

Bernhard Hauth
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SANITY Portfolio Management Tips & Tricks

SANDOZ

Purpose of this document

Recently, a larger number of support tickets had been raised.
This document gives you guidance to avoid some common challenges
and helps in making your work smoother.

CONTENT

- 1 Updating ‘Latest Forecast’
- 2 Value ‘ZERO’ in a Forecast
- 3 Locale issue
- 4 Why can’t I create a new FC?
- 5 Uploading a Forecast
- 6 Fast Track Selection

Updating field ‘Latest Forecast’

The datafield Latest Fcst is key for the visibility of a Forecast in the pipeline. The value of this datafield changes automatically, e.g. if you use the Forecasting Wizard, or if the Forecast gets approved.

Please **NEVER** set the Latest Forecast **manually** in the Forecast record.

Please always use the actions buttons and wizards.

Forecasts and Actuals
Bortezomib PSOIJ (413879) ||| AL Albania ||| 1 mg ||| Investment Forecast||| FA-2025-5839897

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Details Forecast Charts Sales By Year Forecast Extrapolation More ▾

Key Details

Forecast Region	Europe	Forecast Probability	100,0 %
Forecast Country	AL Albania	Forecast Risks	Supply
Forecast Type	Investment Forecast	Latest Fcst	Yes
Forecast Launch Year (num)	2.030	Combined Risk Factor	70,0 %

Relevant only for users with Personas:

- Global Portfolio Operations
- Local End-to-End Portfolio
- Regional Portfolio Europ

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Value ‘zero’ in Forecasts

Unfortunately, there are certain datafields which may **NOT** be **ZERO**, otherwise the upload of a forecast fails.

Please instead use 1% instead of zero.

Datafields on **Channel Strengths With Pack Sizes**

- Total Market Units MAT-01
- Launch CY Discount
- Launch CY Gx Penetration
- Launch CY SDZ Market share
- Market Growth until Launch
- Launch CY Market growth

Datafields on **CDL Channels**

- Gx Penetration Launch Yr
- SDZ Market share (GX) Launch Yr
- Discount Launch Yr Entry

Channel Strengths With Pack Sizes which may not be zero

Channel Strengths With Pack Sizes
10 *[10 (50 mg TAB)||BL Blister||pcs]

Assumptions (Cal Yr) Assumptions (12 Mon Ro

Market assumptions **on Calendar Year basis** used to calculate

▼ Market development before launch

Total Market Units MAT-01	22.324
Market Growth until Launch	19,00 %

Channel Strengths With Pack Sizes
10 *[10 (50 mg TAB)||BL Blister||pcs]

▼ Gross to Net Discount (Calendar Yr)

Launch CY Discount	30,0 %
1st CY Discount	

Total Market Units MAT-01
Launch CY Discount
Launch CY Gx Penetration
Launch CY SDZ Market share
Market Growth until Launch
Launch CY Market growth

Channel Strengths With Pack Sizes
10 *[10 (50 mg TAB)||BL Blister||pcs]

▼ Gx Penetration (Calendar Yr)

Launch CY Gx Penetration	50,0 %
2nd CY Gx Penetration	50,0 %
4th CY Gx Penetration	50,0 %

▼ SDZ Market Share (Calendar Yr)

Launch CY SDZ Market share	52,0 %
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Channel Strengths With Pack Sizes
10 *[10 (50 mg TAB)||BL Blister||pcs]

▼ Market development before launch

Total Market Units MAT-01	22.324
Market Growth until Launch	19,00 %

▼ Market development after launch (Calendar Yr)

Launch CY Market growth	5,0 %
2nd CY Market Growth	5,0 %
4th CY Market Growth	5,0 %

CDL Channel datafields which may not be zero

Gx Penetration Launch Yr

SDZ Market share (GX) Launch Yr

CDL Channel
Sandoz Retail branded Non-Tender (PH)

▼ Gx Penetration & SDZ Market Share

GX Penetration Launch Yr i	SDZ Market share (GX) Launch Yr i
GX Penetration Yr 1 i	SDZ Market share (GX) Yr 1 i

Discount Launch Yr Entry

CDL Channel
Sandoz Retail branded Non-Tender

▼ Gross to Net Discount

Discount Launch year i
Discount Y1 i

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Locale issue

If the locale settings of your Windows account and SANITY do not match, the price and date figures might get formatted differently, ultimately leading in failure during the forecast upload.

To overcome, please adjust your locale in SANITY:



[How to fix the locale issue.pdf](#)

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Why can't I create a NEW Forecast?

If you want to create a **NEW** forecast, then make sure, that the field **Latest Fcst** is not in 'Needs Review'.

How the system works:

Latest Fcst: Needs Review

Any uploads of new forecasts for same country will result in **overwriting** the current forecast.

There is no need to delete the existing Forecast in order to overwrite it.

Forecasts and Actuals
Bortezomib PSOIJ

Details	Forecast Charts	Sales By Year	More ▾
▼ Key Details			
Forecast Region APMA	Forecast Probability 65,0 %	Forecast Risks	
Forecast Country SA Saudi Arabia			
Forecast Type Pipeline View Non-Risk Adjusted	Latest Fcst	Needs Review	

Latest Fcst: Yes, No

Any uploads of new forecasts for same country will result in creation of a **NEW** forecast.

