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Cost and Budget Management in SANITY

SANDOZ

Contents

- 1 Budget Management: Key benefits**
- 2 Business Process Recap**
- 3 Planning Principles**
- Hands on in the system:**
- 4 Budget Overview**
- 5 How to initiate a budget for a new project**
- 6 Budget Planning with the Conga grid**
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- 9 Next Steps**

Purpose of the solution and key benefits: Provide financial transparency of development projects



Objective:

SANITY becomes the source of truth for project budgets

Increased flexibility

- Dynamic planning in an Excel-like solution
- Monthly vs. Yearly costs
- Probabilities included
- Automatic WBS creation in SAP
- Automatic integration of actuals
- Automated & manual budget snapshots

Powerful reporting capabilities

- Insightful visualizations of project budget data
- Powerpoint replaced by Einstein dashboards
- Budget aggregations to level of platform, SDC, Project Manager easily possible
- Reduction of offline Excel files, no data transfer between Excel and MOT Templates

Get ready for
the one-stop-
shop for
project
budgets!



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Business Process Recap: How do BPA & PM interact?

Project Managers and BPAs collaborate on budget management.

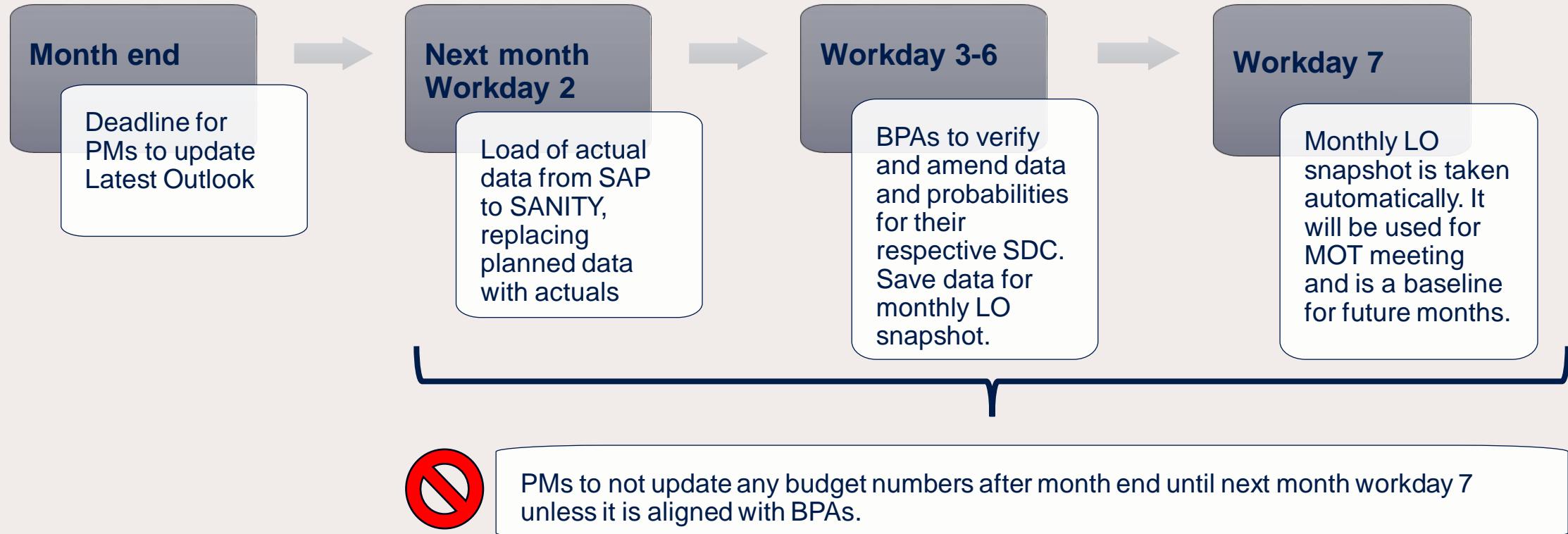


A **Project Manager** owns a set of projects.

A **BPA** has financial oversight across all projects of his/her SDC.

- Project Managers are responsible for correct cost forecasts. They provide cost data and probabilities.
- BPAs are custodians of the forecasted budget. Responsible for MOT meeting preparation, verification of submitted numbers. May adapt probabilities as needed – PMs to check quarterly probabilities.

Monthly Finance and Snapshot process: How to prepare and enable MOT



What is similar to SPIRIT and what is different

Similar to SPIRIT

- Cost types: As known from SPIRIT
- Cost structure: Global project cost and key country cost
- SAP actuals (come into SANITY via Interface)
- SAP WBS creation (will be triggered via SANITY)

Cost types:

- API
- Batch Manufacturing
- Bio & Clinical Studies
- External Analytics
- Materials and Supplies
- Other ext. Development services
- Indirect cost
- Reference listed drug

Different from SPIRIT

- Monthly data for current & next year, other years: Yearly data
- Probabilities for current & next year, other years: always 100%
- Past planned cost are overwritten with actuals from SAP
- Monthly automated & manual ad-hoc snapshots
- Reporting and Dashboard capabilities to support monthly MOT meetings

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Planning Principles: Yearly versus monthly cost

Guidance



Current year: Monthly level planning.

Subsequent years: Yearly level planning.

TGT Planning in August: Start to plan **subsequent year on monthly level**. Exact timing to be communicated by Finance.

Example



In May 2024: Plan 2024 on **monthly** level and 2025 on **yearly** level.

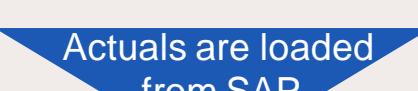
In August 2024: Plan 2024 and 2025 on **monthly** level. Year 2026 and later on **yearly** level.

Planning Principles: Actuals overwriting Planned Cost. How does it work?

SPIRIT

- Planned and Actual Cost kept separate.
 - Downside: Manual updates of planned cost with actuals required to have full budget transparency.

SANITY

- Planned costs of the past are overwritten with the actual cost – on a **monthly basis, workday 2 of each month**.
 - Total project budget will change slightly according to last months' actual cost.
 - Monthly automatic snapshots ensure budget changes can be tracked vs. last month.



Planning Principles: WBS creation in SAP

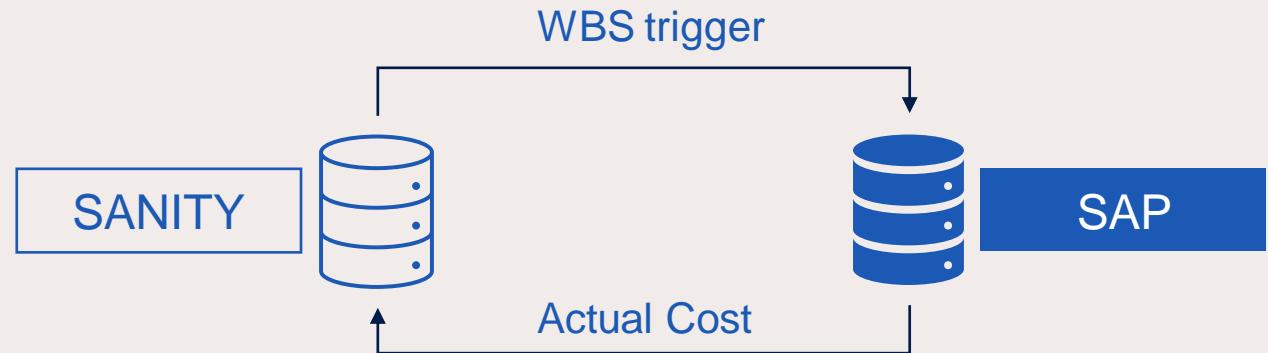
SANITY triggers WBS creation in SAP for new projects.

Relevant information to be available in SANITY:

- GMD bulk ID
- SDC
- IP Owner

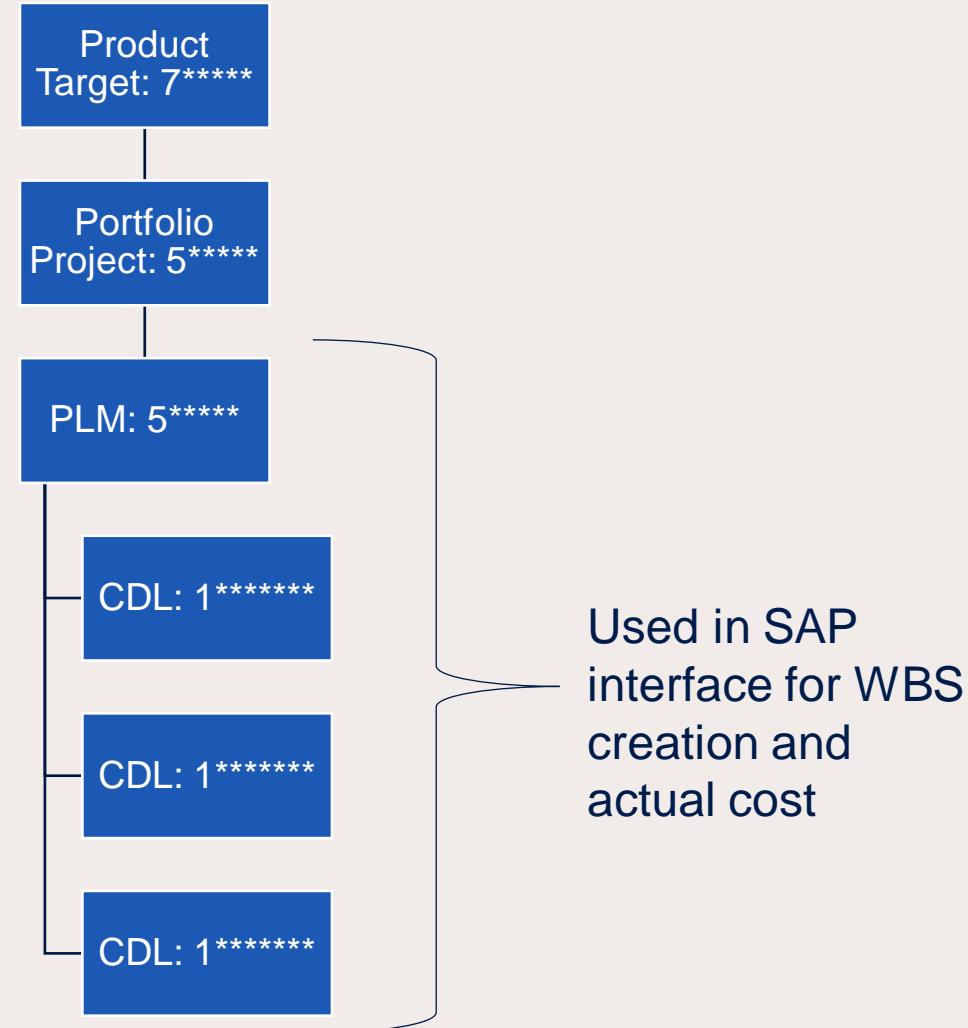
Information sent to SAP:

