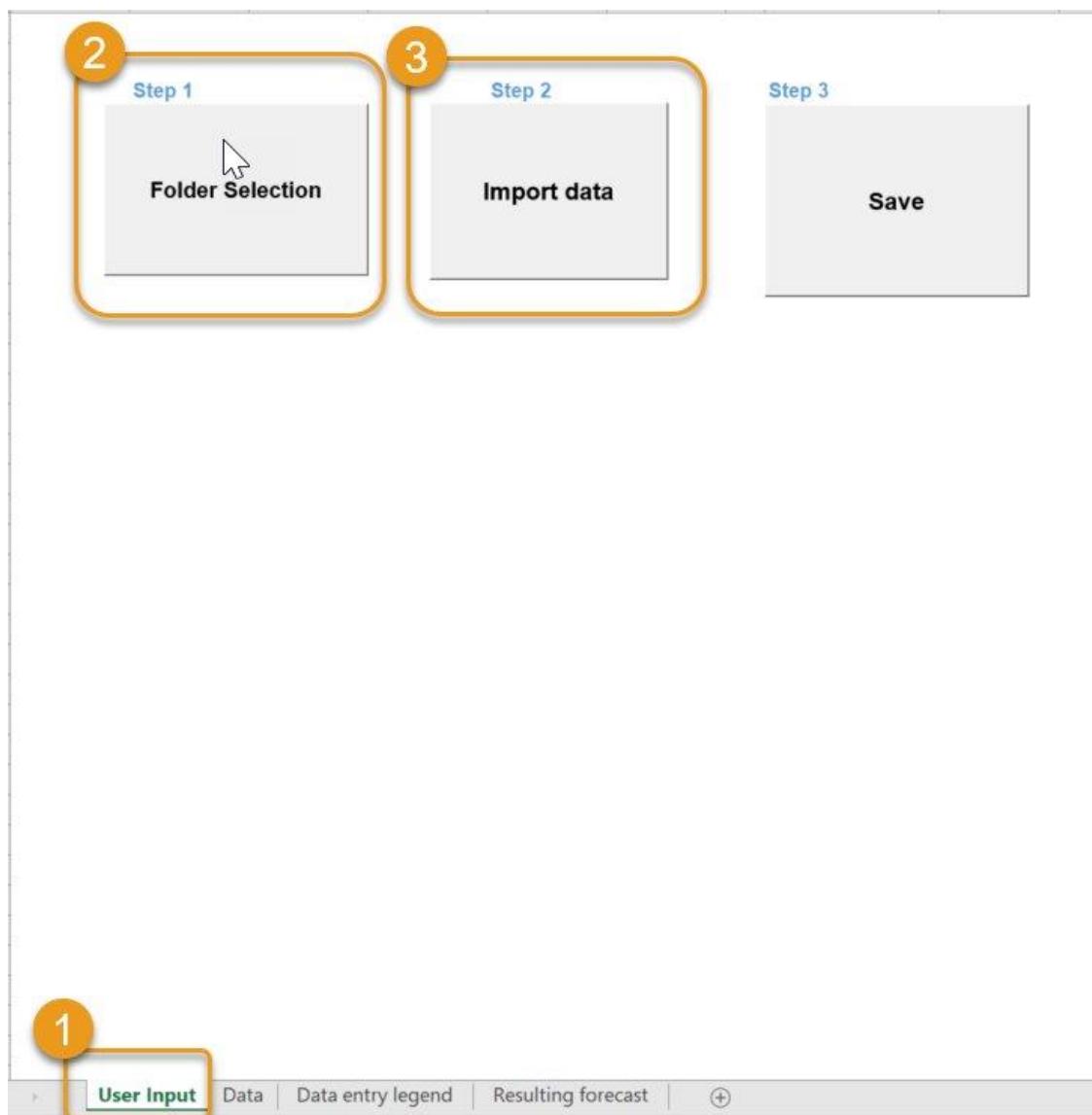
Finalize your forecast draft using excel downloader

