

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.

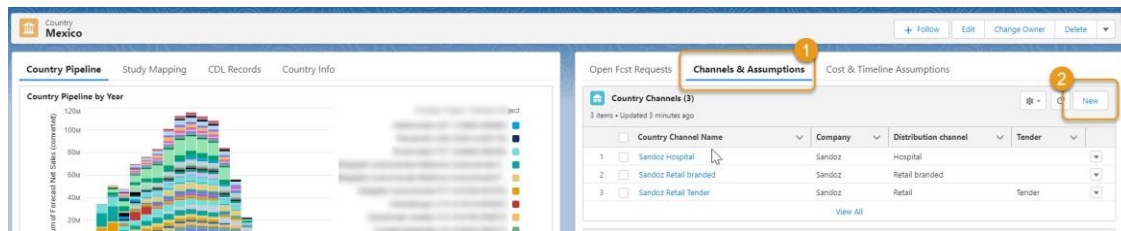
Manage Standard Assumptions in your Country

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!



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.

Information

*Country Channel Name: Calculated upon creation

Country: Mexico

Owner: Natalia Kuehnert

Company: Sandoz

Distribution channel: --None--

Tender: --None--

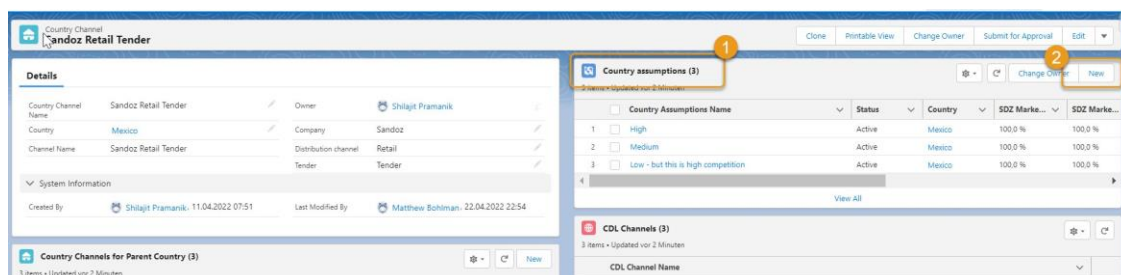
Buttons: Cancel, Save & New, Save

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).



This screenshot shows the 'New Country Assumptions' form. The form is divided into several sections: 'Information', 'Therapeutic area', 'Level of competition', 'GX Penetration', and 'SDZ Market share'. Numbered callouts (1-7) highlight specific fields and sections:

- 1: Therapeutic area dropdown menu.
- 2: Level of competition dropdown menu.
- 3: Status dropdown menu.
- 4: Country search field.
- 5: Country Channel dropdown menu.
- 6: Assumptions Name field.
- 7: The entire 'GX Penetration' and 'SDZ Market share' section.

The 'GX Penetration' section includes fields for 'GX Penetration Launch Yr' and 'GX Penetration Yr 1' through 'GX Penetration Yr 10'. The 'SDZ Market share' section includes fields for 'SDZ Market share (GX) Launch Yr' and 'SDZ Market share (GX) Yr 1' through 'SDZ Market share (GX) Yr 10'. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

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.

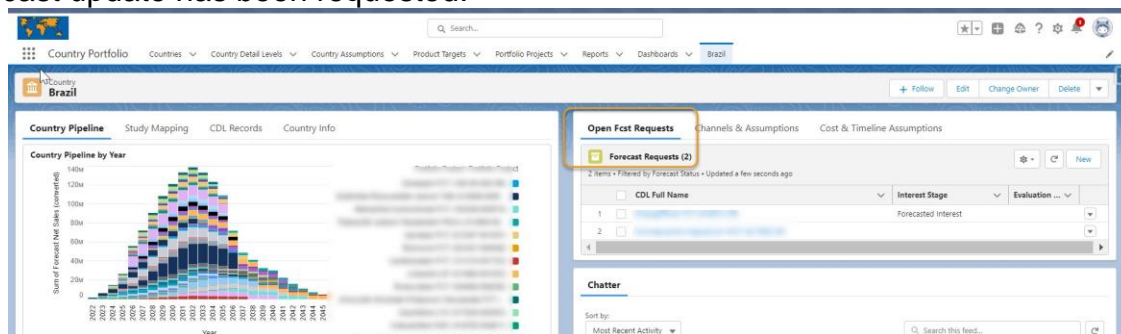
- If you are creating an assumption set for Tender projects that have a shorter lifetime than L+5, explicitly put 0% in the fields for the missing years.

Don't forget to click on “Save”.

Get a forecast Request

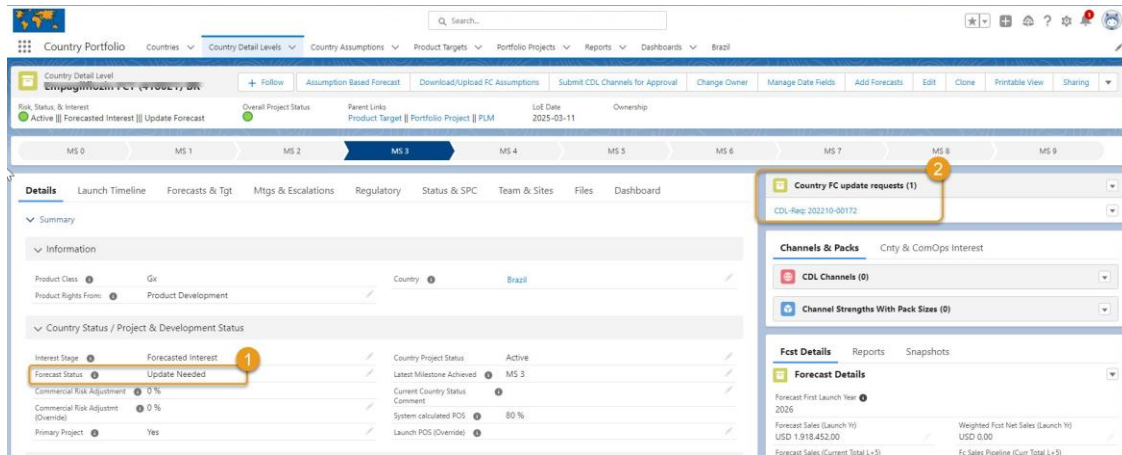
How do I get to know that I need to create or update a forecast?