- Project ID
- Project Name
- Key country/ies (CDLs)
- CDL ID

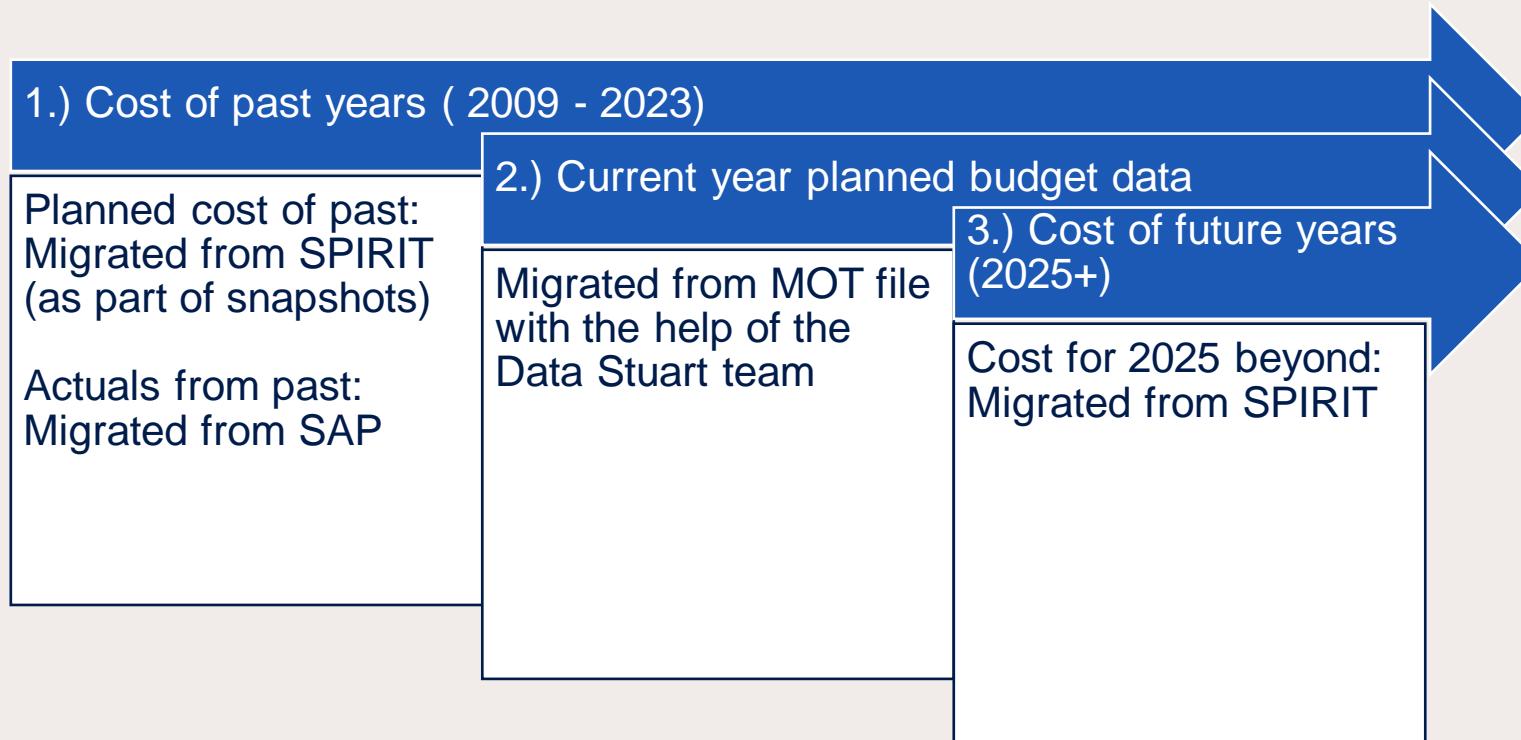


Planning Principles: SANITY will create Project IDs for projects after SPIRIT shut-down.

- Existing SPIRIT Product Target IDs, Project IDs or SPFC IDs stay unchanged and will be displayed & used in SANITY.
- After SPIRIT shut-down: SANITY creates IDs for
 - Product Targets: 6 digit ID, starting with 7*****
 - Portfolio Projects: 6 digit ID, starting with 5*****
 - PLMs: 6 digit ID, starting with 5*****. Used in WBS and actual cost interface.
 - CDLs: 8 digit ID, starting with 1*****, available for all CDLs (incl. non-key countries). Used in WBS and actual cost interface.



Data Migration: How data have been transferred from SPIRIT and BTF to SANITY



We plan to migrate Mid-Year Forecast submission data for 2024 once the file is ready in order to minimize work of PMs (end of May).

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Let's get started: The story of today's training

-  Capture the initial planned budget after project selection
-  Initiate the budget management (and adapt it later)
-  Plan cost for the current and next year - and for the long term
-  Take snapshots of what was planned before we adjust data
-  Check the big picture in reports and the dashboard

PLM Budget Overview

The Budget Overview tab gives a high level understanding of the project's financials.

Project & Launch Management
Larotrectinib sulfate HGC (419790) SDC INHY

Overall Traffic Light: ● Active Pre-Launch Countries: 30 Launched Countries: 0 Country Status Blank: 0 Interest Stage Blank: 0 Country Stages: Active, In Evaluation, Discontinued

[+ Follow](#) [Request Forecast Update](#) [Cancel Forecast Requests](#) [Edit](#) [Create MC Project](#) [Request F](#)

Budget Overview

Overview of Key Project Financials - Figures

Total Planned Budget at Selection (tUSD)	100,000,00
Last Approved Total Budget (USD)	0,00
Total Lifetime Costs (tUSD)	2,260,01
Total Actual Project Costs (tUSD)	0,00
Total Planned Project Costs (tUSD)	2,260,01
Total Remaining Project Budget (tUSD)	0,00

Overview of Key Project Financials - Dates

Last Project Budget Approval Date: ● Date of planned Budget at Selection: ●

Ringfence Information

Project Ringfence: ● Ringfencing Description: ●

Yearly Costs (10+)

10+ items • Filtered by Snapshot • Updated vor ein paar Sekunden

Yearly Cost Name	Year	Cost type	Country name	Total Yearly Costs
YC-00000000	2023	API	Global	USD 150,000,00
YC-00000001	2023	API	Germany	USD 300,000,00
YC-00000002	2023	API	United Kingdom	USD 0,00
YC-00000003	2023	API	Russia	USD 0,00
YC-00000004	2023	API	Australia	USD 0,00
YC-00000005	2023	API	Japan	USD 0,00
YC-00000006	2023	API	Taiwan	USD 0,00
YC-00000007	2023	API	Thailand	USD 0,00
YC-00000008	2023	API	Canada	USD 0,00
YC-00000009	2023	API	United States	USD 0,00

Key facts & figures

Key dates related to selection & approval

Ringfencing information

What you do right after Selection...

The screenshot shows the Project & Launch Management interface for the project 'Larotrectinib sulfate HGC (419790) SDC INHY'. The 'Budget Overview' tab is selected. A red box highlights the 'Total Planned Budget at Selection (USD)' field, which is set to 100,000.00. Below it, the 'Last Approved Total Budget (USD)' field is also highlighted. To the right, there are sections for 'Fcst Requests', 'Forecast Details', and 'Pre-Launch'.

Category	Value
Total Planned Budget at Selection (USD)	100,000.00
Last Approved Total Budget (USD)	0.00
Total Lifetime Costs (tUSD)	2,260,01
Total Actual Project Costs (tUSD)	0.00
Total Planned Project Costs (tUSD)	2,260,01
Total Remaining Project Budget (tUSD)	0.00

Please make sure that your name has been set as „Project Manager“ before you start planning. If this setting is not made upfront, you might face difficulties in data maintenance.

- After selection: PMO to enter „Total Planned Budget at selection“.
- After budget change approval by GPC: Project Managers capture „Last approved total budget“
- All PMs and PMO have edit rights on Last Approved Total Budget, other user roles can only read.

Overview of Total costs

Project & Launch Management
Larotrectinib sulfate HGC (419790) SDC INHY

Overall Traffic Light Active Pre-Launch Countries Launched Countries Country Status Blank Interest Stage Blank Country Stages Active, In Evaluation, Discontinued

+ Follow Request Forecast Update Cancel Forecast Requests Edit Create MC Project Request F

Budget Overview Team & Risks Budget & BD Supply Chain Countries & Fcsts Study & Reg News & Escalations Fcst Requests More ▾

Overview of Key Project Financials - Figures

Total Planned Budget at Selection (USD) 100,000.00

Last Approved Total Budget (USD) 0.00

Overview of Key Project Financials - Dates

Last Project Budget Approval Date Date of planned Budget at Selection

Ringfence Information

Project Ringfence Ringfencing Costs (USD)

Yearly Costs (10+)

10+ items • Filtered by Snapshot • Updated vor ein paar Sekunden

Yearly Cost Name	Year	Cost type	Country name	Total Yearly Costs
YC-00000000	2023	API	Global	USD 150,000.00
YC-00000001	2023	API	Germany	USD 300,000.00
YC-00000002	2023	API	United Kingdom	USD 0.00
YC-00000003	2023	API	Russia	USD 0.00
YC-00000004	2023	API	Australia	USD 0.00
YC-00000005	2023	API	Japan	USD 0.00
YC-00000006	2023	API	Taiwan	USD 0.00

These elements cannot be edited. They are taken over from the two elements we provided at the left hand side and from the actual cost data

Budget overview explanations

- **Total planned budget at selection:** Defined at the time of project selection. Not to **be altered** afterwards.
- **Date of planned Budget at Selection:** Date of GPC selection.
- **Last approved budget:** Project budget currently endorsed by GPC. This budget might need to be changed over the course of time.
- **Date of last approved budget:** Date of last GPC budget endorsement.

Budget overview explanations

- **Total Planned Project Cost:** Currently planned total project budget which is planned to be spent in the future.
- **Total Lifetime Costs:** Sums up the planned (future) and the actual cost (of the past).
- **Total Remaining Project Budget:** Last approved budget minus total lifetime cost. A PM can always spend a surplus of 300 kUSD without GPC endorsement. SANITY will issue a warning once the budget exceeds this 300 kUSD extension.

Ringfencing

Ringfencing allows to monitor specific less time critical or lower priority projects.
Review and clearance by BPA required before spent is allowed.

Project Manager to provide

- if ringfencing applies (yes/no)
- the total amount of cost (for the actual year) which is ringfenced
- a comment to give more background information.

▼ Ringfence Information

Project Ringfence i	Yes	Ringfencing Description i	Details to explain the background of the decision to work with ringfencing cost to be provided here
Ringfencing Costs (USD) i	100.000,00		

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Budget Data Maintenance: Where and how?

Access via PLM record: Access the cost and budget information for ONE individual project:

- Budget Overview Tab
- Budget Management Button (jumps to Conga Grid -> pre-filtered to this individual project)

The screenshot shows a Project & Launch Management interface for a project named "Rivaroxaban FCT (304088) AET". The main navigation bar includes "Details", "Project Timeline", and a red-bordered "Budget Overview" tab. Above the tabs are buttons for "Owner", "Printable View", "Sharing", "Delete", and "Clone". A dropdown menu is open over the "Clone" button, with the "Initiate Budget Management" option highlighted and also red-bordered. Other options in the menu include "Budget Management", "Create Budget Snapshot", and "Create Yearly Cost".

Access via Tab „Budget management (SM)“:

- Conga Grid contains ALL projects, for which the cost and buget information has been initiated.
- Pre-filtered to global cost
- If the project is missing under Budget Management (SM), the budget initiation step needs to be executed.

The screenshot shows a Project & Launch Management interface with a top navigation bar featuring a rocket icon, "Project & Launch M...", "Home", "Product Targets", and a red-bordered "Budget Management(SM)" tab. The "Budget Management(SM)" tab is currently active.