Download SANITY data and open it in the Forecasting Download-Upload tool

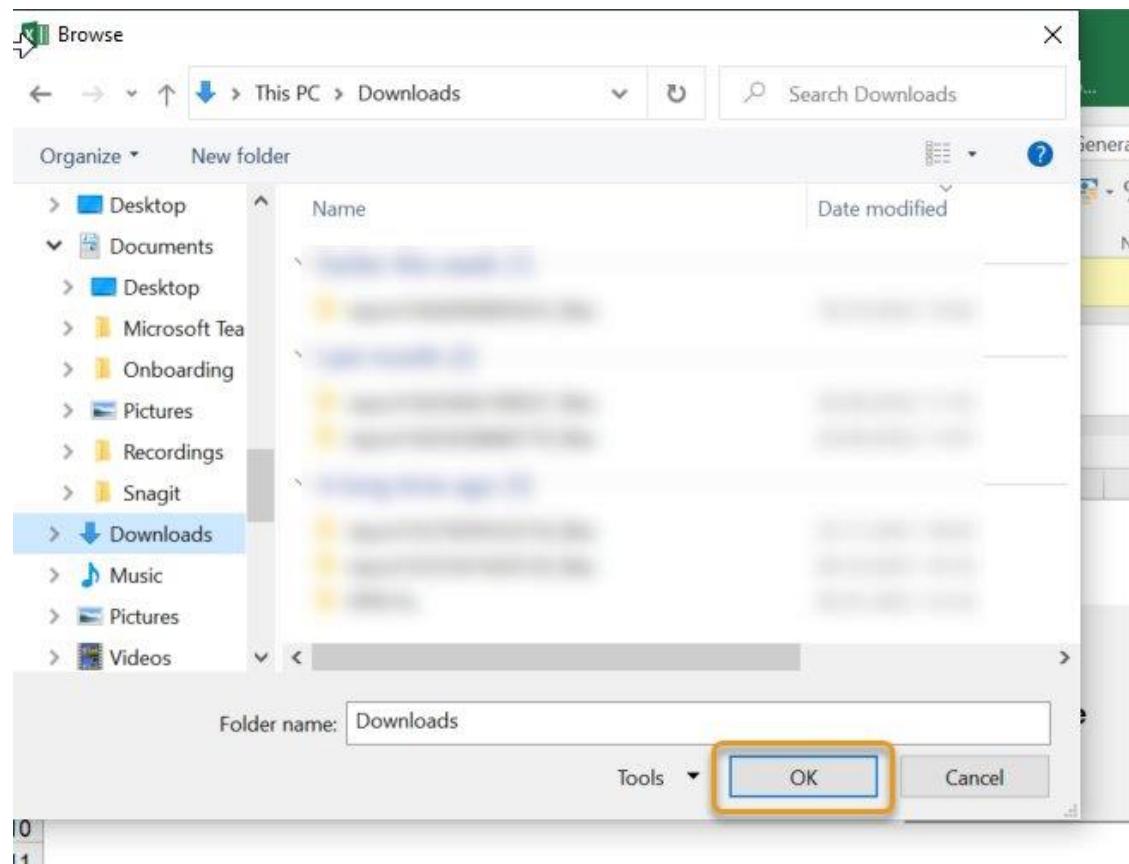
To finalize the forecast drafts using excel and upload them effectively back into SANITY, you need to download a csv file containing all the necessary data. You can either do this immediately after creating Channels and Strength with pack size combinations (see [Proceed to finalizing your forecast draft \(decide if to finalize in SANITY or in Excel\)](#)); or you can also do this any time by clicking on the “Download / Upload FC Assumptions” button on your CDL record and going through the download process.

Open the Excel download-upload tool to adjust your assumptions (or the version of this document integrated into your internal excel template). Please download the Excel download-upload tool to your desktop in case you do not have it:

[SANITY_FC_Masterfile_wCalculation.xlsx](#)



If you use the tool for the first time, you would have to select the folder where your SANITY data is downloaded to. On the “User Input” tab (1), click on “Folder Selection” (2) and select the folder where the SANITY data was downloaded. You don’t have to select any document.



Attention: the tool will pick the latest csv document from the defined folder. If you expect other csv documents to interfere between your downloading data from SANITY and opening this tool, it is advisable to create a separate folder for SANITY downloads.

Once the folder is selected, click on “Import data” (3). You should land on the “Data” tab now.

Assumption methodology	Channel Name	Strength	Pack Type	Primary Pack Size	Primary Pack Unit	Secondary Pack Size	Total pack size	Launch Date	Total Market Units MAT-05	Total Market Units MAT-04	Total Market Units MAT-03
12 month rolling	Sandoz Hospital Tender (500 mg) / 5 ml	Vial		5 ml			10	10	25.07.2023		
12 month rolling	Sandoz Hospital Tender (500 mg) / 5 ml	Vial		5 ml			1	1	25.07.2023		
12 month rolling	Sandoz Hospital Tender (200 mg) / 2 ml	Vial		2 ml			5	5	25.07.2023		
12 month rolling	Sandoz Hospital Tender (200 mg) / 2 ml	Vial		2 ml			10	10	25.07.2023		

What to do if I see everything on one line or anyhow messed up?