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)

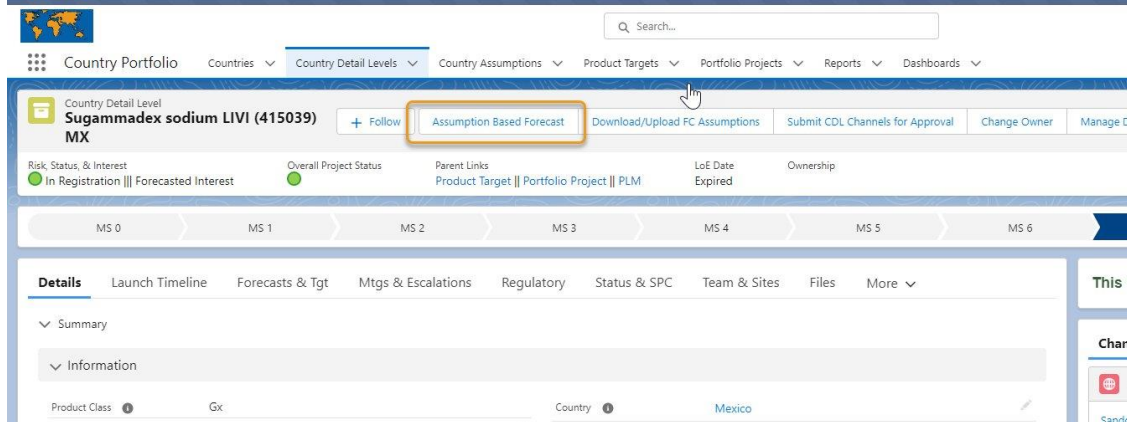


Create an Initial Bottom-Up Forecast

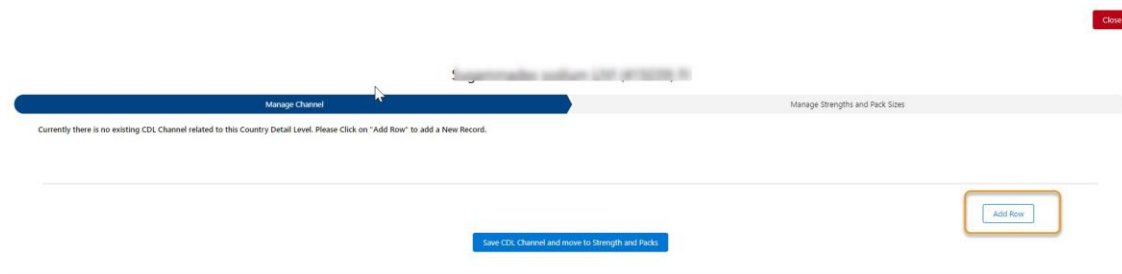
Create a set of Channel, Strength and Pack Size combinations to use in forecasting

Initiate creation of Channels

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



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



☒ Active

* Country Channel ⓘ

Select

Sandoz Hospital Tender

Sandoz Retail Tender

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).

Note: Existing 12 month rolling assumptions on the channel will be deleted if methodology is changed from 12 months rolling to Calendar year.

Manage Channel | Manage Strengths and Pack Sizes

* Country Channel ¹
☒ Active
 Sandoz Hospital Tender

* Country Channel ¹
☒ Active
 Sandoz Retail Tender

Country Assumptions ¹
 Patient Launch

Select
 LQR
 Patient Launch

Assumption Methodology ²
 12 month rolling

Assumption Methodology ²
 Select

Save CDI Channel and move to Strengths and Packs

Add Row

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)

The screenshot shows two dropdown menus side-by-side. The first is labeled 'Country Assumptions' and has a 'Select' option. The second is labeled 'Assumption Methodology' and has two options: '12 month rolling' and 'Calendar year'. A hand cursor is pointing at the '12 month rolling' option. Below the dropdowns is a blue button that says 'Save CDL Channel and move to Strength and Packs'.

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

The screenshot shows the 'Manage Channel' section of the interface. It has a header bar with 'Manage Channel' and 'Manage Strengths and Pack Sizes'. Below the header is a note: 'Note: Existing 12 month rolling assumptions on the channel will be deleted if methodology is changed from 12 month rolling to Calendar year.' There is a table with two rows. Each row has an 'Active' checkbox, a 'Country Channel' dropdown, a 'Country Assumptions' dropdown, and an 'Assumption Methodology' dropdown. The first row has 'Sandoz Hospital Tender' for Country Channel, 'Patent Launch' for Country Assumptions, and '12 month rolling' for Assumption Methodology. The second row has 'Sandoz Retail Tender' for Country Channel, 'Select' for Country Assumptions, and 'Select' for Assumption Methodology. A hand cursor is pointing at the 'Sandoz Retail Tender' option. Below the table is a blue button that says 'Save CDL Channel and move to Strength and Packs'.

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 ch

✓ Active Country Channel Sandoz Hospital Tender

✓ Active Country Channel Sandoz Retail Tender

Add Strengths and Pack Size combinations

Select one of the Channels and click “Next”.

CDL Channels

☒ Sandoz Hospital Tender

☐ Sandoz Retail Tender

Next

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

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.

Add Row

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

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"/>	(500 mg) / 5 ml	VI Vial @ 5	10	10	25.07.2023	Select	EUR	100.00 %	No

[Add Row]

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.

Sugammadex sodium LIVI (415039) FI

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"/>	(500 mg) / 5 ml	VI Vial @ 5	10	10	25.07.2023	Select	EUR	100.00 %	No
<input checked="" type="checkbox"/>	(500 mg) / 5 ml	VI Vial @ 5	1	1	25.07.2023	Select	EUR	100.00 %	No
<input checked="" type="checkbox"/>	(200 mg) / 2 ml	VI Vial @ 2	5	5	25.07.2023	Select	EUR	100.00 %	No
<input checked="" type="checkbox"/>	(200 mg) / 2 ml	VI Vial @ 2	10	10	25.07.2023	Select	EUR	100.00 %	No

[Add Row]

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]

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?

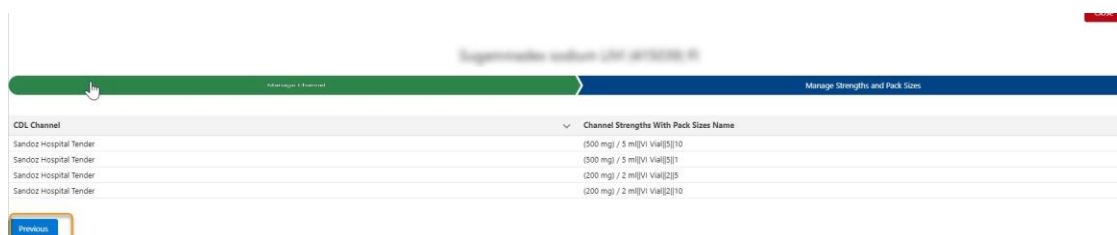
As long as you haven’t saved your Strength and Pack Size combinations, you can delete them by clicking on the “trash bin” icon on the right. Once you saved them, you will need to deactivate them. For this, come back to this wizard and unclick the “Active” checkbox on the left (6).

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).