How to Initiate Budget Management

For a **new project**, budget planning needs to be initiated: SANITY creates the grid for the expected project duration based on the user input

For **existing projects**, data have migrated from SPIRIT to SANITY, and the overall grid has been created during the migration

How to initiate Budget Planning: Caveat: the button might be hidden

The screenshot shows a software interface with a top navigation bar containing various buttons like 'Follow', 'Request Forecast Update', 'Cancel Forecast Requests', 'Edit', 'Create MC Project', 'Request Feedback', 'Change Owner', 'Printable View', 'Sharing', 'Delete', and 'Clone'. Below the navigation bar, there are status indicators for 'Country Status Blank' (0), 'Interest Stage Blank' (0), and 'Country Stages' (Active). A red box highlights the 'Initiate Budget Management' button in the top right corner of the header. A dropdown menu is open from this button, showing options: 'Budget Management' (selected) and 'Create Yearly Cost'. The main content area has tabs for 'Budget & BD' (selected), 'Supply Chain', 'Countries & Fcsts', 'Study & Reg', and 'More'. Under 'Budget & BD', there's a 'Show Full Data' button and a note about data being available for all cost years. The 'Fcst Requests' tab shows a message: 'There are currently no active Forecast Requests.' A 'Close' button is located in the top right corner of the modal window.

Budget & BD Supply Chain Countries & Fcsts Study & Reg More ▾ Show Full Data

Data* button to open the full summary of all cost years.
ending (kUSD) Cancelled (kUSD) Completed (kUSD)

Fcst Requests Str & Packs

There are currently no active Forecast Requests.

Budget Management

Please select an option from below and click next!

Initiate budget creation Expand budget for a specific year Remove budget for a specific year

Next

**Select start and end date and click finish
You can make adjustments (expand or remove)
later on.**

The screenshot shows a "Budget Management" interface with the following elements:

- Budget Management** header with a blue square icon.
- Select Start Year** field containing **2024**.
- Select End Year** field containing **2029**.
- Please select start year and end year, and click on Finish!** instruction.
- Back** and **Finish** buttons at the bottom right.

A large black callout box with white text is positioned to the right of the interface, containing two messages:

- Start year should usually be the current year**
- Check your e-Mail!
It takes a little while
(1-2 minutes) to create
the records in SANITY –
you will be notified when
the system is ready**

A red "Close" button is located in the top right corner of the callout box.

Once you receive this email notification, your WBS with yearly cost records for a PLM has been created

The screenshot shows an email from "noreply@salesforce.com" regarding the completion of Yearly Cost Creation for PLM. The email details:

- Total Number of records to be created: 54
- Number of records created: 54
- Number of records failed: 0

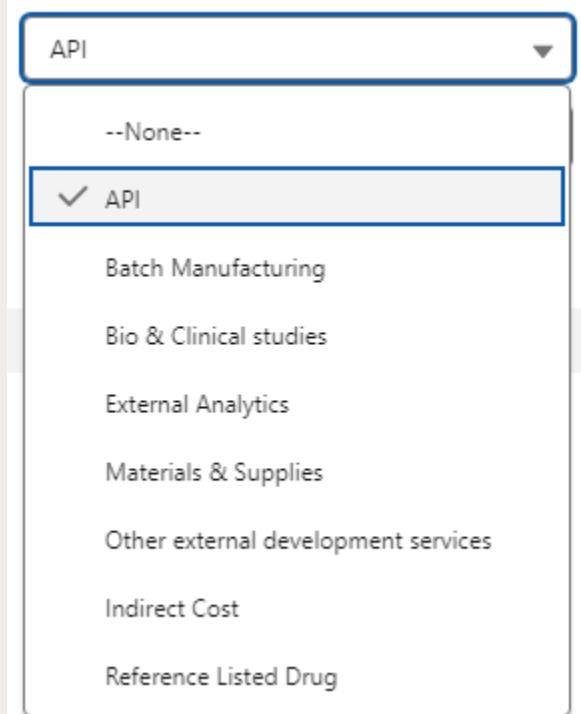
A link in the email body is highlighted with a red box and a callout pointing to the text: "The hyperlink takes you back to the respective PLM record in SANITY". Another callout points to a button in the SANITY interface labeled "Budget Management" which is also highlighted with a red box.

The SANITY application interface shows the following details:

- Header: SANITY: Yearly Cost Creation for PLM - [REDACTED] SDC INHY
- Toolbar: File, Message, Help, Tell me what you want to do, Share to Teams, All Apps, Mark Unread, Find, Zoom.
- Message Content:
 - From: noreply@salesforce.com on behalf of [REDACTED]
 - To: Raveeshya, Paras (Div)
 - Retention Policy: Inbox (90 days)
 - Expires: 4/30/2024
 - Dear [REDACTED]
 - The processing of Yearly Cost creation is complete. Please refer to the details below
 - Total Number of records to be created: 54
 - Number of records created: 54
 - Number of records failed: 0
 - To go back to the PLM record please click [Me](#)
 - If there are any errors please contact your SuperUser and provide them the attached error log file.
 - Best regards,
SANITY Team
 - If you need support, find your SuperUser on the [SANITY Team Overview](#) or reach out to [SANITY](#)
- Buttons: + Follow, Request Forecast Update, Cancel Forecast Requests, Edit, Create MC Project, Request Feedback, Change Owner, Printable View, Sharing, Delete, Clone.
- Data Summary:
 - Country Status Blank: 0
 - Interest Stage Blank: 0
 - Country Stages Active: Active
- Navigation: Budget & BD, Supply Chain, Countries & Fcsts, Study & Reg, More, Show Full Data.
- Forecast Requests: Fcst Requests, Str & Packs. Note: There are currently no active Forecast Requests.
- Action Bar: Initiate Budget Management, Budget Management (highlighted with a red box), Create Yearly Cost.

Cost types – Overview

Global cost and country cost (key countries)



It is technically possible to book e.g. API cost on a country but for countries, typically only Bioequivalence & Clinical studies apply.

It is possible to create additional cost items, if required

We have the checkbox „**Local cost**“ in place to indicate if a cost element is covered by a country (e.g. a country sponsored study cost as known from e.g. Canada) - nevertheless the majority of studies is covered by the global budget!

Technically it is possible to mark a global cost line item as „local cost“ but semantically it is necessary to understand who covers these cost.

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Budget Planning with the Conga Grid

The screenshot shows a grid-based budget planning application with various UI elements:

- Header:** Includes a search bar, navigation links (Regulatory, Home, etc.), and a toolbar with icons for Add, Save, and Actions.
- Grid:** A main data table titled "Yearly Costs" with columns for Action, Record Type, Project & Launch Management, Cost Type, Year, Country, and Project Manager. Data rows show entries for Iron + Zibotentan + Rosuvastatin zinc BCF|BCSandoz Dev across years 2024, 2025, and 2026.
- Contextual Menu:** A dropdown menu is open on the right side of the grid, listing options like Fields, Font Size, Conditional Formatting, Formulas, Filter Logic, Reorder Columns, Reset Column Widths, Clear Filters, and Clear Formatting.
- Callouts:** Three callout boxes provide instructions:
 - Refresh the view:** Points to the refresh icon in the top right corner of the grid.
 - With the gear wheel reset the column width:** Points to the "Reset Column Widths" option in the context menu.
 - Hide and unhide the upper navigation element:** Points to the gear icon in the top right corner of the grid.
- Page Navigation:** At the bottom left, there are navigation icons for back, forward, and search, along with a page number indicator (1/50).
- Page Footer:** At the bottom right, it says "1-36 out of 36 BETA".

Columns of the Conga Grid Explained

Action	Record Type	Project & Launch M...	Cost Type	Country	Year	Project Manager	Partner / SDC	Total Yearly Costs (Unprobabilized)	Total Costs Probabilized
View Edit	Yearly Cost (SM)	Amoxicillin trihydrat...	Indirect Cost	Global	2016			USD 40.000,00	USD 40.000,00
View Edit	Yearly Cost (SM)	Tafluprost LDP(303...	Other external developme...	Global	2015			USD 919.070,00	USD 919.070,00
View Edit	Yearly Cost (SM)	Clopidogrel hydroge...	API	Global	2010			USD 36.200,00	USD 36.200,00
View Edit	Yearly Cost (SM)	Dosageform hydrochloride	Bio P Clinical studies	Global	2010			USD 3.000,00	USD 3.000,00

Global + Key countries

Record type must be set to „Yearly Cost (SM)“ (to distinguish from Biosimilars)

PLM name (incl. 6-digit number)

This column is the sum of the monthly cost or taken over from yearly cost override and cannot be edited

This column is calculated based on the monthly or quarterly probabilities applied and cannot be edited

Columns of the Conga Grid Explained

The left part stays in place

Probabilities are applied by quarter

This column can be edited. SANITY will then equally distribute the amount over the months of the year

Action	Project & Launch M...	Cost Type	Country	Year	Total Yearly Costs (...)	Total Costs Probabil...	Q1 Probability	Q2 Pro...	Q3 Prob...	Q4 Pro...	Yearly Costs (Override)
View Edit	Amoxicillin trihydr...	Indirect Cost	Global	2016	USD 40.000,00	USD 40.000,00	100%	100%	100%	100%	USD 40.000,00
View Edit	Tafluprost LDP(30...	Other external developme...	Global	2015	USD 919.070,00	USD 919.070,00	100%	100%	100%	100%	USD 919.070,00
View Edit	Clopidogrel hydro...	API	Global	2010	USD 36.200,00	USD 36.200,00	100%	100%	100%	100%	USD 36.200,00
View Edit	Donepezil hydroch...	Bio & Clinical studies	Global	2010	USD 3.090,00	USD 3.090,00	100%	100%	100%	100%	USD 3.090,00

Columns of the Conga Grid Explained

The screenshot shows a grid interface with a header bar containing a search bar, navigation links (Budget Management(SM), Country Detail Levels, Meeting Agenda Items, Reports, Dashboards), and user icons. The main area is titled "Yearly Costs" and displays a grid of cost items. The grid has columns for Action, Project & Launch, Cost Type, Country, Year, November, December, Comment, and Local Costs. A tooltip "The left part stays in place" points to the first four columns. A tooltip "Columns for each month" points to the November and December columns. A tooltip "Please provide comments for cost items that need a bit of background / explanation" points to the Comment column. A tooltip "Please indicate here if the cost is borne in the country budget (instead of global budget)" points to the Local Costs column.