Your country / locale settings in SANITY differ from your Excel settings. Contact your SANITY Super user to help you adjust your locale in SANITY, then download the csv file again.

Adjust your assumptions and add necessary data to create forecasts

The fields in the “Data” tab are color coded.

The grey fields provide information about the defined channels, strengths and pack sizes, as well as the Salesforce ID. These fields should not be changed!

The white fields can be edited.

The orange fields are copied from the assumptions in SANITY, but can also be changed.

In order for the forecast to be calculated, following fields need to have a reasonable value:

- Launch date
- Total Market Units MAT-01
- Market Growth until Launch

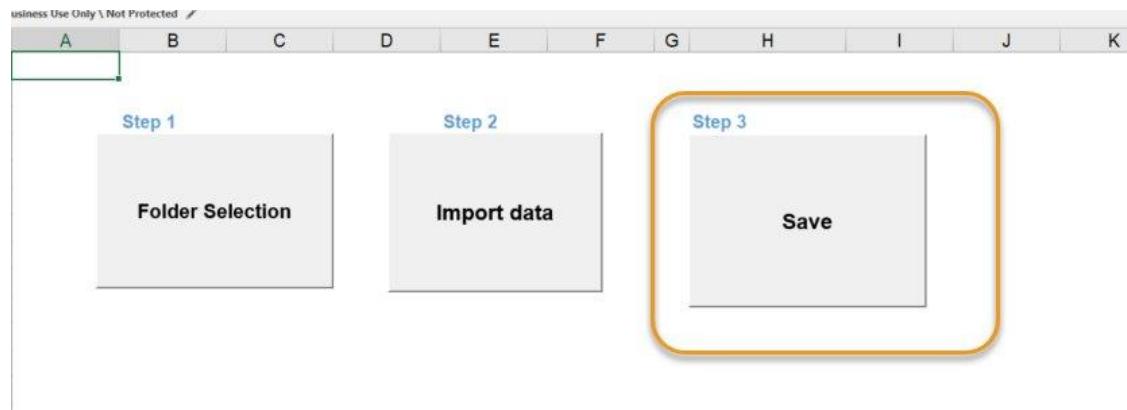
- Market Growth Launch Year
- Market Growth*
- GX Penetration*
- Market Share*
- Originator Price at Launch
- GX Price Level*
- Discount*

*For Launch year + as many years as you would like to forecast for.

On the “Resulting forecast” tab, you will see the forecasts calculated from the assumptions you entered.



When you are happy with your data, go back to the “User Input” tab and click on “Save”. A Salesforce readable .csv file will be saved in the location you defined. You should name it in an easily identifiable way for when you upload it back to SANITY!



On your CDL, click on “Download / Upload FC Assumptions” to upload your csv back to SANITY.

This screenshot shows a project management interface. At the top, there are several buttons: '+ Follow', 'Assumption Based Forecast', 'Download/Upload FC Assumptions' (which is highlighted with a yellow box), 'Submit CDL Channels for Approval', 'Change Owner', and 'Manage'. Below this, there's a section for 'Risk Status, & Interest' and 'Overall Project Status'. A timeline at the bottom shows stages MS 0 through MS 6.

This time, choose the “Upload” option, click “Next”:

This screenshot shows the 'Upload/Download Forecast Assumptions' step. It has a note: "Select a choice from below and click next". Two options are available: "Upload Channel Strengths With Pack Sizes In CSV" (which is selected and highlighted with a yellow box) and "Download Channel Strengths With Pack Sizes In CSV". At the bottom right is a 'Next' button, which is also highlighted with a yellow box.

Upload your csv file and click “Next”:

This screenshot shows the 'Upload/Download Forecast Assumptions' step. It has a note: "Upload Channel Strength With Pack Sizes". There is a 'Upload Files' button (highlighted with a yellow box) and a placeholder "Or drop files". At the bottom right are 'Previous' and 'Next' buttons, with the 'Next' button highlighted with a yellow box.