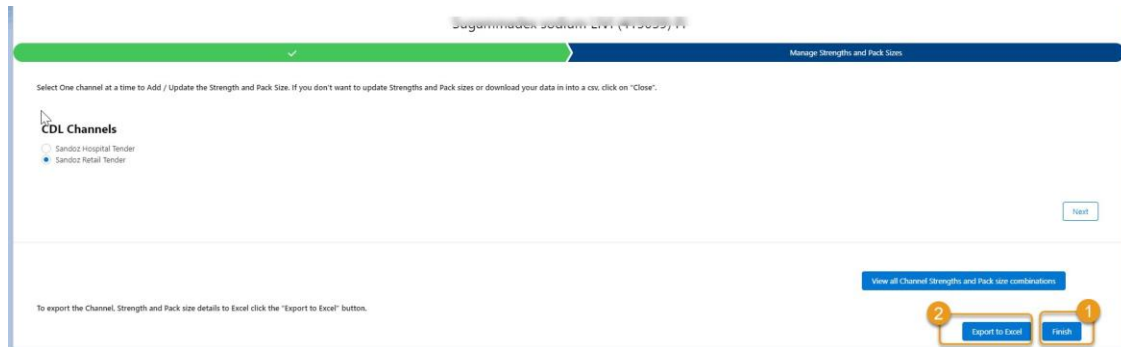
Click “Previous” to return to the wizard.



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.

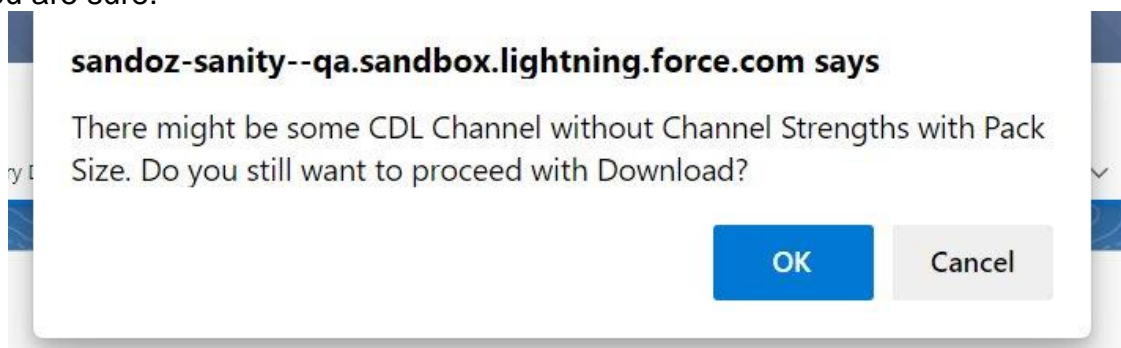
Depending on the amount of data you need to add to create a forecast it's advisable to either add the missing data directly in the system, or use the SANITY Excel download-upload tool. You can review your created Channel Strength and Pack Size combinations in SANITY (you can still use the Excel tool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

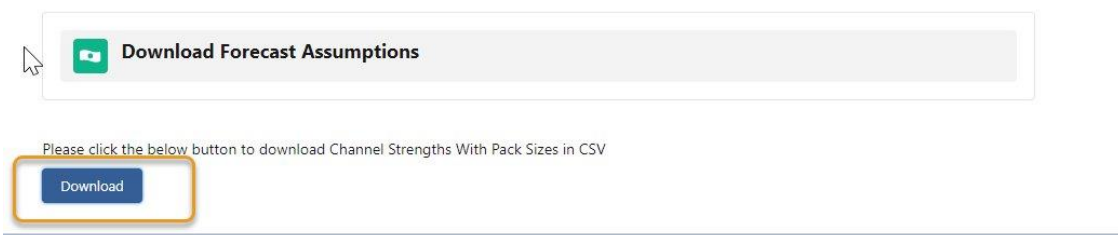


Check the “Download Channel Strengths with Pack Sizes in CSV” checkbox and click “next”.

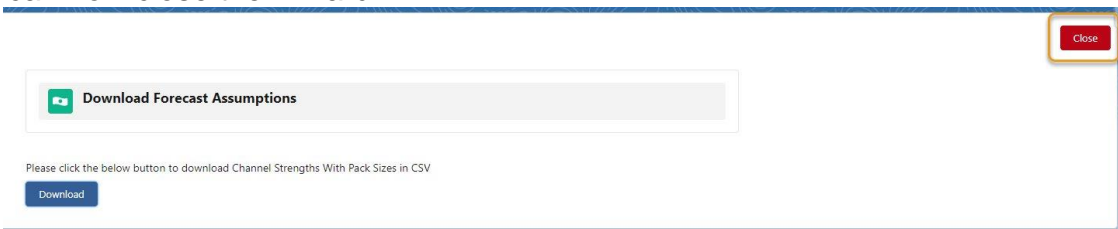


*Select a choice from below and click next
☒ Download Channel Strengths With Pack Sizes In CSV

Click “Download”.



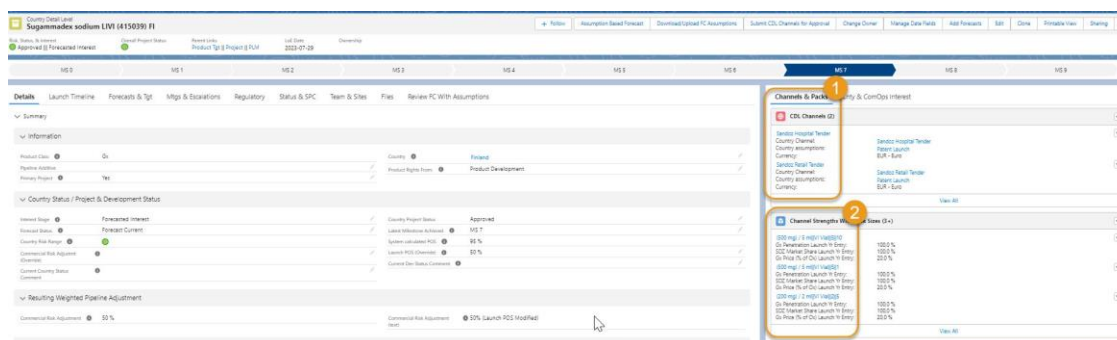
You can now close the Wizard.