Action	Project & Launch ...	Cost Type	Country	Year	November	December	Comment	Local Costs
View Edit	Amoxicillin trihydr...	Indirect Cost	Global	2016	USD 3.333,33	USD 3.333,33		
View Edit	Tafluprost LDP(30...	Other external developme...	Global	2015	USD 76.589,17	USD 76.589,17		
View Edit	Clopidogrel hydro...	API	Global	2010	USD 3.016,67	USD 3.016,67		
View Edit	Donepezil hydroch...	Bio & Clinical studies	Global	2010	USD 257,50	USD 257,50		

Countries – general remarks

You can only edit project costs for key countries which are part of your PLM

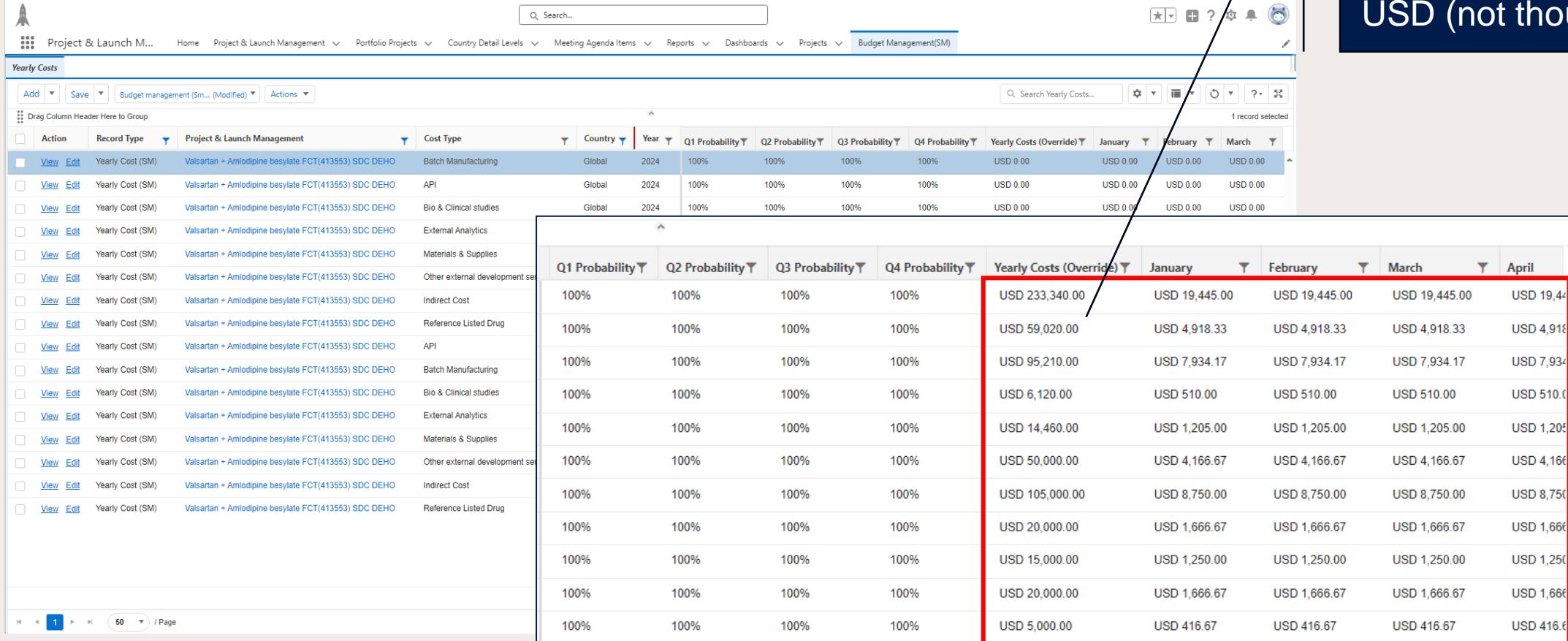
Action	Record Type	Project & Launch Management	Cost Type	Country	Year	Project Manager					
View	Edit	Yearly Cost...	PEGylated iron oxide IMSYSan...	8810 Drug Substance ...	JP	2028					
View	Edit	Yearly Cost...	Iron Oligosomaltose + IRON D...	8810 Drug Substance ...	BR	2027	Sandoz Dev	USD 0,00	10...	10...	10...
View	Edit	Yearly Cost...	Iron Oligosomaltose + IRON D...	8813 Comparator Costs	EU	2027	Sandoz Dev	USD 0,00	10...	10...	10...
View	Edit	Yearly Cost...	Larotrectinib sulfate HGC(41979...	API	AU	2023	Mohit Sawant	SDC INHY	USD 150.000,00	80%	10...
View	Edit	Yearly Cost...	Selpercatinib HGC(421302) SD...	API	EU	2029	Pavithra Anand	SDC INHY	USD 0,00		
View	Edit	Yearly Cost...	PEGylated iron oxide IMSYSan...	API	Global	2029		USD 0,00		10...	10...
View	Edit	Yearly Cost...	Ganciclovir sodium LSPSDC IN...	API	US	2024		SDC INHY	USD 0,00	10...	10...
View	Edit	Yearly Cost...	Iron hydroxide sucrose LYAMSD...	API	EU	2024		SDC INHY	USD 0,00	10...	10...
View	Edit	Yearly Cost...	Sennoside A&B calcium GOSO...	API	US	2002	Sandoz Dev	USD 0,00		10...	10...
View	Edit	Yearly Cost...	Sennoside A&B calcium GOSO...	API	CA	2001	Sandoz Dev	USD 0,00		10...	10...
View	Edit	Yearly Cost...	Iron Oligosomaltose + IRON D...	API	EU	2024	Sandoz Dev	USD 0,00		10...	10...
View	Edit	Yearly Cost...	Iron Oligosomaltose + IRON D...	Batch Manufacturing	AU	2025	Sandoz Dev	USD 0,00		10...	10...
View	Edit	Yearly Cost...	Iron Oligosomaltose + IRON D...	Batch Manufacturing	AU	2026	Sandoz Dev	USD 0,00		10...	10...
View	Edit	Yearly Cost...	Iron Oligosomaltose + IRON D...	Batch Manufacturing	Global	2029		USD 0,00		10...	10...
View	Edit	Yearly Cost...	PEGylated iron oxide IMSYSan...	Batch Manufacturing	Global	2028		USD 0,00		10...	10...
View	Edit	Yearly Cost...	PEGylated iron oxide IMSYSan...	Batch Manufacturing	Global	2040		USD 0,00		10...	10...
View	Edit	Yearly Cost...	PEGylated iron oxide IMSYSan...	Batch Manufacturing	Global	2029		USD 0,00		10...	10...

You can only edit project costs for key countries which are part of your PLM

The list displays ALL key countries!

Caveat:
If you try to maintain a
line for a key country
which is NOT part of your
project, SANITY will
check this when you save
your edits and will show
an error message!

Scroll to the right side: Input for current year is provided monthly. For further years only yearly...



Action	Record Type	Project & Launch Management	Cost Type	Country	Year	Q1 Probability	Q2 Probability	Q3 Probability	Q4 Probability	Yearly Costs (Override)	January	February	March	April
View	Edit	Yearly Cost (SM)	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Batch Manufacturing	Global	2024	100%	100%	100%	100%	USD 0.00	USD 0.00	USD 0.00	USD 0.00
View	Edit	Yearly Cost (SM)	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	API	Global	2024	100%	100%	100%	100%	USD 0.00	USD 0.00	USD 0.00	USD 0.00
View	Edit	Yearly Cost (SM)	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Bio & Clinical studies	Global	2024	100%	100%	100%	100%	USD 0.00	USD 0.00	USD 0.00	USD 0.00
View	Edit	Yearly Cost (SM)	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	External Analytics										
View	Edit	Yearly Cost (SM)	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Materials & Supplies										
View	Edit	Yearly Cost (SM)	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Other external development se										
View	Edit	Yearly Cost (SM)	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Indirect Cost										
View	Edit	Yearly Cost (SM)	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Reference Listed Drug										
View	Edit	Yearly Cost (SM)	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	API										
View	Edit	Yearly Cost (SM)	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Batch Manufacturing										
View	Edit	Yearly Cost (SM)	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Bio & Clinical studies										
View	Edit	Yearly Cost (SM)	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	External Analytics										
View	Edit	Yearly Cost (SM)	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Materials & Supplies										
View	Edit	Yearly Cost (SM)	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Other external development se										
View	Edit	Yearly Cost (SM)	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Indirect Cost										
View	Edit	Yearly Cost (SM)	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Reference Listed Drug										

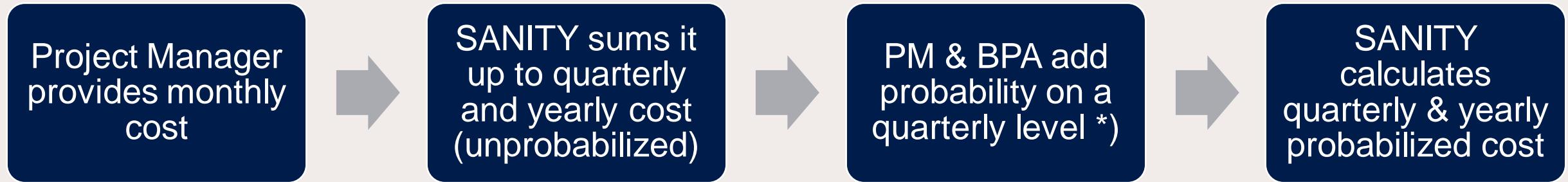
To avoid discrepancies,
cost has to be booked in
USD (not thousand USD)

Total amount per month to see „Total Yearly Cost (Unprobabilized)“ is adjusted with the probability of a delayed expenditure of this cost.

Total Yearly Costs (Unprobabilized)	Q1 Probability	Q2 Probability	Q3 Probability	Q4 Probability	Yearly Costs (Override)	Janua
USD 253,560.00	100%	100%	80%	100%	USD 253,560.00	USD ▲

Once you save it, the probabilized cost will be calculated and applied to the „yearly cost probabilized“ column.
The red triangle indicates unsaved data.

How do probabilities get applied (example: current year or year ahead)



***) Please note: Probabilities are mandatory
you cannot save your planned budget
line item without assigning the quarterly probabilities,
this is why the default value has been set to 100%**

Tipps & Tricks

How to apply filters

The screenshot illustrates two methods for applying filters in a software application:

Method 1: Filter Dialog (Top Left)

A red box highlights the filter dialog for the "Country" column. It shows a dropdown menu with the value "Global" selected. Below the dropdown are buttons for "Filter" and "Clear".

Action	Project & Launch Management	Cost type	Country	Year	Project Manager
View	Meloxicam + Rizatriptan TAB ...	Bio & Clinical studies	CDL...	United States	Chowdavara...
View	Meloxicam + Rizatriptan TAB ...	API		Global	Chowdavara...
View	Meloxicam + Rizatriptan TAB ...	Batch Manufacturing		Global	Chowdavara...
View	Meloxicam + Rizatriptan TAB ...	Bio & Clinical studies		Global	Chowdavara...
View	Meloxicam + Rizatriptan TAB ...	External Analytics		Global	Chowdavara...
View	Meloxicam + Rizatriptan TAB ...	Materials & Supplies	Global	2024	Chowdavara...
View	Meloxicam + Rizatriptan TAB ...	Other external develop...	Global	2024	Chowdavara...
View	Meloxicam + Rizatriptan TAB ...	Personnel cost	Global	2024	Chowdavara...

Method 2: Smart Filter (Bottom Right)

A red box highlights the "Smart Filter" dialog. It shows a dropdown menu with the value "2024" selected. Below the dropdown are checkboxes for "(Select All Search Results)" and "Add current selection to filter". A button "Filter" is at the bottom right.