You should get a message that tells you that your file was uploaded “successfully” or “partially” (1). Both options mean that the file was uploaded correctly. Click finish (2) to finalize the upload.

If you see a message saying that the file upload failed, please contact your SANITY Super User.

This screenshot shows the 'Upload/Download Forecast Assumptions' step after a successful upload. A message says: "Your file was uploaded partially!" followed by "Please click on the below link to see the success and error details: ID#000021". At the bottom right are 'Previous' and 'Finish' buttons, with the 'Finish' button highlighted with a yellow box.

Review your SKU-level forecasts

Important: in SANITY, a “forecast” means a forecast for one particular combination of Channel, Strength and Pack size. So if you are forecasting for 2 channels with 3 Strengths each and 2 Pack sizes per strength, you will get $2 \times 3 \times 2 = 12$ SANITY “forecasts”.

Once all necessary information is added to your Channel Strengths with Pack Sizes, a forecast will be created automatically for every Channel strength with pack size. You can access these forecasts from the “Forecasts & Tgt” tab on the CDL record, from CDL Channel or from a single Channel strength with pack size. Let's look at forecasts created for one channel. Choose one of the forecasts on the right and click on the blue forecast name.

The screenshot shows the SAP S/4HANA interface for managing forecasts. At the top, there is a header bar with the title "CDL Channel Sandoz Hospital Tender". Below the header, the main content area displays a table of forecasts and actuals. On the right side of the table, there is a callout box titled "Forecasts and Actuals (4)" containing several forecast entries. One entry is highlighted with a yellow border. The table below the callout shows more detailed forecast information, including fields like "Key Details", "Forecast Charts", and "Sales By Year". A second callout box, titled "This Forecast is NOT additive to Pipeline Value (7)", is located on the right side of the forecast table. It contains a chart titled "Forecasts Overview" showing "Net Sales & Cost" over time from 2023 to 2028. The chart has two series: "Sum of Forecasts Net Sales (converted)" and "Sum of Forecast Product Cost". The chart shows a general upward trend in net sales over the five-year period.

The “Latest Planning Fcst” (1) shows the status of your forecast. A forecast can have following status:

- Needs review → draft status; the forecast has not yet been submitted for regional portfolio approval.
- In approval → this forecast has already been submitted for regional portfolio approval.
- Yes → this forecast has been approved and is considered as “current” and part of the pipeline.
- No → this forecast is deactivated or archived as an older version.

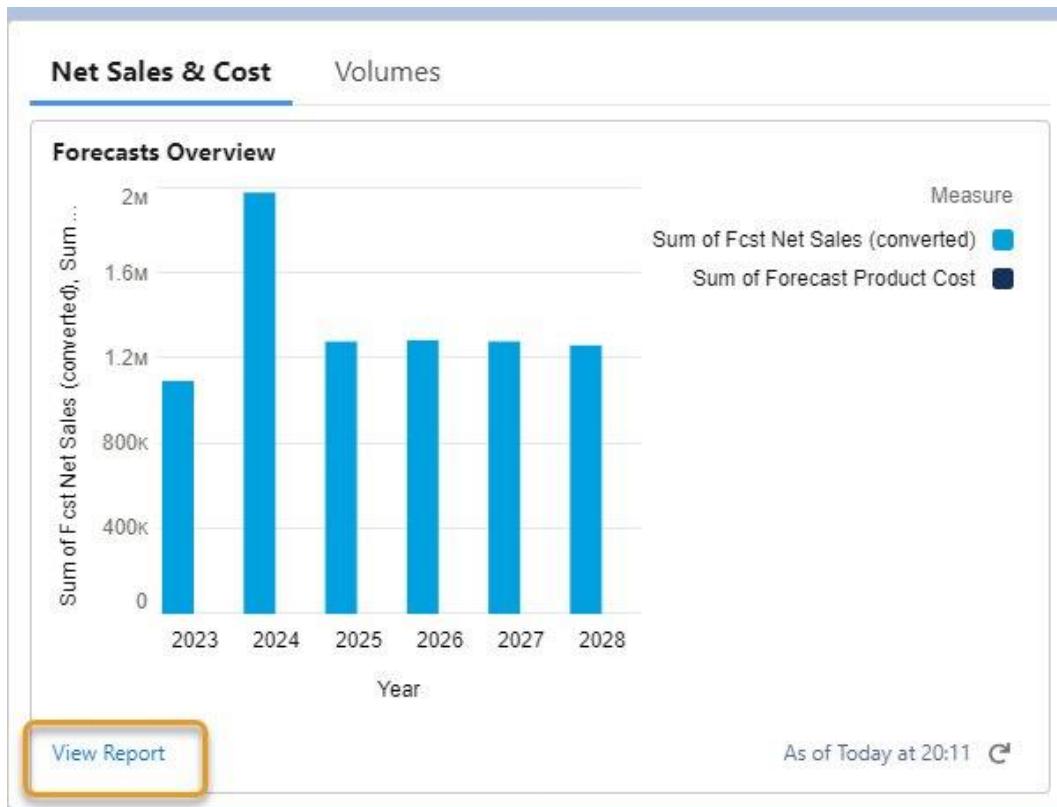
A checkbox (2) indicates that this forecast has been created based on market assumptions.