Finalize your forecast draft directly in Salesforce

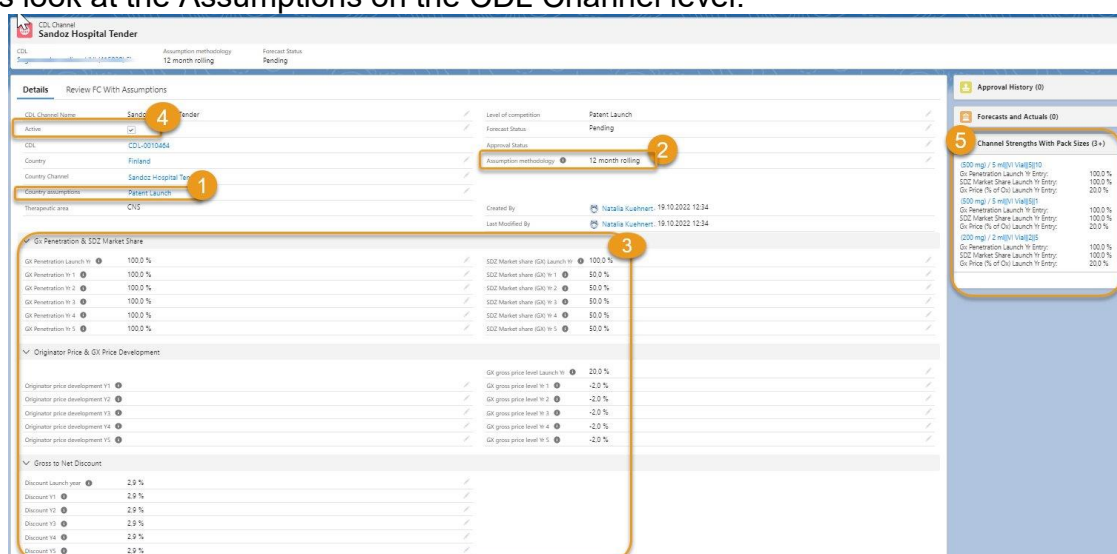
We strongly advise this path for projects with only 1-2 Strength and Pack Size combinations that use standard assumptions - it will take you significantly less time than using excel!

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.

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
 150 (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 assumption based forecast".

✓ 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	

✓ 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	100.0 %		

✓ 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	50.0 %		

✓ 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.

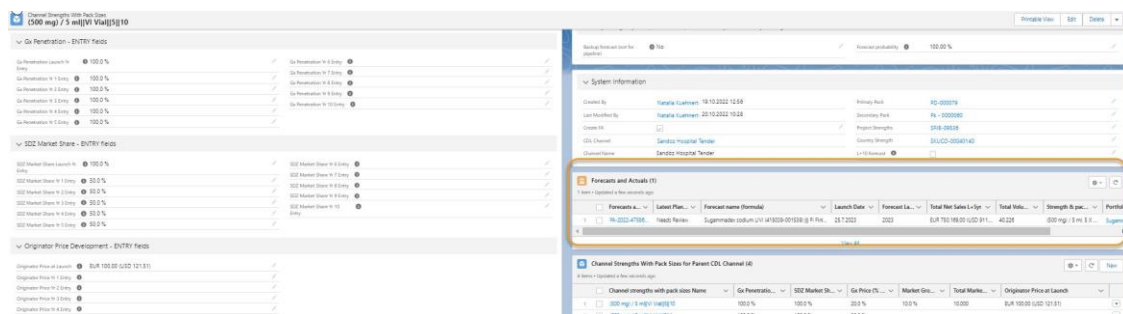
The data structure allows to add assumptions for up to Launch + 10 years; however, fields for years 6-10 are not mandatory and can be left empty if you are forecasting for L+5.

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!

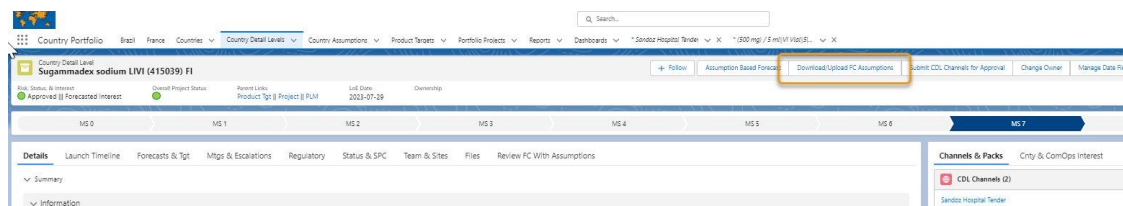
Your new forecast is in the “Needs review” status - this means it is considered a draft and is not part of any pipeline.



Finalize your forecast draft using excel downloader

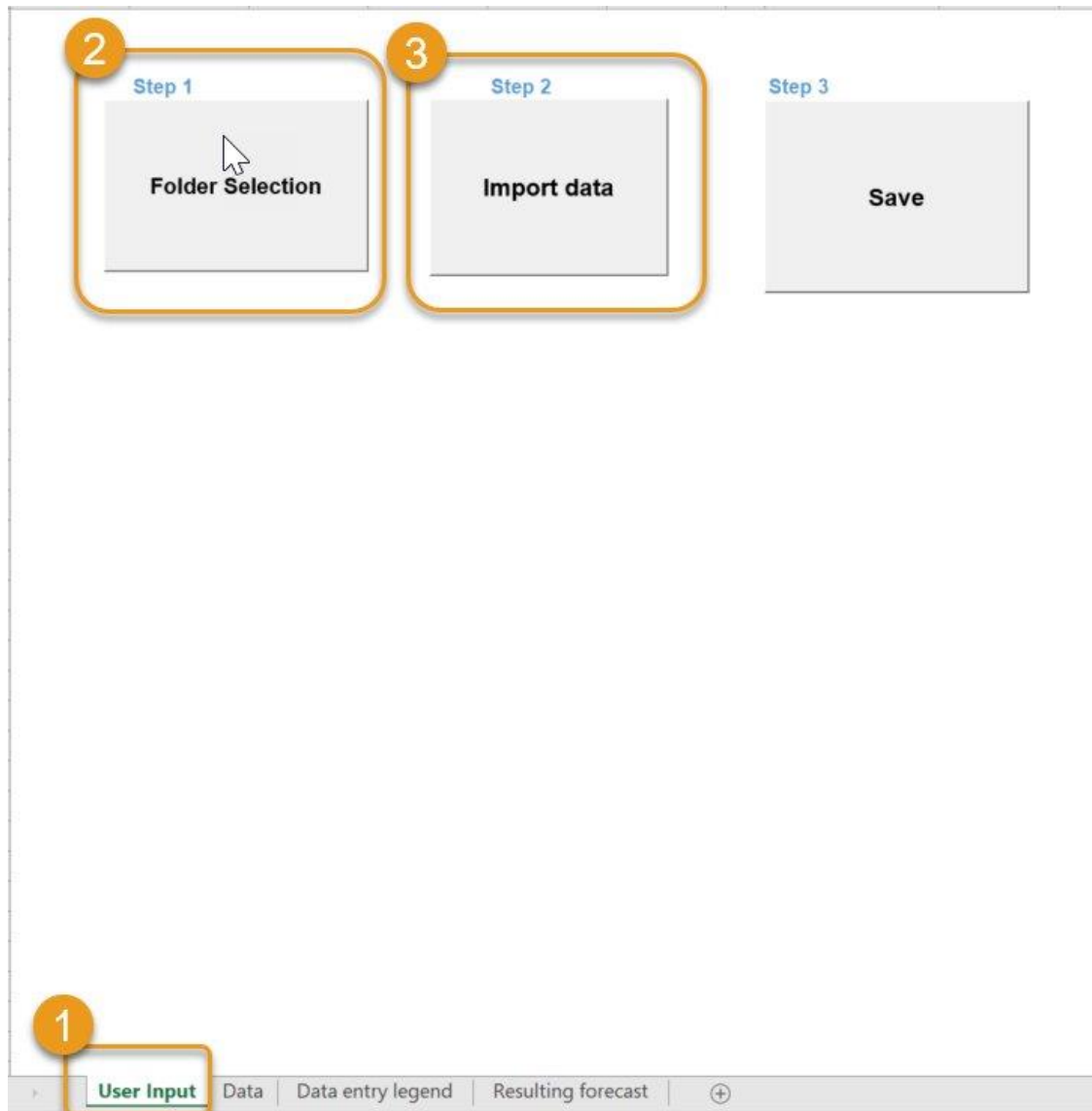
Download SANITY data and open it in the Forecasting Download-Upload tool

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.

