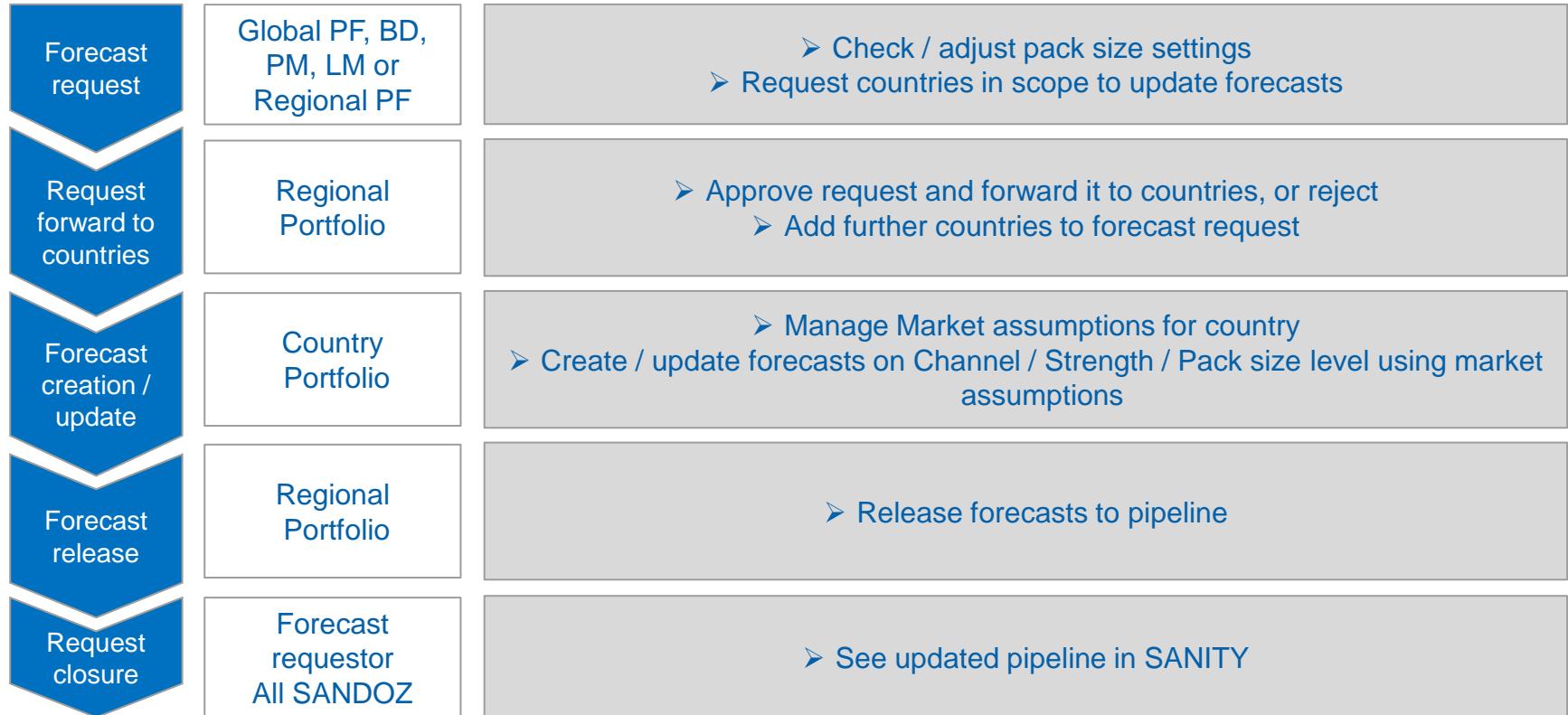




# **Assumption based forecasting. Requesting forecasts.**

Sept 2022

# Bottom-up forecasting process steps



# Focus: initiating forecast request

Forecast  
request

➤ Check / adjust pack size settings  
on Project Strengths

➤ Request countries in scope  
to update forecasts

- Make sure all pack sizes, types and units are defined correctly for each project strength
- When creating forecasts, pack sizes can be selected from the pre-defined set
- If additional pack sizes are needed, Country portfolio will need to request their creation by Regional portfolio, Project or BD deal manager.
- Initiate Forecast request from Portfolio Project, BD Deal, PLM or Selection Opp DD
- Request forecast updates for all countries in scope, or part of them
- See the progress of your Forecast update request