Below this field, you can see what channel and strength-pack size combination this forecast has been created for (3).

The forecast probability (4) is documented on the CDL, but can be adjusted individually on the forecast level and influences the Combined risk factor field (5).

Key reason for forecast update (6) can be populated when submitting a forecast for approval, once for all forecasts of the same channel.

Sales and Volume graphs (7) offer you a good overview over Volume and Sales development in your forecast. Click on “view report” to get a tabular view of the values behind the graphs.



Scroll down to review further details of your calculated forecast.

Update a bottom-up forecast

Do I need to re-create everything from scratch?

If calculated based on valid market assumptions, forecasts do not always need to be completely re-created from scratch when an update is requested. A change in the launch date or specific changes in assumptions can be performed directly in SANITY with a few clicks, and will result in creation of new forecast drafts.

Fast track forecast update directly in the system

Another set of Standard Market Assumptions needs to be used

On your CDL record, click on “Assumption Based Forecast”; change the standard assumption used for your channel. Click on “Save CDL Channel and move to Strengths and Packs”. New forecast drafts will be created based on your changed assumptions.

The screenshot shows a software interface for managing channels. At the top, there are tabs for "Manage Channel" and "Manage Strengths and Pack Sizes". Below these, a note says: "Note: Existing 12 month rolling assumptions on the channel will be deleted if methodology is changed from 12 month rolling to Calendar year." There are two sections for "Country Channel": one for "Sandoz Hospital Tender" and another for "Sandoz Retail Tender", both marked as "Active". Each section has a "Country Assumptions" dropdown. The second section's dropdown is open, showing options like "Country Assumption", "Patent Launch", "L&R", and "Patent Launch". The "L&R" option is highlighted with a yellow box and has a cursor pointing at it. To the right of the dropdown are "Assumption Methodology" dropdowns set to "12 month rolling". At the bottom right is a blue "Save CDL Channel and move to Strength and Packs" button.

Click on “Finish” of no further steps are needed. Select a channel and click on “Next” if you need to adjust single Strength and pack size combinations for this channel.

The screenshot shows a software interface for managing strengths and pack sizes. At the top, there is a green progress bar and a "Manage Strengths and Pack Sizes" tab. Below the progress bar, a note says: "Select One channel at a time to Add / Update the Strength and Pack Size. If you don't want to update Strengths and Pack sizes or download your data in into a csv, click on "Close"." Under "CDL Channels", there are two options: "Sandoz Hospital Tender" and "Sandoz Retail Tender", with the first one checked. To the right is a "Next" button. In the center, there is a link "View all Channel Strengths and Pack-size combinations". At the bottom, there are two buttons: "Export to Excel" and "Finish", with the "Finish" button highlighted with a yellow box.

Assumptions change marginally on the Channel level, or for a particular Strength-pack size combination

You can also go directly into a Channel record to change single assumption points manually. Your changes will result in creation of a new set of draft forecasts for this channel.

Same can be done on the level of a single Strength-pack size combination - e. g. if Originator price, Market volume at launch or an SKU-specific GX penetration value needs to be adjusted.

In this case, a new forecast draft will only be created for the particular Channel strength with pack size combination.

Change of Launch date

On your CDL, click on “Assumption Based Forecast”. Click through to the “Manage Strengths and Packs” section, choose a channel and click “Next”.

Select One channel at a time to Add / Update the Strength and Pack Size. If you don't want to update Strengths and Pack sizes or download your data in into a csv, click on "Close".