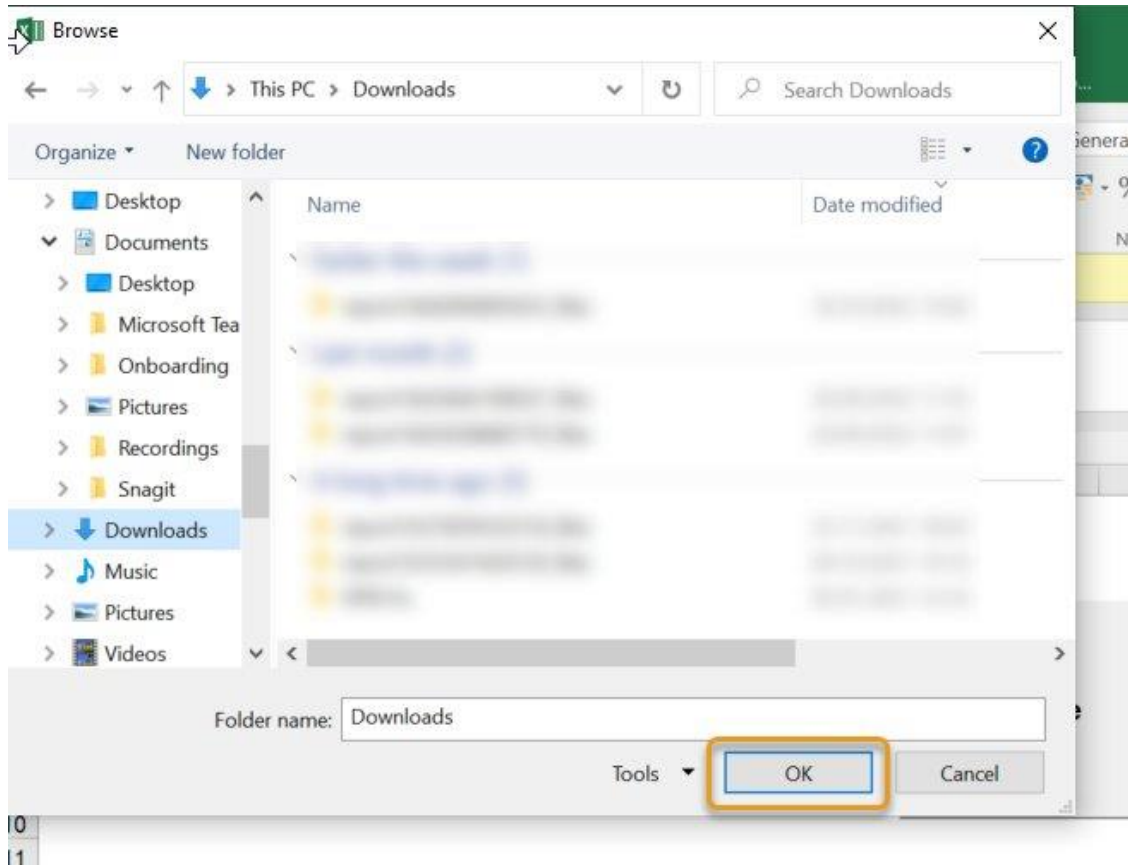


Open the Excel download-upload tool to adjust your assumptions (or the version of this document integrated into your internal excel template). Please download the Excel download-upload tool to your desktop in case you do not have it:

[SANITY FC Masterfile wCalculation.xlsm](#)



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.

	B	C	D	E	F	G	H	I	J	K	L	M
	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
1												
2	12 month rolling	Sandoz Hospital Tender (500 mg) / 5 ml Vial			5 ml		10	10	25.07.2023			
3	12 month rolling	Sandoz Hospital Tender (500 mg) / 5 ml Vial			5 ml		1	1	25.07.2023			
4	12 month rolling	Sandoz Hospital Tender (200 mg) / 2 ml Vial			2 ml		5	5	25.07.2023			
5	12 month rolling	Sandoz Hospital Tender (200 mg) / 2 ml Vial			2 ml		10	10	25.07.2023			
6												
7												
8												
9												
10												
11												
12												
13												
14												
15												
16												

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

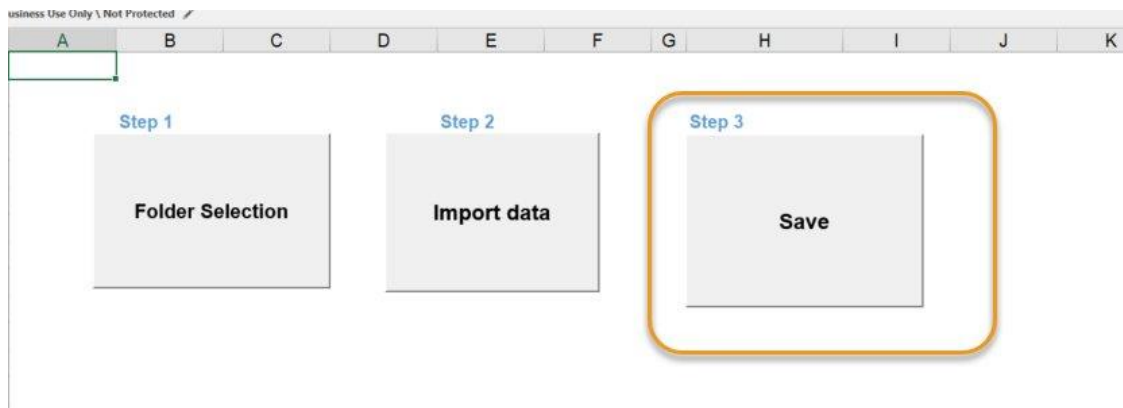
- Market Growth Launch Year
- Market Growth*
- GX Penetration*
- Market Share*
- Originator Price at Launch
- GX Price Level*
- Discount*