Forecasts and Actuals
Bortezomib PSOIJ

Details	Forecast Charts	Sales By Year	More ▾
▼ Key Details			
Forecast Region APMA	Forecast Probability 65,0 %	Forecast Risks	
Forecast Country SA Saudi Arabia			
Forecast Type Pipeline View Non-Risk Adjusted	Latest Fcst	Yes	

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I just tried to upload a Forecast and can't find it. Why?

If you try to upload a forecast, if an existing one has **Latest Fcst = In Approval**, then the upload fails, and currently you do NOT get any error message.

The SANITY team is working on resolving this challenge.

Please upload forecasts only with Latest Fcst in

- Needs Review
- Yes
- No

Latest Fcst: In Approval

Upload fails. Do not upload any FC, if there is another one In Approval.

Forecasts and Actuals
Bortezomib PSOIJ

Details Forecast Charts Sales By Year More ▾

Key Details

Forecast Region APMA	Forecast Probability 65,0 %
Forecast Country SA Saudi Arabia	Forecast Risks
Forecast Type Pipeline View Non-Risk Adjusted	Latest Fcst In Approval

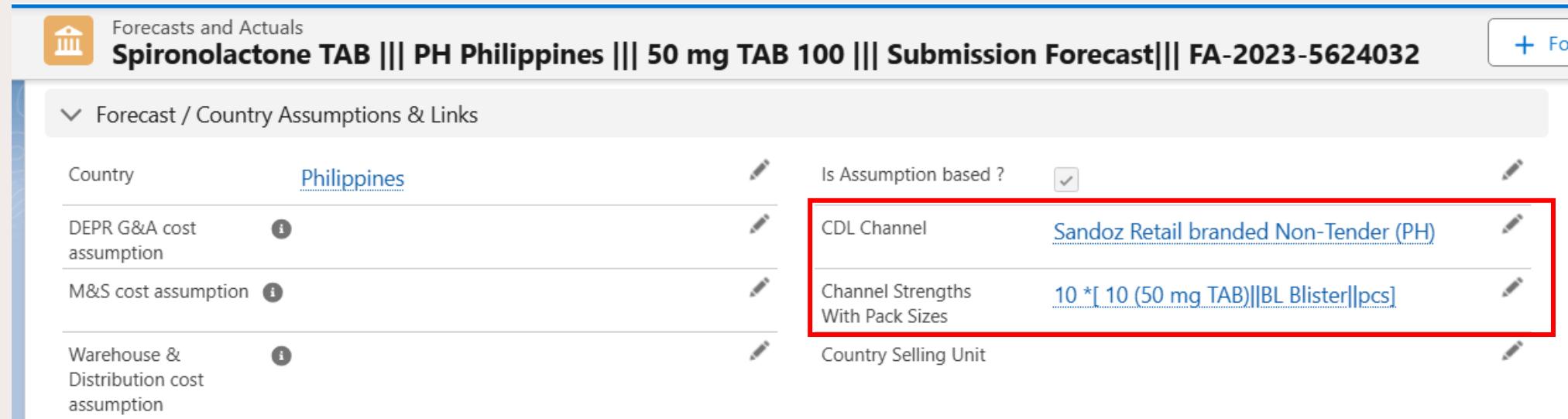
Uploading a Forecast

A pre-requisite to upload a forecast is the availability of these records:

- CDL Channel and
- Channel Strengths With Pack Sizes.

You can find information about the 2 record types here:

 [Changes in Bottom-Up Forecasting Process.pdf](#)



Forecasts and Actuals
Spironolactone TAB ||| PH Philippines ||| 50 mg TAB 100 ||| Submission Forecast||| FA-2023-5624032

Forecast / Country Assumptions & Links

Country	Philippines	Is Assumption based ?	<input checked="" type="checkbox"/>
DEPR G&A cost assumption	i	CDL Channel	Sandoz Retail branded Non-Tender (PH)
M&S cost assumption	i	Channel Strengths With Pack Sizes	10 *[10 (50 mg TAB) BL Blister pcs]
Warehouse & Distribution cost assumption	i	Country Selling Unit	

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Fast Track Selection

SANITY offers the possibility for a **Fast-Track-Selection**.

Following pre-requisites need to be fulfilled:

- Field GPC Selection Key Counter = false
(you can find this on the Country field of the CDL)
- The linked Project & Launch Management (PLM) is in project phase:
 - None
 - In Development
 - In Registration

(You can use the Fast-Track Selection also, if no PLM is linked)
- The CDL needs to have
 - at least 1 Forecast with Latest Fcst = yes
 - At least 1 strength
 - ComOps interest = yes
- The Selection Date on CDL must be empty

More information is available in



[Fast Track Selection.pdf](#)

The screenshot shows a software interface for managing a portfolio project. At the top, it displays 'Portfolio Project Spironolactone TAB (100636)' with a 'Follow' button. Below this, there's a summary card with 'Project Status: Finished' and 'Product Class: Gx'. A progress bar indicates the project is 'Finished'. The main area has tabs for 'Details', 'BD & PLM', and 'Str'. Under 'Details', there are fields for 'Project Status' (set to 'Finished'), 'Selection Source' (with an info icon), 'Product Class' (set to 'Gx'), and 'Product Source' (set to 'BD&L'). To the right, a context menu is open with various options like 'Edit', 'Create Project Selling Units', etc., and the 'Initiate Fast track Selection' option is specifically highlighted with a red border.

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