CDL Channels

Sandoo Hospital Tender
Sandoo Retail Tender

Manage Strengths and Pack Sizes

To export the Channel, Strength and Pack size details to Excel click the "Export to Excel" button.

View all Channel Strengths and Pack size combinations

Export to Excel **Finish**

Adjust the launch date for all Strength-pack size combinations connected to this Channel (1), or for one individual Strength-pack size combinations (2).

Update launch date for all Strengths and pack sizes. The Current planned launch date on the CDL is suggested below.

25.07.2023 **Update**

Active	*Strength	Primary Pack Size	Sec Pack Size	Total Pack Size	Launch Date	Max. Acceptable TPC	Currency	Forecast Probability	Backup Forecast
<input checked="" type="checkbox"/>	*Strength (500 mg) / 5 ml	Vi Vial 5	10	10	25.07.2023	Select	EUR	100,00 %	No
<input checked="" type="checkbox"/>	*Strength (500 mg) / 5 ml	Vi Vial 5	1	1	25.07.2023	Select	EUR	100,00 %	No
<input checked="" type="checkbox"/>	*Strength (200 mg) / 2 ml	Vi Vial 2	5	5	25.07.2023	Select	EUR	100,00 %	No
<input checked="" type="checkbox"/>	*Strength (200 mg) / 2 ml	Vi Vial 2	10	10	25.07.2023	Select	EUR	100,00 %	No

Don't forget to save:

Note: If no choices are available for Strength or Packs please check that Project Strengths and Packs have been created.

Save and return to CDL Channels

Make sure you repeat this for all the channels where you need to adjust the launch date! Change of launch date will lead to creation of new draft forecasts for all Strength-pack size combinations for which the launch date was changed.

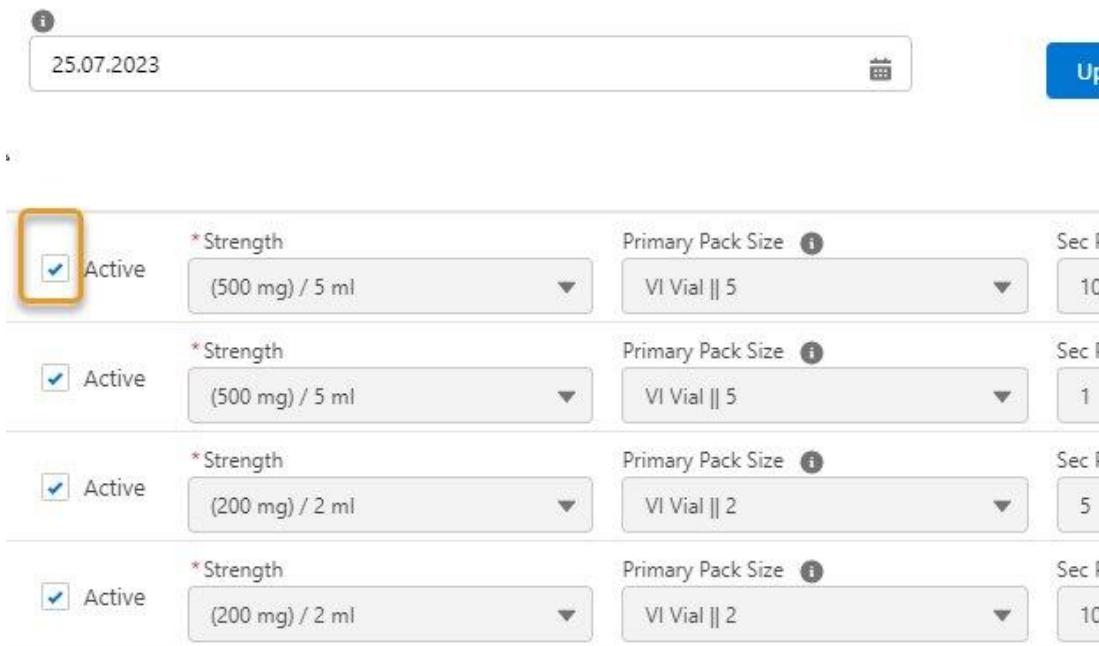
Deactivation / re-activation of certain Channel-strength-pack size combinations

In the same wizard, you can deactivate whole channels or single Channel strength pack size combinations by unclicking the “Active” checkbox. This will turn all the forecasts connected to this channel or strength-pack size combination to Latest Planning Fcst = “No”.