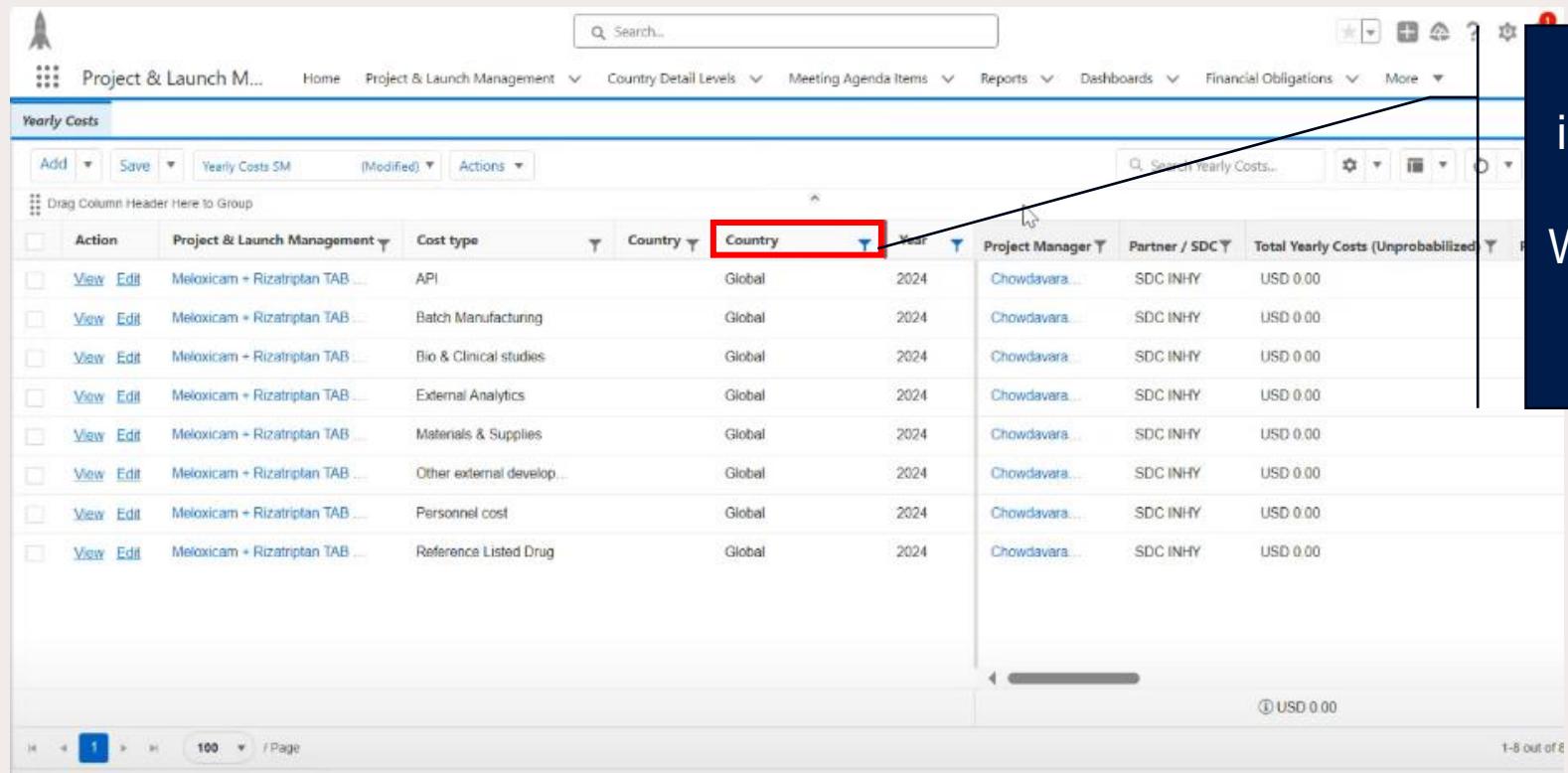
Action	Project & Launch Management	Cost type	Country	Country	Year	Project Manager	Partner / SDC	Total Yearly Costs (Unprobabilized)	Probability
View	Meloxicam + Rizatriptan TAB ...	Batch Manufacturing		Global	20	Smart Filter	Basic Filter	USD 0.00	
View	Meloxicam + Rizatriptan TAB ...	Bio & Clinical studies		Global	20			USD 0.00	
View	Meloxicam + Rizatriptan TAB ...	External Analytics		Global	20			USD 0.00	
View	Meloxicam + Rizatriptan TAB ...	Materials & Supplies		Global	20			USD 0.00	
View	Meloxicam + Rizatriptan TAB ...	Other external develop...		Global	20			USD 0.00	
View	Meloxicam + Rizatriptan TAB ...	Personnel cost		Global	20			USD 0.00	
View	Meloxicam + Rizatriptan TAB ...	Reference Listed Drug		Global	20			USD 0.00	
View	Meloxicam + Rizatriptan TAB ...	API		Global	20			USD 0.00	
View	Meloxicam + Rizatriptan TAB ...	Batch Manufacturing		Global	20			USD 0.00	
View	Meloxicam + Rizatriptan TAB ...	Bio & Clinical studies		Global	20			USD 0.00	

Tipps & Tricks: Filtering by project number on Project & Launch Management Column (Instead of the search field)

The screenshot shows a list of 'Yearly Costs' in a Project & Launch Management application. A filter dialog is open over the 'Cost Type' column. The dialog has a search input field containing '4197'. It includes checkboxes for '(Select All Search Results)' and 'Add current selection to filter', and a checked checkbox for 'Larotrectinib sulfate HGC(419790...)'. A 'Filter' button at the bottom is highlighted with a red box. The main table lists various yearly costs, mostly for monkeypox & smallpox vaccine ODFSandoz Dev, across different years (2014-2025) and countries (Global).

Action	Record Type	Project & Launch Management	Cost Type	Country (Link)	Country (Text)	Year
View	Edit	Yearly Cost (S... monkeypox & smallpox vaccine ODFSandoz Dev		Global	2024	
View	Edit	Yearly Cost (S... monkeypox & smallpox vaccine ODFSandoz Dev		Global	2024	
View	Edit	Yearly Cost (S... monkeypox & smallpox vaccine ODFSandoz Dev		Global	2024	
View	Edit	Yearly Cost (S... monkeypox & smallpox vaccine ODFSandoz Dev		Global	2024	
View	Edit	Yearly Cost (S... monkeypox & smallpox vaccine ODFSandoz Dev		Global	2024	
View	Edit	Yearly Cost (S... monkeypox & smallpox vaccine ODFSandoz Dev		Global	2024	
View	Edit	Yearly Cost (S... monkeypox & smallpox vaccine ODFSandoz Dev		Global	2024	
View	Edit	Yearly Cost (S... monkeypox & smallpox vaccine ODFSandoz Dev		Global	2024	
View	Edit	Yearly Cost (S... monkeypox & smallpox vaccine ODFSandoz Dev		Global	2024	
View	Edit	Yearly Cost (S... Estradiol + Norethisterone acetate TTSM(100133) SDC DEHO		Global	2016	
View	Edit	Yearly Cost (S... Hydroxychloroquine sulfate TAB(422630) SDC INHY		Global	2025	
View	Edit	Yearly Cost (S... Paroxetine hydrochloride FCT(100240) SDC DEHO		Global	2019	
View	Edit	Yearly Cost (S... Estradiol + Norethisterone acetate TTSM(100133) SDC DEHO		Global	2014	
View	Edit	Yearly Cost (S... Risperidone FCT(100356) SDC DEHO		Global	2018	
View	Edit	Yearly Cost (S... Olanzapine FCT(100485) SDC INHY		Global	2018	

Some filters have been applied as default setting so as to make data easier to recognize and digest



Action	Project & Launch Management	Cost type	Country	Year	Project Manager	Partner / SDC	Total Yearly Costs (Unprobabilized)
View	Meloxicam + Rizatriptan TAB...	API	Global	2024	Chowdavara...	SDC INHY	USD 0.00
View	Meloxicam + Rizatriptan TAB...	Batch Manufacturing	Global	2024	Chowdavara...	SDC INHY	USD 0.00
View	Meloxicam + Rizatriptan TAB...	Bio & Clinical studies	Global	2024	Chowdavara...	SDC INHY	USD 0.00
View	Meloxicam + Rizatriptan TAB...	External Analytics	Global	2024	Chowdavara...	SDC INHY	USD 0.00
View	Meloxicam + Rizatriptan TAB...	Materials & Supplies	Global	2024	Chowdavara...	SDC INHY	USD 0.00
View	Meloxicam + Rizatriptan TAB...	Other external develop...	Global	2024	Chowdavara...	SDC INHY	USD 0.00
View	Meloxicam + Rizatriptan TAB...	Personnel cost	Global	2024	Chowdavara...	SDC INHY	USD 0.00
View	Meloxicam + Rizatriptan TAB...	Reference Listed Drug	Global	2024	Chowdavara...	SDC INHY	USD 0.00

Blue filter symbol indicates that a filter has been applied.
Whenever the table does not display what you expect: check filters!

Conga grid view in SANITY is pre-filtered by Global: Check if country specific cost has been set (blue filter)

The screenshot shows a grid view of project costs. A blue box highlights the 'Global' entry in the 'Country' column for the first row. A callout bubble says: 'Applied filtering to reduce number of visible lines'. Another callout bubble says: 'All common project cost is put under „Global“'. A third callout bubble says: 'Individual country records for country specific cost items (available for key countries)'.

Action	Project & Launch Management	Cost Type	Country	Year	Project Manager	Partner / SDC	Total Y
View	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Batch Manufacturing	Global	2024		SDC DEHO	USD 2
View	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Bio & Clinical studies	EU	2024		SDC DEHO	USD 0
View	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Bio & Clinical studies	BR	2024		SDC DEHO	USD 0
View	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Bio & Clinical studies	MX	2024		SDC DEHO	USD 0
View	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Bio & Clinical studies	TH	2024		SDC DEHO	USD 0
View	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Bio & Clinical studies	TW	2024		SDC DEHO	USD 0
View	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Bio & Clinical studies	GB	2024		SDC DEHO	USD 0
View	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Bio & Clinical studies	AU	2024		SDC DEHO	USD 0
View	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	API	Global	2024			USD 0
View	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Bio & Clinical studies	Global	2024			USD 0
View	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	External Analytics	Global	2024			USD 0
View	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Materials & Supplies	Global	2024			USD 0
View	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Other external development services	Global	2024			USD 0
View	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Indirect Cost	Global	2024			USD 0
View	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Reference Listed Drug	Global	2024			USD 0
View	Valsartan + Amlodipine besylate FCT(413553) SDC DEHO	Bio & Clinical studies	EU	2025		SDC DEHO	USD 0

Further customize with settings (gear wheel icon)

The screenshot shows a software application window titled "Yearly Costs". At the top, there is a toolbar with various icons and a search bar. A red arrow points from the text "Further customize with settings (gear wheel icon)" to a blue square highlighting the gear icon in the toolbar. A larger red box highlights a dropdown menu that has been opened from the gear icon. This menu lists several columns with checkboxes and a "Type" column. Some items like "Cost cad..." and "Cost type" have checkboxes checked. Other items like "Country n...", "Created...", and "December" also have checkboxes checked. The menu is titled "Search Field" and "Type".