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

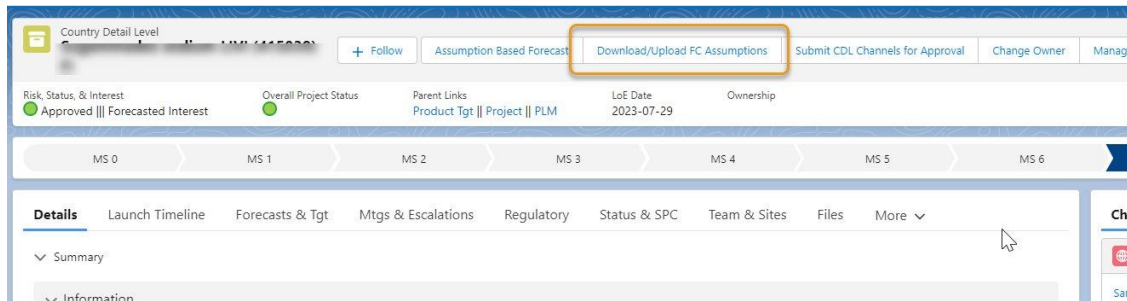
On the “Resulting forecast” tab, you will see the forecasts calculated from the assumptions you entered.



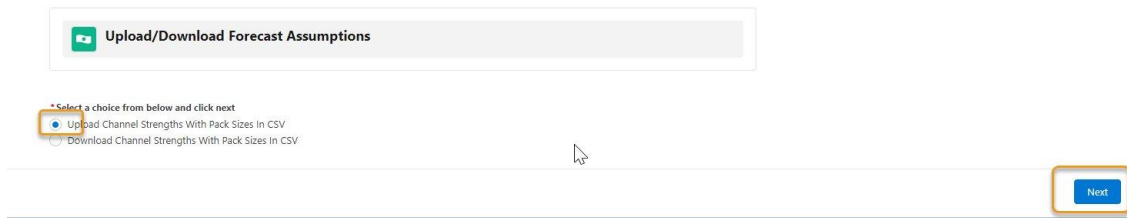
When you are happy with your data, go back to the “User Input” tab and click on “Save”. A Salesforce readable .csv file will be saved in the location you defined. You should name it in an easily identifiable way for when you upload it back to SANITY!



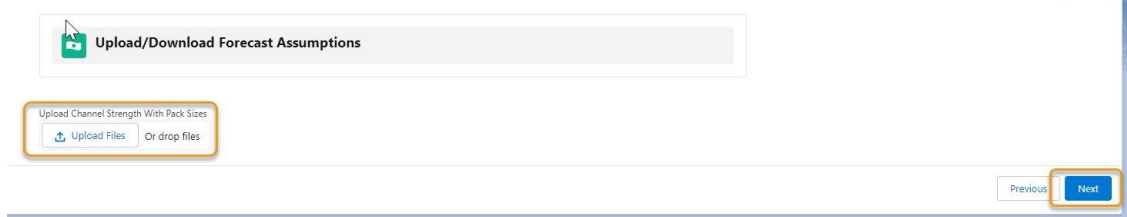
On your CDL, click on “Download / Upload FC Assumptions” to upload your csv back to SANITY.



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

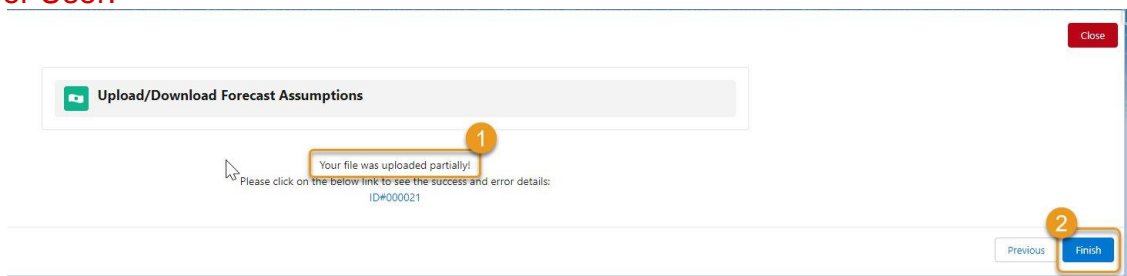


Upload your csv file and click “Next”:



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.



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 top screenshot displays the 'CDL Channel Sandoz Hospital Tender' record. It features a table with columns for 'Gx Penetration Launch Yr', 'Gx Penetration W', 'Gx Market share (SD) Launch W', and 'Gx Market share (SD) W'. The table lists various forecasts for different years and weeks, with status indicators like 'Needs Review' or 'In Approval'.

The bottom screenshot shows the 'Forecasts and Actuals' detail view for a specific forecast. It includes a 'Details' tab with sections for 'Key Details' and 'Forecast / Country Assumptions & Links'. The 'Key Details' section contains fields for 'Forecast Region', 'Forecast Country', 'Forecast Type', 'Forecast Launch Year (num)', 'Forecast Probability', 'Forecast Risk', 'Latest Planning Fcst', 'Combined Risk Factor', and 'Reason for Launch Delay'. The 'Forecast / Country Assumptions & Links' section includes 'Country', 'G&A cost assumption', 'M&S cost assumption', and 'Warehouse & Distribution cost assumption'. A 'Forecast Overview' chart is also visible on the right side of the detail view.

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.

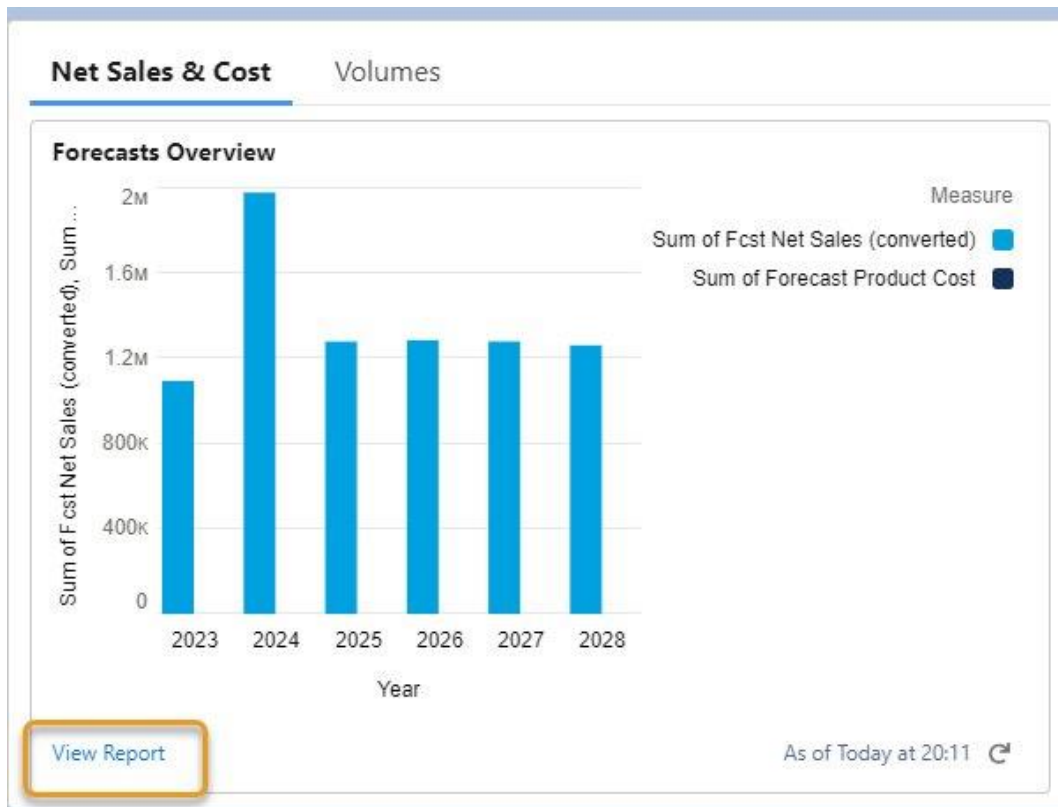
A checkbox (2) indicates that this forecast has been created based on market assumptions.