Note: Existing 12 month rolling assumptions on the channel will be

<input checked="" type="checkbox"/> Active	* Country Channel <small>i</small>
	Sandoz Hospital Tender
<input checked="" type="checkbox"/> Active	* Country Channel <small>i</small>
	Sandoz Retail Tender

Update launch date for all Strengths and pack sizes. The Current planned launch date on the CDL is suggested below.



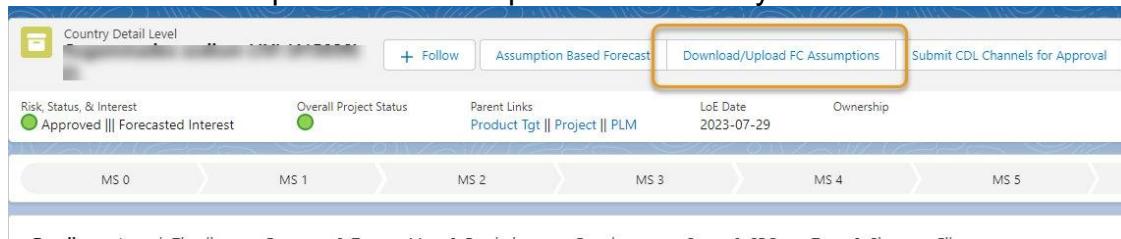
The screenshot shows a table of product variants with columns for Active status, Strength, Primary Pack Size, and Secondary Pack Size. The first row has its 'Active' checkbox highlighted with a yellow box. The second row has its 'Active' checkbox checked. The third and fourth rows also have their 'Active' checkboxes checked. The fifth row has its 'Active' checkbox checked.

Active	* Strength	Primary Pack Size	Sec P
<input checked="" type="checkbox"/>	(500 mg) / 5 ml	VI Vial 5	10
<input checked="" type="checkbox"/>	(500 mg) / 5 ml	VI Vial 5	1
<input checked="" type="checkbox"/>	(200 mg) / 2 ml	VI Vial 2	5
<input checked="" type="checkbox"/>	(200 mg) / 2 ml	VI Vial 2	10

In case your Channel or Strength-pack size combination was already de-activated, you can re-activate it by clicking the “Active” checkbox. This will trigger creation of new forecast drafts for this channel or Strength-pack size combination.

Full forecast update using excel download - upload tool

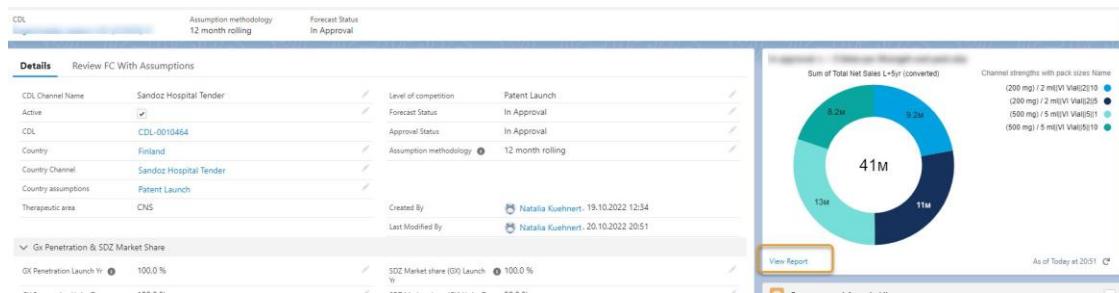
Click on “Download / Upload FC Assumptions” button on your CDL.



Follow the process described in [Adjust your assumptions and add necessary data to create forecasts](#)

Get your forecasts released by Regional Portfolio

Review your assumptions on the Channel level before submitting for approval

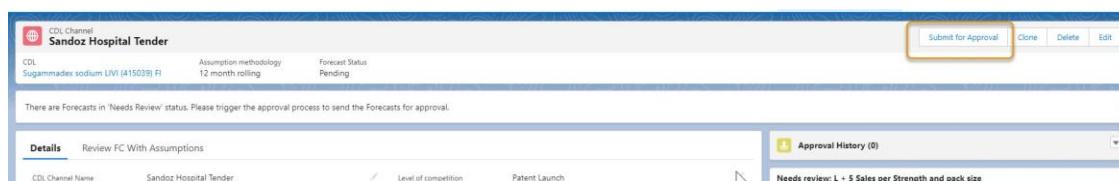


On the right side, you will find a pie chart showing the forecasted total sales number for your CDL Channel, grouped by Strength-pack size combinations. Click in “View report” to see all the assumptions for the channel and all the resulting forecast numbers in the tabular form.