You can customize the columns by searching and selecting them from this list

How to add line items in the tab „Budget Management (SM)“

Add a new line item for your planned budget here

Select „Yearly Cost SM“ here

Action	Record Type	Project & Launch Management	Cost Type	Country	Year	Project Manager	Partner / SDC	Total Yearly Costs (Unprobabilized)
View	Yearly Cost (SM)	Binimetinib FCT(419266) SDC INHY	API	Global	2023			USD 0,00
View	Yearly Cost (SM)	Binimetinib FCT(419266) SDC INHY	API	US	2023	Mohit Sawant	SDC INHY	USD 0,00

Select „Yearly Cost SM“ here

Action	Record Type	Project & Launch Management	Cost Type	Country	Year	Project Manager	Partner / SDC	Total Yearly Costs (Unprobabilized)
Delete	0120000000			Global				USD 0,00
View	Yearly Cost (SM)	Binimetinib FCT(419266) SDC INHY	API	Global	2023			USD 0,00
View	Yearly Cost (SM)	Binimetinib FCT(419266) SDC INHY	API	US	2023	Mohit Sawant	SDC INHY	USD 0,00

How to add line items in the tab „Budget Management (SM)

If you have started from the tab „Budget Management SM“ you need to manually select the PLM (search by API or by 6 digit project number)
It is prefilled if you started from the PL;

Action	Record Type	Project & Launch Management	Cost Type	Country	Year
<input checked="" type="checkbox"/>	Delete	Yearly Cost (SM)	<input type="text"/>	Global	
<input type="checkbox"/>	View Edit	Yearly Cost (SM)	2,4-Dichlorobenzyl Alcohol + Amylmetacresol LOZ (305423) Geiser Pharma	Global	2023
<input type="checkbox"/>	View Edit	Yearly Cost (SM)	5-Fluorouracil LIVI(302400) SDC ATUN	US	2023
<input type="checkbox"/>	View Edit	Yearly Cost (SM)	5-Fluorouracil LIVI(303482) SDC ATUN	AU	2023
<input type="checkbox"/>	View Edit	Yearly Cost (SM)	5-Fluorouracil LIVI(303483) SDC ATUN	MX	2023
<input type="checkbox"/>	View Edit	Yearly Cost (SM)	a1N8E000004v1GS	JP	2023
<input type="checkbox"/>	View Edit	Yearly Cost (SM)	Abacavir + Dolutegravir + Lamivudine FCT(416078) SDC SILJ	CA	2023
<input type="checkbox"/>	View Edit	Yearly Cost (SM)	Abacavir + Dolutegravir + Lamivudine FCT(416078) SDC SILJ		

Select the Cost Type from the dropdown value and proceed with adjustments of the Country and Year

Project & Launch Management	Cost Type	Country	Year
Binimatinib FCT(419266) SDC INHY	--None--	Global	
Binimatinib FCT(419266) SDC INHY	--None--	Global	2023
Binimatinib FCT(419266) SDC INHY	API	Global	2023
Binimatinib FCT(419266) SDC INHY	Batch Manufacturing	Global	2023
Binimatinib FCT(419266) SDC INHY	Bio & Clinical studies	Global	2023
Binimatinib FCT(419266) SDC INHY	External Analytics	Global	2023
Binimatinib FCT(419266) SDC INHY	Materials & Supplies	Global	2023

How to add line items in the tab „Budget Management (SM)“

You could save your new budget management line item now...

...or continue with budget maintenance

You tried to create a duplicate line item the same combination of API, Year, cost type and country already exists

Action	Record Type	Project & Launch Management	Cost Type	Country	Year	Yearly Costs (Override)	January	February	March	April	May	June	July	August	September	October	November	December	
<input checked="" type="checkbox"/>	View Edit	Yearly Cost (SM)	Binimetinib FCT(419266) SDC INHY	External Analytics	CA	2023	USD 100.000,00	USD 10.000,00											
<input type="checkbox"/>	View Edit	Yearly Cost (SM)	Binimetinib FCT(419266) SDC INHY	API	Global	2023	USD 0,00	USD 0,00	USD 0,00	USD 0,00	USD 0,00	USD 0,00	USD 0,00	USD 0,00	USD 0,00	USD 0,00	USD 0,00	USD 0,00	
<input type="checkbox"/>	View Edit	Yearly Cost (SM)	Binimetinib FCT(419266) SDC INHY	API	US	2023	USD 0,00	USD 0,00											
<input type="checkbox"/>	View Edit	Yearly Cost (SM)	Binimetinib FCT(419266) SDC INHY	API	AU	2023	USD 0,00	USD 0,00											

Errors

Errors are present:
NO ID - duplicate value found: Unique_Check_c duplicates value on record with id: a3m7Q000000DYspQAG

Edit Yearly or Monthly cost columns and apply probabilities

Add	Save	Budget management (Sm... (Modified)	Actions	Search Yearly Costs...	Settings	Print	Refresh	Help	Exit			
Drag Column Header Here to Group												
	A...	Project & Launch M...	Cost Type	Country	Year...	Total Yearly Costs (U...)	Total Costs Prob...	Q1 Probabi...	Q2 Probabi...	Q3 Probabi...	Q4 Probabi...	Yearly Costs (Override)
<input type="checkbox"/>	V...	Binimetinib FCT(41...	Bio & Clinical studies	Global	2030	USD 101.666,67	USD 96.666,67	100%	80%	100%	100%	USD 101.666,67
<input type="checkbox"/>	V...	Binimetinib FCT(41...	Reference Listed Drug	Global	2030	USD 100.000,00	USD 100.000,00	100%	0%	100%	100%	USD 100.000,00

The „Total Yearly Costs“ is carried over from the Yearly Costs field.

If you maintain yearly cost AND monthly cost, the yearly cost override the monthly ones.
If you adjust only a monthly cost later, this will stay and change the yearly sum

The probability you set affects the „Total Cost Probabilized“ column

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Snapshotting: How to create a Manual Snapshot: Start from the PLM on the Budget Overview tab

The screenshot shows the Project & Launch Management (PLM) interface. At the top, there is a navigation bar with various links like Home, Project & Launch Management, Portfolio Projects, Country Detail Levels, Meeting Agenda Items, Reports, Dashboards, Projects, and Budget Management. A search bar is also present. On the right side of the header, there are several icons.

The main content area displays a project titled "Iron + Zibotentan + Rosuvastatin zinc BCF|BCT|GLVI|IMSY (502478) Sandoz Dev". Below the title, there are some statistics: Overall Traffic Light (grey), Active Pre-Launch Countries (2), Launched Countries (0), Country Status Blank (0), Interest Stage Blank (0), and Country Stages (Active).

A message at the top states: "Please note that the budget threshold is currently exceeded! Please review the costs forecast or update "Last Approved Total Budget (USD)" post required endorsement."

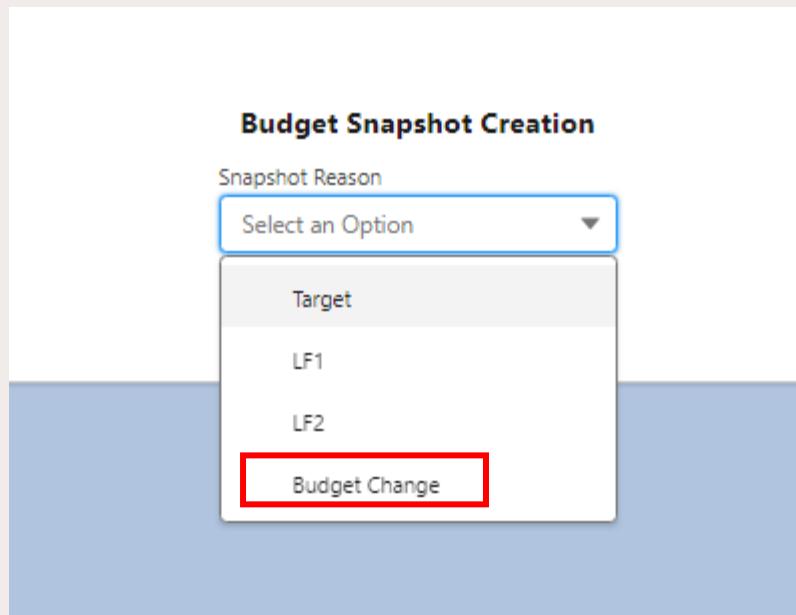
The interface features a tab navigation bar with "Budget Overview" highlighted by a red box. Other tabs include Details, Project Timeline, Team & Risks, Budget & BD, Supply Chain, Countries & Fcsts, Study & Reg, News & Escalations, and More.

In the center, there is a large callout box with the text: "Start on the budget overview tab of the PLM".

On the right side of the interface, there is a "Create Budget Snapshot" button, which is also highlighted by a red box. A callout box next to it says: "Use this button to create an new budget snapshot manually".

Below the main content, there are sections for "Fcst Requests" (which shows no active requests), "Forecast Details" (with details about forecast first launch year and sales pipeline), "Pre-Launch" (with a note about enterprise pipeline definition), and "Current Project Sales Forecasts (L+5y)".

Snapshotting: How to create a Manual Snapshot



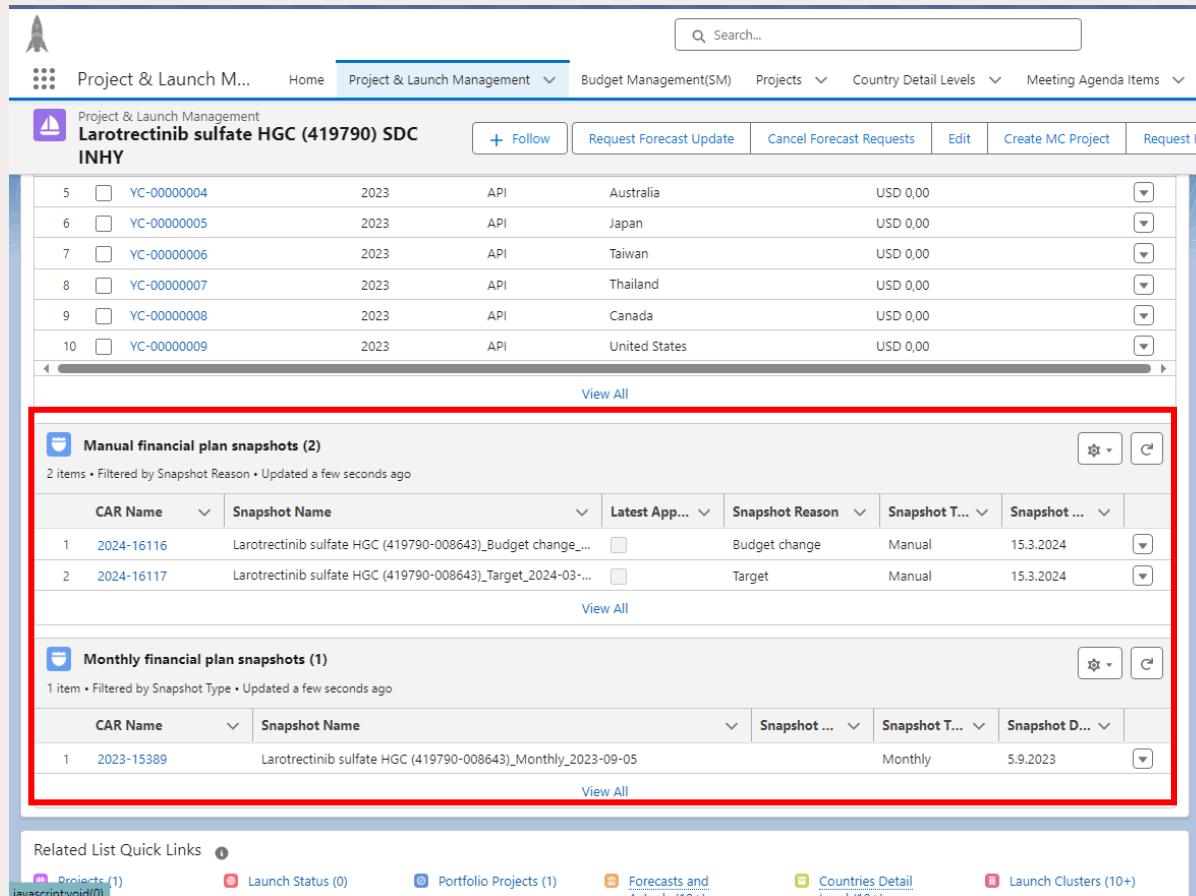
The budget at the time of approval will be recorded as a snapshot. So you have the „baseline“ always available.