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 the 'Manage Channel' interface. At the top, there are two tabs: 'Manage Channel' (active) and 'Manage Strengths and Pack Sizes'. Below the tabs, a note states: 'Note: Existing 12 month rolling assumptions on the channel will be deleted if methodology is changed from 12 month rolling to Calendar year.' The main area contains two rows of assumptions. The first row is for 'Sandoz Hospital Tender' with 'Country Assumptions' set to 'Patent Launch' and 'Assumption Methodology' set to '12 month rolling'. The second row is for 'Sandoz Retail Tender' with 'Country Assumptions' set to 'Patent Launch' and 'Assumption Methodology' set to '12 month rolling'. A dropdown menu for 'Country Assumptions' is open, showing 'Patent Launch' (selected) and 'LGR'. A button 'Save CDL Channel and move to Strength and Packs' is visible at the bottom.

Click on “Finish” if 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 the 'Manage Strengths and Pack Sizes' interface. At the top, there are two tabs: 'Manage Channel' (inactive) and 'Manage Strengths and Pack Sizes' (active). Below the tabs, a note states: '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".' The main area contains a section 'CDL Channels' with two radio buttons: 'Sandoz Hospital Tender' (selected) and 'Sandoz Retail Tender'. A 'Next' button is visible. At the bottom, there are three buttons: 'View all Channel Strengths and Pack size combinations', 'Export to Excel', and 'Finish' (highlighted with a red 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”.

Manage Strengths and Pack Sizes

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

- Sandoz Hospital Tender
- Sandoz Retail Tender

Next

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

Strength	Primary Pack Size	Sec Pack Size	Total Pack Size	Launch Date	Max. Acceptable TPC	Currency	Forecast Probability	Backup Forecast
Active (300 mg) / 5 ml	VI Vial 5	10	10	25.07.2023	Select	EUR	100.00 %	No
Active (300 mg) / 5 ml	VI Vial 5	1	1	25.07.2023	Select	EUR	100.00 %	No
Active (200 mg) / 2 ml	VI Vial 2	5	5	25.07.2023	Select	EUR	100.00 %	No
Active (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 ⓘ Sandoz Hospital Tender
<input checked="" type="checkbox"/> Active	* Country Channel ⓘ Sandoz Retail Tender

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

25.07.2023

Up

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

Country Detail Level

+ Follow

Assumption Based Forecast

Download/Upload FC Assumptions

Submit CDL Channels for Approval

Risk, Status, & Interest

Overall Project Status

Parent Links

LoE Date

Ownership

Approved ||| Forecasted Interest

Product Tgt || Project || PLM

2023-07-29

MS 0

MS 1

MS 2

MS 3

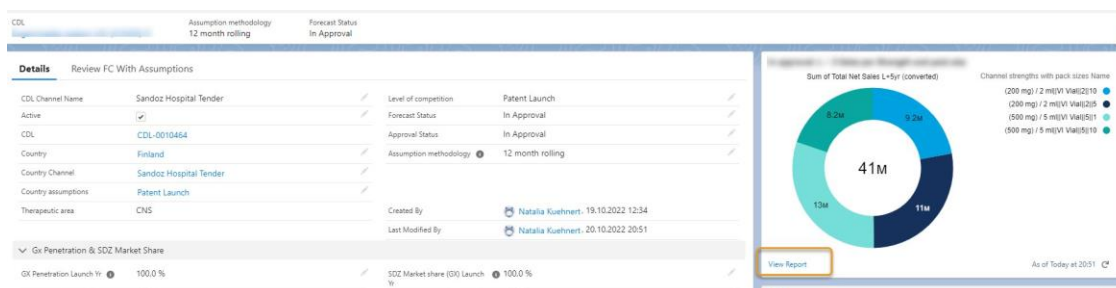
MS 4

MS 5

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

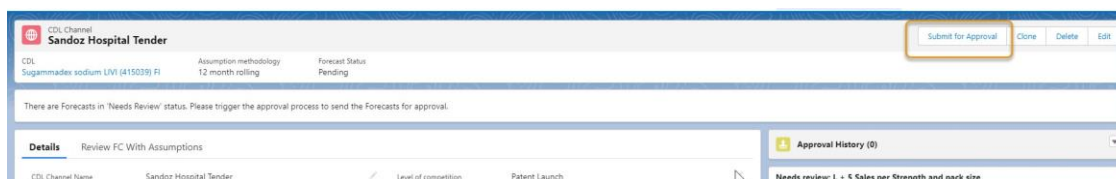


On the right side, you will find a pie chart showing the forecasted total sales number for your CDL Channel, grouped by Strength-pack size combinations. Click in “View report” to see all the assumptions for the channel and all the resulting forecast numbers in the tabular form.

