SANITY
Forecasting

Dear forecasting community,

Following the recent heads-up via Teams chat, I would like to share with you some additional information on the recent updates of the download/upload process for assumption based forecasting in SANITY. Many of you provided us valuable feedback and we were able to integrate most of it.

Here the overview, details below:

1. Enhanced Master file available
2. File selection instead of folder selection
3. Help texts integrated
4. E-mail notification
5. Pipeline Value status integrated

Important: The process **still works with previous template**, but returns likely an error message (details at bottom)

A big "Thank you!" to everyone forecasting via SANITY and contributing to its constant improvement!
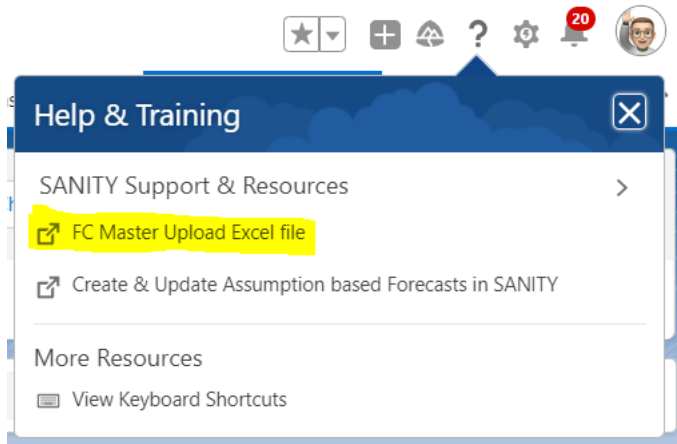
Happy forecasting,

Heiko on behalf of the whole team

1. Enhanced Master file available

The upgraded Mater file for the management and upload of assumptions is available via the known links. File name is "SANITY_Master file incl calculation_2022-03-24_updated". We strongly recommend you to use the upgraded version going forward.
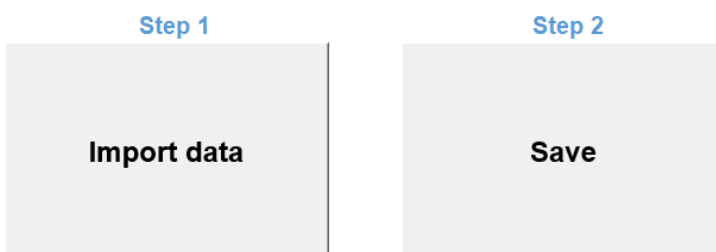
Option 1: Directly in SANITY

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Option 2: SANITY forecasting SharePoint (go/sanityfc) in "Helpful documents" section

2. File selection instead of folder selection

To integrate the channel/strength/pack size information and (if already existing) previous assumptions from the downloaded *.csv file into the Master Template (see 1.), you are in tab "User Input" prompted to select directly the file instead of the containing folder as previously.

New:

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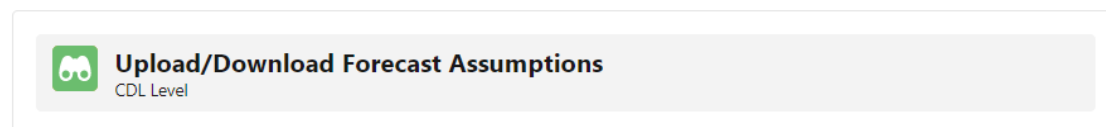
Old:

3. Help texts integrated

The updated Master File (see 1.) now contain help texts with instructions for every assumption category directly above the data entry fields.

Example for "Discount" assumptions:

AR	AS	AT	AU	AV	AW
Average SDZ discount (gross to net) in **absolute** (no negatives) percentage in respective period (calendar year or 12 months)					
Discount Launch Yr	Discount Yr 1	Discount Yr 2	Discount Yr 3	Discount Yr 4	Discount Yr 5
71,30%	73,76%	76,22%	78,68%	81,14%	83,60%

4. E-mail notification

Once assumptions are uploaded to SANITY, you will see the following pop-up.

Upload/Download Forecast Assumptions
CDL Level

Dear SANITY user, uploaded records are being processed. You will receive an email once the transaction is complete. You can close the wizard now.

And soon after, you will receive an e-mail notification stating the – hopefully – successful processing of the uploaded assumptions. The number of "records processed" should match the number of forecast lines that you created and loaded.
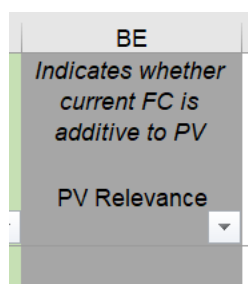
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Dear Heiko Bullinger,

The processing of CSV file to records is completed. Please refer to the details below

Transaction Type	Forecast Upload CSV File
Status	COMPLETED
Total No. of records in transaction	12
No. of records processed	12
No. of records failed	0

5. Pipeline Value status integrated

An added column at the end of the "Data" tab in the Master File (see 1.) indicates whether the current FC line is additive to Pipeline Value or not. This functionality is only valid for forecasts previously created in SANITY on channel-strength-pack size level. It will soon get activated for the download.

BE
Indicates whether current FC is additive to PV
PV Relevance

The process still works with previous template

You can still use the previous template for uploading forecasts that you already started working on. But be aware, that the e-mail notification will likely state an error (example below). As long as "No. of records processed" is in line with your forecast lines, the load should be ok.

Transaction Type	Forecast Upload CSV File
Status	COMPLETED WITH ERRORS
Total No. of records in transaction	11
No. of records processed	1
No. of records failed	10

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Alternatively, you could load the initially downloaded SANITY information (channel-strength-pack size) into the new Master Template (see 1.) and copy paste (only values!) the updated assumptions from the old to the new file – number and order of lines/columns are identical.

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