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# How to request a forecast update (1/4)

Portfolio Project

Portfolio Project

+ Follow Change Owner Edit Create BD Deal Create Project & Launch Mgmt Discontinue Portfolio Project Request Forecast Update Delete Approve IP Owner

Project Status: Active Product Class: Gx Therapeutic Area: CVM Product Target: Xarelto Selected Product Target: Xarelto

Discontinued Under consideration On Hold Active Finished Not maintained

BD Deal

Portfolio Project Strengths: 500 mg Governance Stage: 4) Partner Selected Net Sales Value (Reportable): USD 10,323,205.00 Agreement signature date (reporting): 27/07/2022 Project & Product Links: Project // Product

Related Details

BD Deal Full Name: BD Manager for BD Deal Process

Activity Chatter Log a Call New Task

PLM

+ Follow Request Forecast Update Edit Create MC Project Request Feedback Change Owner Printable View

Overall Traffic Light: Green Active Pre-Launch Countries: 3 Launched Countries: 0 Country Status Blank: 1 Interest Stage Blank: 5 Country Stages: Tentative approval / IP Hold, In Registration, Approved, In Evaluation,

Details Team & Risks Budget & BD Supply Chain Countries & Fcssts Study & Reg News & Escalations More

Portfolio Project: Project & Launch Mgmt Name: In Development

<< Top Project >>

1

Find a Forecast request button on your Portfolio Project, BD Deal or PLM record and click it



If you don't see this button, contact your SuperUser!

# How to request a forecast update (2/4)

Please choose countries to request a forecast update. The below list displays countries that are active within the project / BD deal.

\*Regions  
NAmer

United States

Select All Unselect All

Next

2

Select regions one by one, and define countries that should be included into your request in each region.  
You will only see countries that are in the scope of your project / BD deal.

3

Click „Next“ when you have selected all the regions you were planning to select.

# How to expand the forecast request to countries not included into the Project / BD deal

Follow the screens to first add countries that are included into the Portfolio Project, but not included into your BD Deal / PLM record (included discontinued CDLs)...

Regions  
Other

Extend your forecast request to further Portfolio Project countries, or click "Next" if no extension is required.

Burundi Discontinued

Cape Verde Discontinued

Select All Unselect All

Next

... And then add countries that are not included into the Portdolio project.

Regions  
Europe

Extend your forecast request to countries that are not included into the Portfolio Project (click "Next" if no extension is required).

Georgia

Germany

Select All Unselect All



These countries will be added to the Portfolio Project with the Interest status „Project candidate“ and can then be included into a selection process as needed.

# How to request a forecast update (3/4)

You have chosen the following countries to request New / Updated forecasts. Please click "next" to proceed or "back" to update the countries.

Region	Country
Europe	Austria
Europe	Belarus
LATAM	Colombia
Europe	Cyprus
APMA	Hong Kong
APMA	Jordan

[Back](#) [Next](#)

4

Review your choice. Click „Back“ if you want to change something, and „Next“ if you are happy with the countries you selected.

# How to request a forecast update (4/4)

\* Please select the forecast request reason

\* Please provide any additional comments that should be part of this request

\* Please provide a due date for this forecast request  
 

Please click below to upload any new file which is not already available that would support the forecast update. Your file will be saved to the record this request was requested from, and will also be visible on the regional forecast request records.

  Or drop files

If you are ready to proceed with Forecast Request creation, please click "Finish". This will create Forecast requests.

**5** Select the reason for your forecast request and provide any additional information that would help users to process your request.

**6** The default due date for your forecast request is set to 45 days, but can be changed.

**7** You can upload one or more files that would help users to process your update request. These files will be accessible on the record where you initiated your Forecast request (Portfolio Project, BD Deal, PLM).