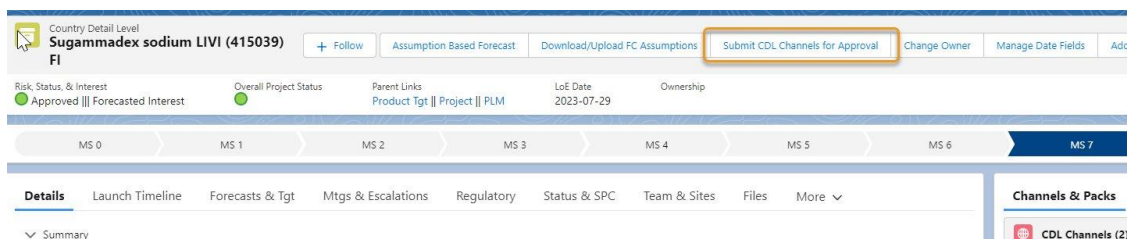
Submit Forecasts for Approval

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

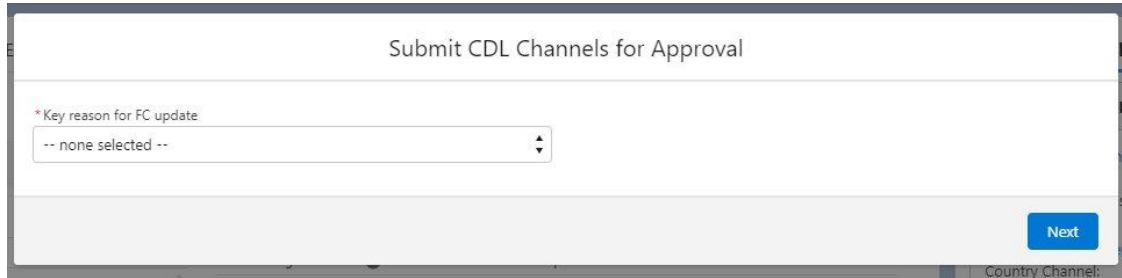
If you want to submit a single channel, click on “Submit for Approval” on your Channel record; forecasts for all Strengths and Pack Sizes under this channel will be submitted for regional portfolio approval.



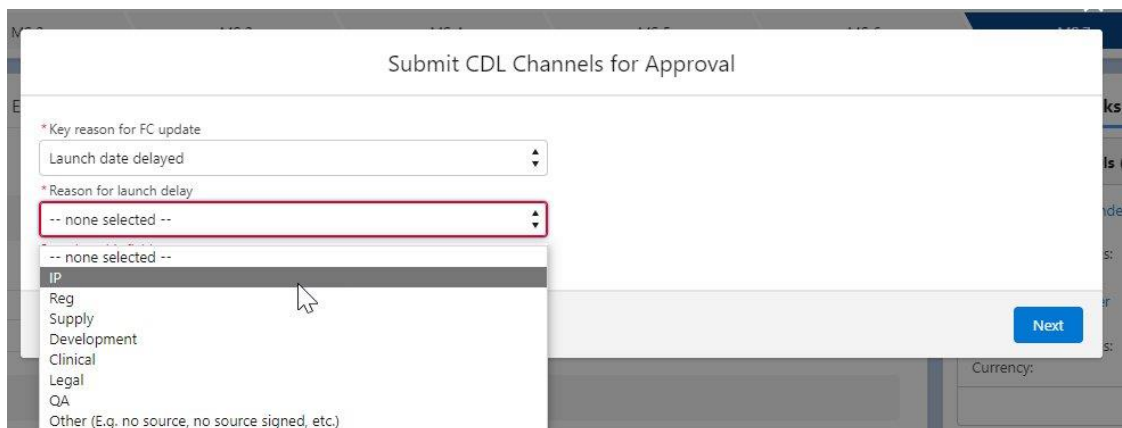
If you want to submit all channels together, go to your CDL record and click on “Submit CDL Channels for Approval”. All draft forecasts under the CDL will be submitted for approval.



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



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



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”.

Country Detail Level

[+ Follow](#) [Assumption Based Forecast](#) [Download](#)

Product Class	Gx	Country
Pipeline Additive		Product Right
Primary Project	Yes	

Country Status / Project & Development Status

Interest Stage	Forecasted Interest	Country Project
Forecast Status	Submitted for approval	Latest Milestone
Forecast to be updated by		System calculation
Country Risk Range		Launch POS (Date)
Commercial Risk Adjustmt (Override)		Current Development Status
Current Country Status Comment		

Resulting Weighted Pipeline Adjustment

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”.

Sandoz Hospital Tender

Originator price development Y1	OX gross price level launch Y1	OX gross price level Y1
Originator price development Y2	OX gross price level Y2	OX gross price level Y2
Originator price development Y3	OX gross price level Y3	OX gross price level Y3
Originator price development Y4	OX gross price level Y4	OX gross price level Y4
Originator price development Y5	OX gross price level Y5	OX gross price level Y5

Gross to Net Discount

Discount Launch year	2.9 %
Discount Y1	2.9 %
Discount Y2	2.9 %
Discount Y3	2.9 %
Discount Y4	2.9 %
Discount Y5	2.9 %

WIP

Gx Penetration Curve	Linear	Seasonality
Gx Penetration WIP (Forecast)		Forecast Launch Pattern
		W Monitor

View Report

As of Today at 21:17

Forecasts and Actuals (4)

FA-2022-4759621	Key reason for FC update:	Market dynamics
Total Net Sales L+5yr:	EUR 10,414,962.00 (USD 6,190,117.86)	
Latest Planning Fcst:	Yes	
FA-2022-4759622	Key reason for FC update:	Market dynamics
Total Net Sales L+5yr:	EUR 9,436,365.00 (USD 12,654,699.15)	
Latest Planning Fcst:	Yes	
FA-2022-4759623	Key reason for FC update:	Market dynamics
Total Net Sales L+5yr:	EUR 11,465,814.09	
Latest Planning Fcst:	Yes	
FA-2022-4759624	Key reason for FC update:	Market dynamics
Total Net Sales L+5yr:	EUR 7,546,123.00 (USD 9,172,686.94)	
Latest Planning Fcst:	Yes	

Channel Strengths With Pack Sizes (3+)

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 displays the SANITY interface for a channel record titled "Sandoz Hospital Tender". The interface is divided into two main sections: "Details" on the left and "Approval History (3+)" on the right.

Details Section:

- CDL Channel Name:** Sandoz Hospital Tender
- CDL:** Sugammadex sodium LVI (415039) FI
- Country:** Finland
- Country Channel:** Sandoz Hospital Tender
- Country assumptions:** Patent Launch
- Therapeutic area:** CNS
- Assumption methodology:** 12 month rolling
- Forecast Status:** Not Forecasted
- Level of competition:** Patent Launch
- Forecast Status:** Not Forecasted
- Approval Status:** Rejected
- Assumption methodology:** 12 month rolling
- Created By:** Natalia Kuehnert, 19.10.2022 12:34
- Last Modified By:** Natalia Kuehnert, 20.10.2022 21:51

Approval History (3+) Section:

- Europe Approval:** 20.10.2022 21:51
- Date:** 20.10.2022 21:51
- Status:** Rejected
- Assigned To:** Europe CDL Channel Approvers
- Actual Approver:** Natalia Kuehnert
- Comments:** This channel is out of scope
- Approval Request Submitted:** 20.10.2022 21:51
- Date:** 20.10.2022 21:51
- Status:** Submitted
- Assigned To:** Natalia Kuehnert
- Actual Approver:** Natalia Kuehnert
- Comments:**
- Europe Approval:** 20.10.2022 21:17
- Date:** 20.10.2022 21:17
- Status:** Approved
- Assigned To:** Europe CDL Channel Approvers
- Actual Approver:** Natalia Kuehnert
- Comments:**

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!