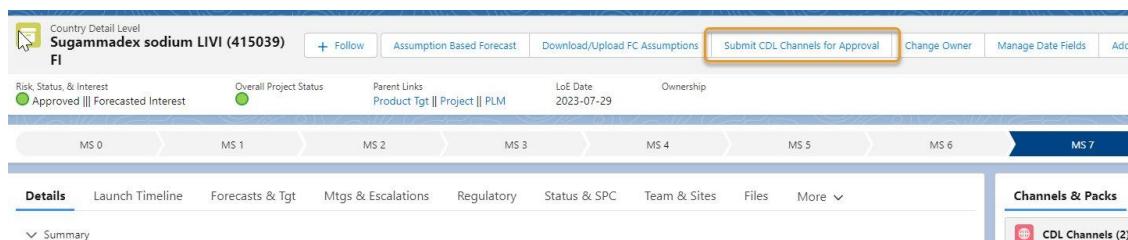
Submit Forecasts for Approval

You can request regional portfolio approval for each channel separately, or for the whole CDL.

If you want to submit a single channel, click on “Submit for Approval” on your Channel record; forecasts for all Strengths and Pack Sizes under this channel will be submitted for regional portfolio approval.



If you want to submit all channels together, go to your CDL record and click on “Submit CDL Channels for Approval”. All draft forecasts under the CDL will be submitted for approval.



Specify the reason for your forecast update by choosing the option that fits best.

The screenshot shows a user interface titled "Submit CDL Channels for Approval". At the top left, there is a label "E" and a dropdown menu labeled "* Key reason for FC update" containing the option "-- none selected --". On the right side, there is a blue "Next" button. Below the dropdown, there is a large empty white area with the text "Country Channel:" at the bottom right.

If you choose the “Launch date delayed” option, you will be asked to specify the reason for the launch delay.

This screenshot is similar to the previous one, but the "Key reason for FC update" dropdown now contains "Launch date delayed". The "Reason for launch delay" dropdown has a red border around the option "-- none selected --". A dropdown menu is open, showing several options: "IP" (which is highlighted with a mouse cursor), "Reg", "Supply", "Development", "Clinical", "Legal", "QA", and "Other (E.g. no source, no source signed, etc.)". The "Next" button is visible on the right.

Click “Next” when you are done.

Your “Forecast status” on CDL will change to “Submitted for approval” (if you only submit part of the channels for approval, the Forecast status will be “Partially submitted for approval”).

Your “Latest Planning Fcst” value on your forecasts will change to “In approval”.

Understand if your Forecasts were Released, Rejected or sent back for review

Regional Portfolio manager can manage your forecasts in one of the following ways:

- Release forecasts for some or all channels to pipeline
- Reject forecasts for some or all channels, sending them back for review
- Reject forecasts for some or all channels permanently.

If your forecasts are approved by Regional portfolio, the “Latest planning Fcst” value on your forecasts will change to “Yes”. If the channel was holding a previous version of assumption based forecasts, they will automatically change to “Latest planning Fcst” = “No”.

If Regional Portfolio rejects your Channel, sending forecasts back for review, the Latest Planning Fcst field will turn back to the “Needs review” value.

If Regional Portfolio rejects your Channel permanently, the Latest Planning Fcst value will turn to “No”.

You can view the rejection details on the right side of your Channel record:

The screenshot shows a detailed view of a Channel record. At the top, there's a navigation bar with various links like 'Country Portfolio', 'Country Detail Levels', 'Country Assumptions', etc. Below the navigation is the main content area. On the left, there's a sidebar with sections like 'Details', 'Review FC With Assumptions', and 'Gx Penetration & SDZ Market Share'. The main body contains several tables with data. To the right, there's a panel titled 'Approval History (3+)' which lists three entries. The first entry is highlighted with a yellow box and has a detailed view below it. This view shows the date (20.10.2022 21:51), status (Rejected), assigned to (Europe CDL Channel Approvers), and actual approver (Natalia Kuehnert). A comment field contains the text: 'This channel is out of scope'. The other two entries in the list are also detailed with similar information.

Review the “Actual Approver” field to see who rejected your forecasts, and the Comments field to see the reason for rejection.

Please ask your Regional Portfolio or a SANITY SuperUser if you have questions!