SANITY will take a snapshot on the 7th workday of each month, automatically. This snapshot will appear in the monthly section.

Snapshots with Label „Target“, LF1 and LF2 will be made by the data stuart team – across all projects at the same time.

In addition, you can take snapshots at any time (ideally BEFORE you make changes) and classify them with the label „budget change“. You will find them in the Manual financial Plan Snapshots section

Where can I find my snapshots? Please use Einstein Dashboards for data access.



The screenshot shows the Project & Launch Management interface with the 'Budget Overview' tab selected. At the top, there's a search bar and a navigation bar with links like 'Home', 'Project & Launch Management', 'Budget Management(SM)', 'Projects', 'Country Detail Levels', and 'Meeting Agenda Items'. Below the navigation is a section titled 'Project & Launch Management' with a sub-section for 'Larotrectinib sulfate HGC (419790) SDC INHY'. This section includes buttons for '+ Follow', 'Request Forecast Update', 'Cancel Forecast Requests', 'Edit', 'Create MC Project', and 'Request Fe...'. The main content area displays a table of financial data:

5	YC-00000004	2023	API	Australia	USD 0,00
6	YC-00000005	2023	API	Japan	USD 0,00
7	YC-00000006	2023	API	Taiwan	USD 0,00
8	YC-00000007	2023	API	Thailand	USD 0,00
9	YC-00000008	2023	API	Canada	USD 0,00
10	YC-00000009	2023	API	United States	USD 0,00

Below this table is a 'View All' button. Further down, there are two sections highlighted with red boxes:

- Manual financial plan snapshots (2)**:
2 items • Filtered by Snapshot Reason • Updated a few seconds ago

CAR Name	Snapshot Name	Latest App...	Snapshot Reason	Snapshot T...	Snapshot D...
1 2024-16116	Larotrectinib sulfate HGC (419790-008643)_Budget change...	<input type="checkbox"/>	Budget change	Manual	15.3.2024
2 2024-16117	Larotrectinib sulfate HGC (419790-008643)_Target_2024-03-...	<input type="checkbox"/>	Target	Manual	15.3.2024

[View All](#)
- Monthly financial plan snapshots (1)**:
1 item • Filtered by Snapshot Type • Updated a few seconds ago

CAR Name	Snapshot Name	Snapshot ...	Snapshot T...	Snapshot D...
1 2023-15389	Larotrectinib sulfate HGC (419790-008643)_Monthly_2023-09-05	Monthly	5.9.2023	

[View All](#)

At the bottom, there's a 'Related List Quick Links' section with links to 'Projects (1)', 'Launch Status (0)', 'Portfolio Projects (1)', 'Forecasts and Actuals (10+)', 'Countries Detail Level (10+)', and 'Launch Clusters (10+)'. A note at the bottom left says 'javascript:void(0)'.

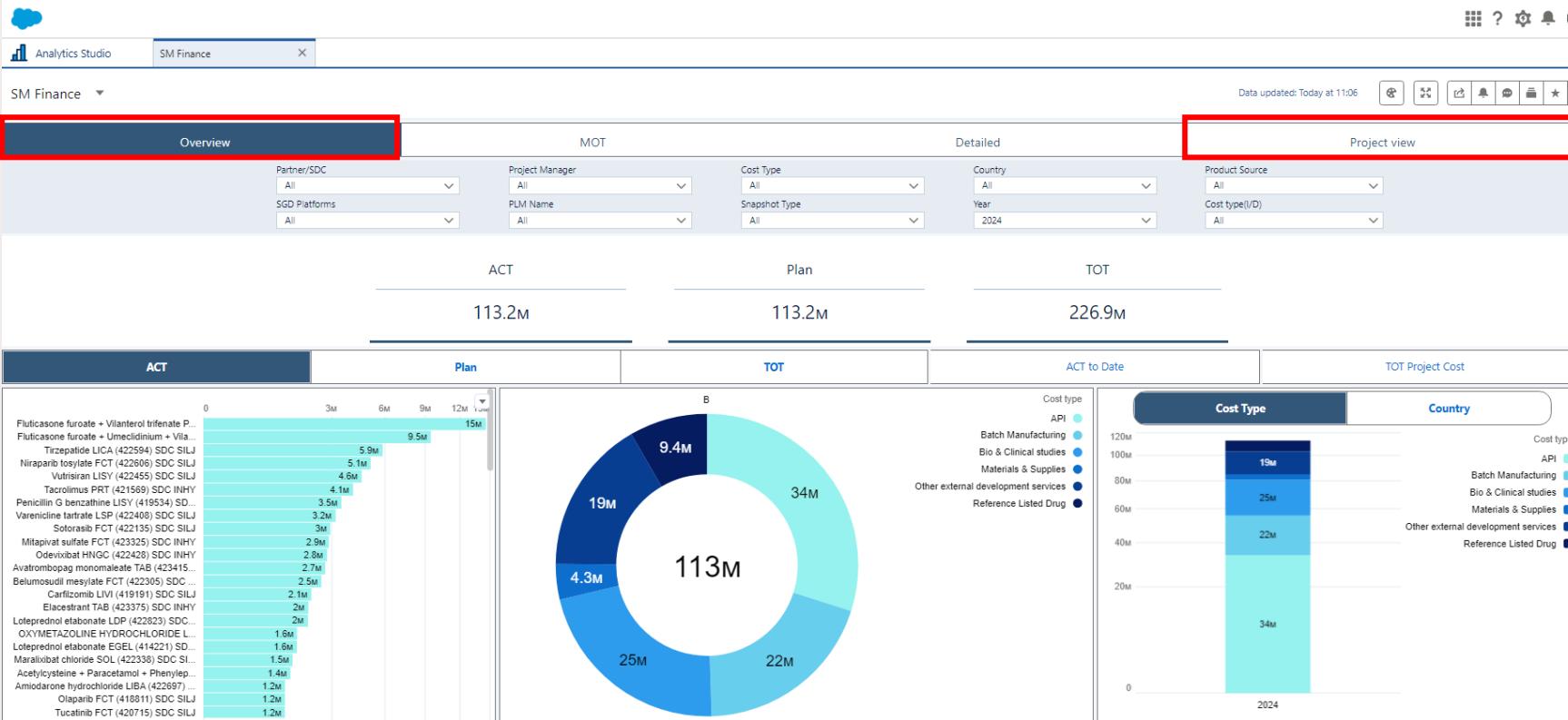
On the Project and Launch Management, **Budget Overview Tab** you can find the available snapshots at the bottom of the page – grouped by manual financial plan snapshots or monthly financial plan snapshots, which are taken automatically by the system when a new data load has been made.

The **Einstein Dashboard** will be used to access snapshot information. Dashboards have the benefit that they may also combine data from multiple projects. We will discuss this in the next section!

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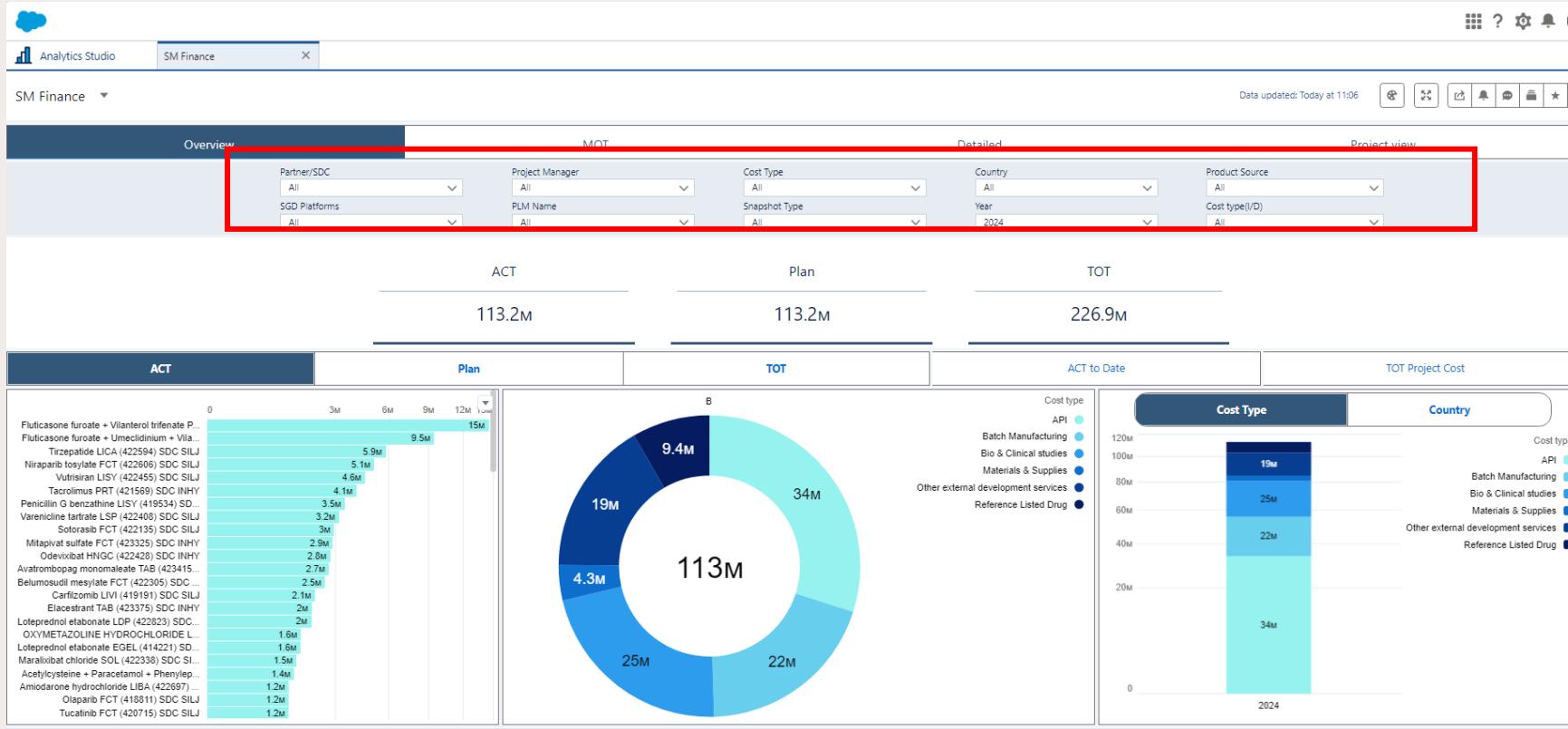
SM Finance Dashboard to facilitate the MOT (Monthly Outlook Transparency) meeting



For go-live the tabs „Overview“ and „Project view“ are ready to use.

