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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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DetailsForecast ChartsSales By YearForecast ExtrapolationMore ▾

▼ 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 %

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 %


7 Business Use Only

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# 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 ⓘ

GX Penetration Yr 1 ⓘ

SDZ Market share (GX) Launch Yr ⓘ

SDZ Market share (GX) Yr 1 ⓘ

Discount Launch Yr Entry

CDL Channel

**Sandoz Retail branded Non-Tender**

▼ Gross to Net Discount

Discount Launch year ⓘ

Discount Y1 ⓘ



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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 Country SA Saudi Arabia	Forecast Risks ⓘ
Forecast Type Pipeline View Non-Risk Adjusted	Latest Fcst ⓘ <b>Needs Review</b>

## Latest Fcst: Yes, No

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

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**Bortezomib PSOIJ**

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Forecast Region APMA	Forecast Probability ⓘ 65,0 %
Forecast Country SA Saudi Arabia	Forecast Risks ⓘ
Forecast Type Pipeline View Non-Risk Adjusted	Latest Fcst ⓘ <b>Yes</b>

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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 ▾

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


# 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

+ Fol

Forecast / Country Assumptions & Links

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

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# Fast Track Selection

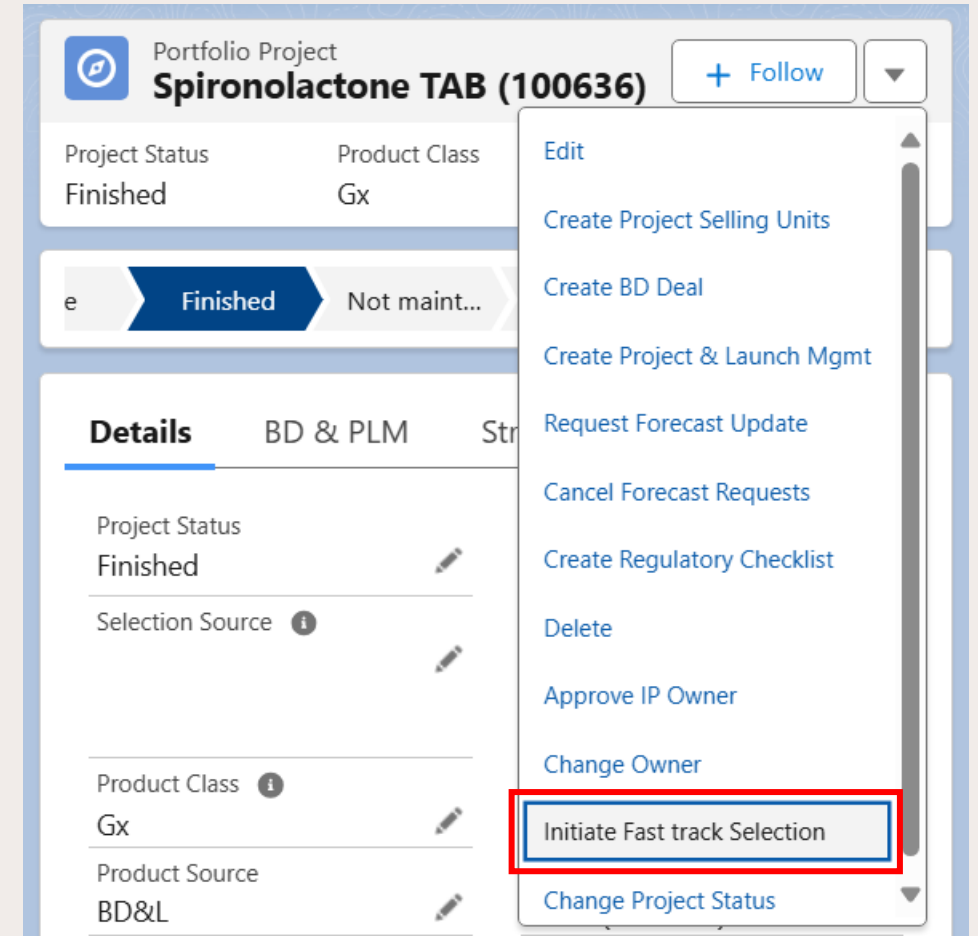
SANITY offers the possibility for a **Fast-Track-Selection**.

Following pre-requisites need to be fulfilled:

- Field GPC Selection Key Countre = 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](#)



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