**8** Click „Finish“ when you are ready.



# Monitor your forecast update requests

The screenshot shows a software interface for managing a portfolio project. At the top, there's a header bar with various buttons like 'Follow', 'Change Owner', 'Edit', etc. Below the header, the project details are listed: Project Status (Active), Product Class (Gx), Therapeutic Area (CNS), Product Target (Methylphenidate hydrochloride PRCH (416463)), Originator Product Name (Medikenet adult), and Selected Product Target (Methylphenidate hydrochloride PRCH (416463)). A progress bar indicates the project status: Discontinued, Under consideration, On Hold, Active (highlighted in blue), Finished, and Not maintained. Below the header, there are tabs for 'Details', 'BD & PLM', 'Str & Packs', 'Country Detail', 'Forecasts', 'Selections & Escalations', and 'Quip'. A large blue callout box contains the following text:  
One Forecast for each region will be created.  
For NAmer, separate requests will be created for Canada and US.  
Regional Portfolio is now ready to start managing their regional Forecast requests.

On the right side, there are two panels. The top panel is titled 'Forecast Requests' and shows two entries: 'Req 202210-00069' (Region: Europe, Due date: 19/11/2022, Status: In Progress) and 'Req 202210-00084' (Region: Europe, Due date: 25/11/2022, Status: Initiated). The bottom panel is titled 'P&L Mgt' and has sections for 'Overview', 'Snapshot', 'Fcst Sales', 'Fcst Volume', and 'More'. The 'Forecast Details' section displays data such as Forecast First Launch Year (2024), Forecast Sales (Current Total L+5) (USD 22.122.328.00), Fcst Sales Pipeline (Curr Total L+5) (USD 22.122.328.00), Forecast Sales (Current Total L+10), and Fcst Sales Pipeline (Curr Total L+10).

# Understand the details of a Forecast request (1/2)

Forecast Request

Forecast Request Name: Req-202207-00043      Initiated from: PLM      Status: Initiated      Created By: Natalia Kuehnert, 26.07.2022 09:25

Before forwarding this request to countries, please make sure that all the required project strength & pack size combinations are available. Click on the "Project Strengths & packs" tab to check.

Details    Files    Project Strengths & Packs

Region	NAmer	Country	US
Additional information	test		

▼ Details

Status	Initiated	Forecast request reason	Launch commitment
Due date	09.09.2022	Initiated from	PLM

▼ Links

Business Development Deal	Project & Launch Management
Portfolio Project	

Created By: Natalia Kuehnert, 26.07.2022 09:25

Owner: Regional Portfolio US

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Region indicates the region of this forecast request is addressed to. Country field is only populated for NAmer region, to indicate if the request was created for US or Canada.

Status field indicates the status of this forecast request. Following values are available:

Status	Explanation
Initiated	Regional PF has not yet started to work on this request
In Progress	Forecast request was forwarded for at least one country
Fulfilled	Forecasts have been created and released for all the countries to which the forecast request was forwarded.
Rejected	Forecast request was rejected for all countries
Cancelled by requestor	Request has been cancelled

Owner indicates the user who is responsible for completing this forecast request. Initially, forecast requests are assigned to a regional queue; Regional portfolio managers assign the request to themselves when they start working on it.

# Understand the details of a Forecast request (2/2)

The screenshot shows a user interface for managing forecast update requests. At the top, there is a navigation bar with buttons: Assign to me, Manage Forecast Request, Sharing Hierarchy, Delete, Edit, Clone, Sharing, New Task, and Change Owner. Below the navigation bar, a message says "for selection under the connected Portfolio Project." The main area displays a list titled "Country FC update requests (1)". The list contains one item: "Country FC update request: CDL Reo Link" (status: Pending). An arrow points from this row to the "Pending" status entry in the table below. Below the list, there is an "Activity" section with a "New Task" button and a "Create a task..." input field. At the bottom, there is a section titled "Upcoming & Overdue" with a message: "No activities to show. Get started by sending an email, scheduling a task, and more." and another message: "No past activity. Past meetings and tasks marked as done show up here."

In the top right section, you see the status of the Forecast update request country by country. Following status value are available:

Status	Explanation
Pending	not yet forwarded to country by Regional PF
Forwarded	Regional PF has forwarded the request to this country
Rejected	Regional PF has rejected the forecast request for this country
Pending approval	Forecasts have already been created and are pending approval by Regional Portfolio
Fulfilled	Forecasts have already been released for this country by Regional Portfolio
Cancelled	Request has been cancelled

**Thank you**