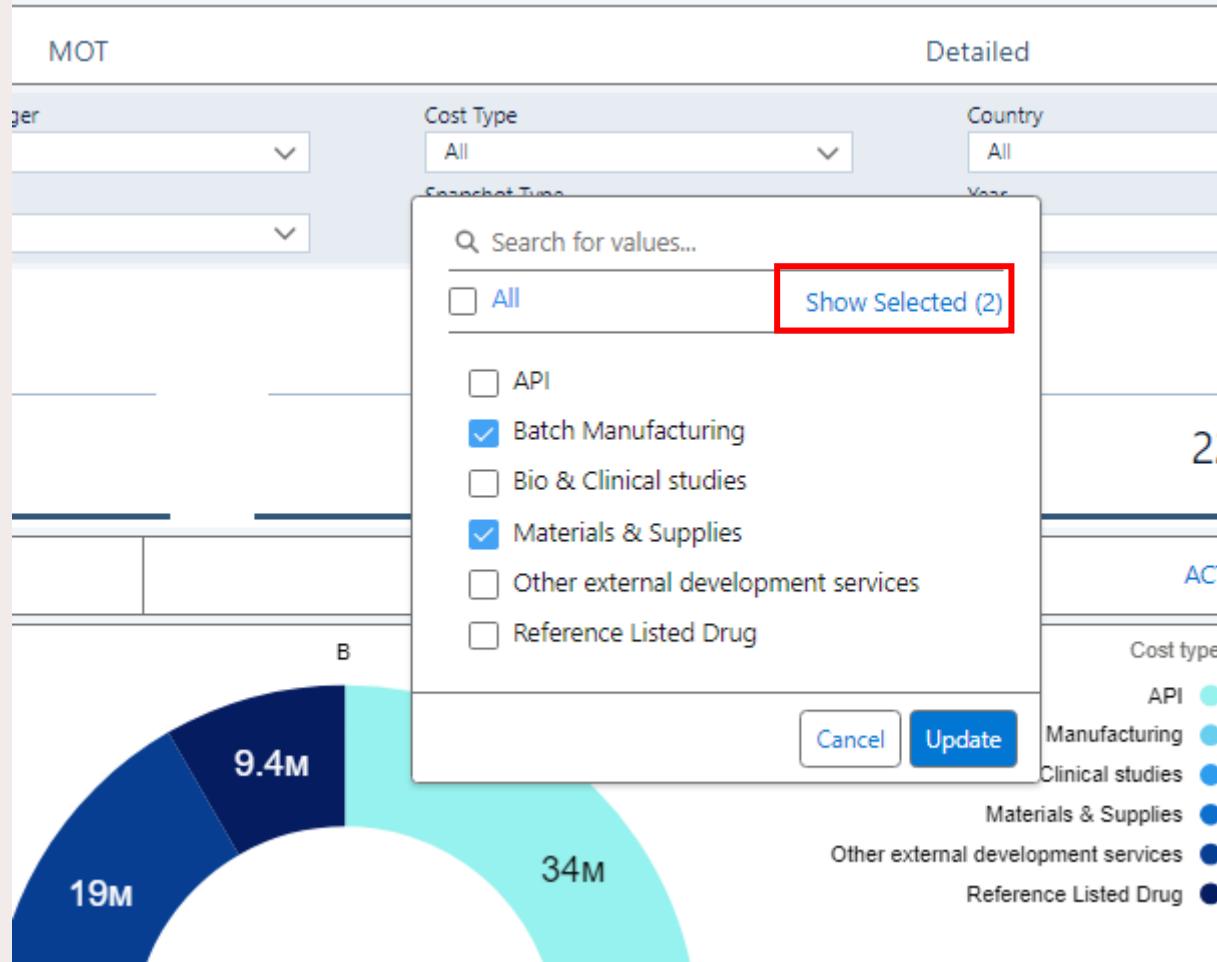
The tabs „MOT“ and „Detailed“ are still WIP!

SM Finance Dashboard – explore the filter options



You can select any of these filters and you can combine them as needed.

SM Finance Dashboard – explore the filter options



For each filter, you can select any combination of values or „show all“:

The displayed charts below will change according to your filter settings, when you click „Update“.

You can combine several filters with each other.

Budget Management Dashboard – explore the filter options on the overview tab

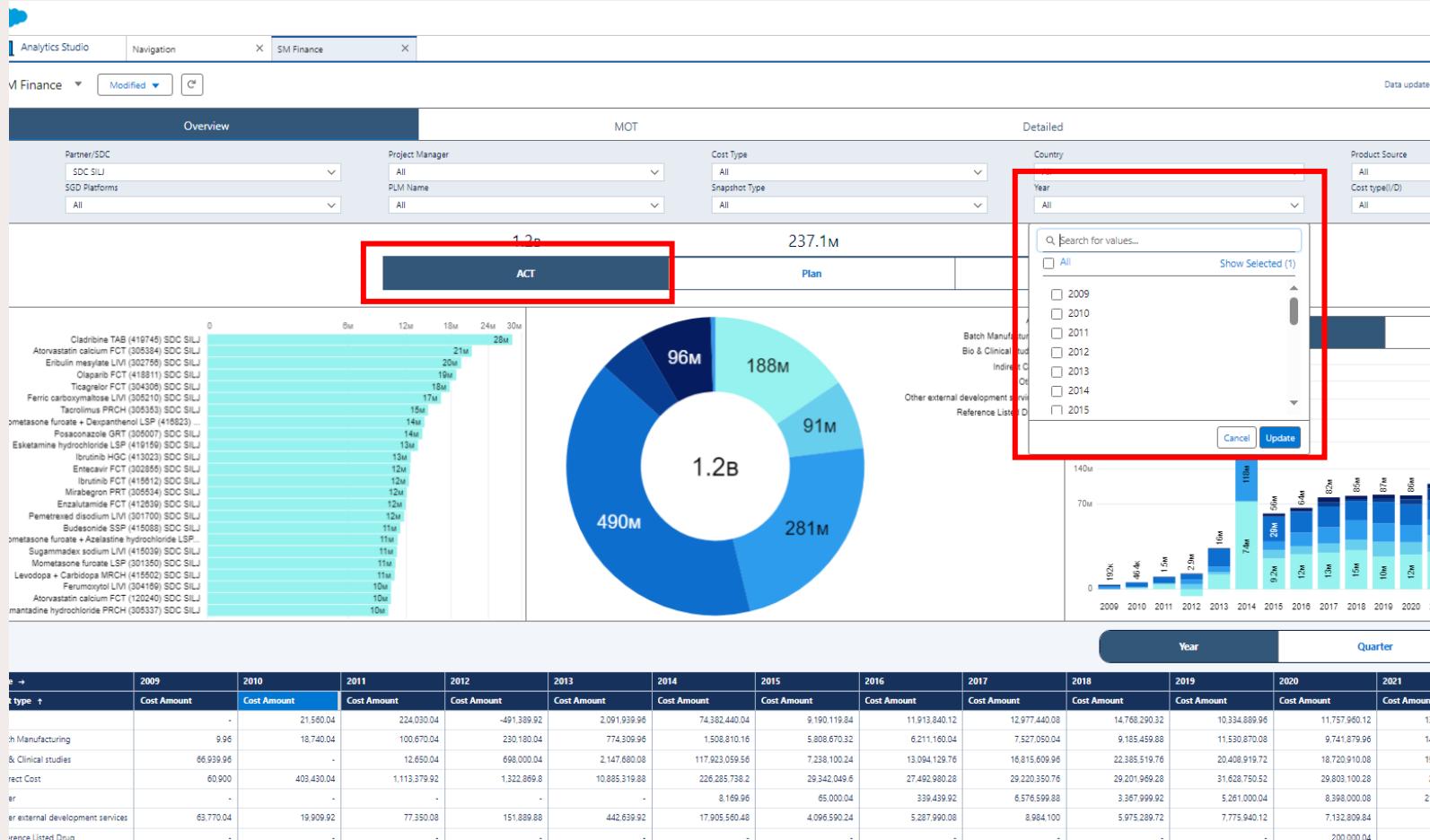
The button „modified“ appears and tells you that any filters have been applied

Here you can revert all filters or changes

The changes you made setting the filters are now applied to the charts

This dashboard provides a comprehensive overview of financial data across three main tabs: ACT, Plan, and TOT. The top navigation bar includes a 'Modified' button with a red border, indicating active filters. The 'Detailed' section on the right allows for filtering by Cost Type (Batch Manufacturing, Materials & Sup.), Country (All), Year (2024), and Product Source (All). The 'ACT' section displays a horizontal bar chart with values 26.5M, 26.5M, and 53.1M. The 'Plan' section shows a donut chart with segments of 4.3M, 22M, and 26M. The 'TOT' section features a stacked bar chart for the year 2024, with segments of 4.3M and 22M.

SM Finance Dashboard: Caveat: Do not combine „actuals“ and a future year / „Plan“ and past year



If you choose „Actuals“ from the buttons in the middle, do not choose any year in the future, since this would result in an empty screen.

The same mistake could happen with „Plan“ and a year in the past.

Only „Tot“ for „Totals“ is save to use with any yearly slice of the data

SM Finance Dashboard: Working with the dynamic table and using the data export option

The dashboard features several interactive components:

- Filters:** A dropdown menu for "Partner/SDC" with options "SDL SILJ" and "SDL Platfroms" highlighted with a red box.
- Chart Selection:** A chart titled "ACT" is highlighted with a red box.
- Timeframe Selection:** A dropdown menu for "Year" is highlighted with a red box.
- Dynamic Table:** A large table at the bottom is highlighted with a red box. It has columns for "Date →", years from 2009 to 2023, and "Cost type". The "Cost type" column includes categories like API, Batch Manufacturing, Bio & Clinical studies, Indirect Cost, Other, and Reference Listed Drug.
- Information Boxes:** Three dark blue boxes with white text provide instructions:
 - "Choose your data filters: e.g. SDL SILJ and „Actuals“"
 - "Choose the timeframe for the dynamically created table below"
 - "Export the content of the dynamically created table to Excel here"

Working with the dynamic table and data export option (Example: quarterly cost of 2011 actuals)

Your settings might result in a small table

1.1M

But the access to export functionality remains here

Choose „Share“ if you want to download data to Excel

Date →	2011 - Q1	2011 - Q2	2011 - Q3	2011 - Q4
Cost type ↑	Cost Amount	Cost Amount	Cost Amount	Cost Amount
API	56.007.51	56.007.51	56.007.51	56.007.51
Batch Manufacturing	25.167.51	25.167.51	25.167.51	25.167.51
Bio & Clinical studies	3.162.51	3.162.51	3.162.51	3.162.51
Indirect Cost	278.344.98	278.344.98	278.344.98	278.344.98
Other external development services	19.337.52	19.337.52	19.337.52	19.337.52

	200k	10fk	224k
Year	0	2011	
Quarter			
Month			

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| Cost Amount |
|-------------|-------------|-------------|-------------|-------------|-------------|
| 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 |
| 31 | 32 | 33 | 34 | 35 | 36 |
| 37 | 38 | 39 | 40 | 41 | 42 |
| 43 | 44 | 45 | 46 | 47 | 48 |
| 49 | 50 | 51 | 52 | 53 | 54 |
| 55 | 56 | 57 | 58 | 59 | 60 |
| 61 | 62 | 63 | 64 | 65 | 66 |
| 67 | 68 | 69 | 70 | 71 | 72 |
| 73 | 74 | 75 | 76 | 77 | 78 |
| 79 | 80 | 81 | 82 | 83 | 84 |
| 85 | 86 | 87 | 88 | 89 | 90 |
| 91 | 92 | 93 | 94 | 95 | 96 |
| 97 | 98 | 99 | 100 | 101 | 102 |

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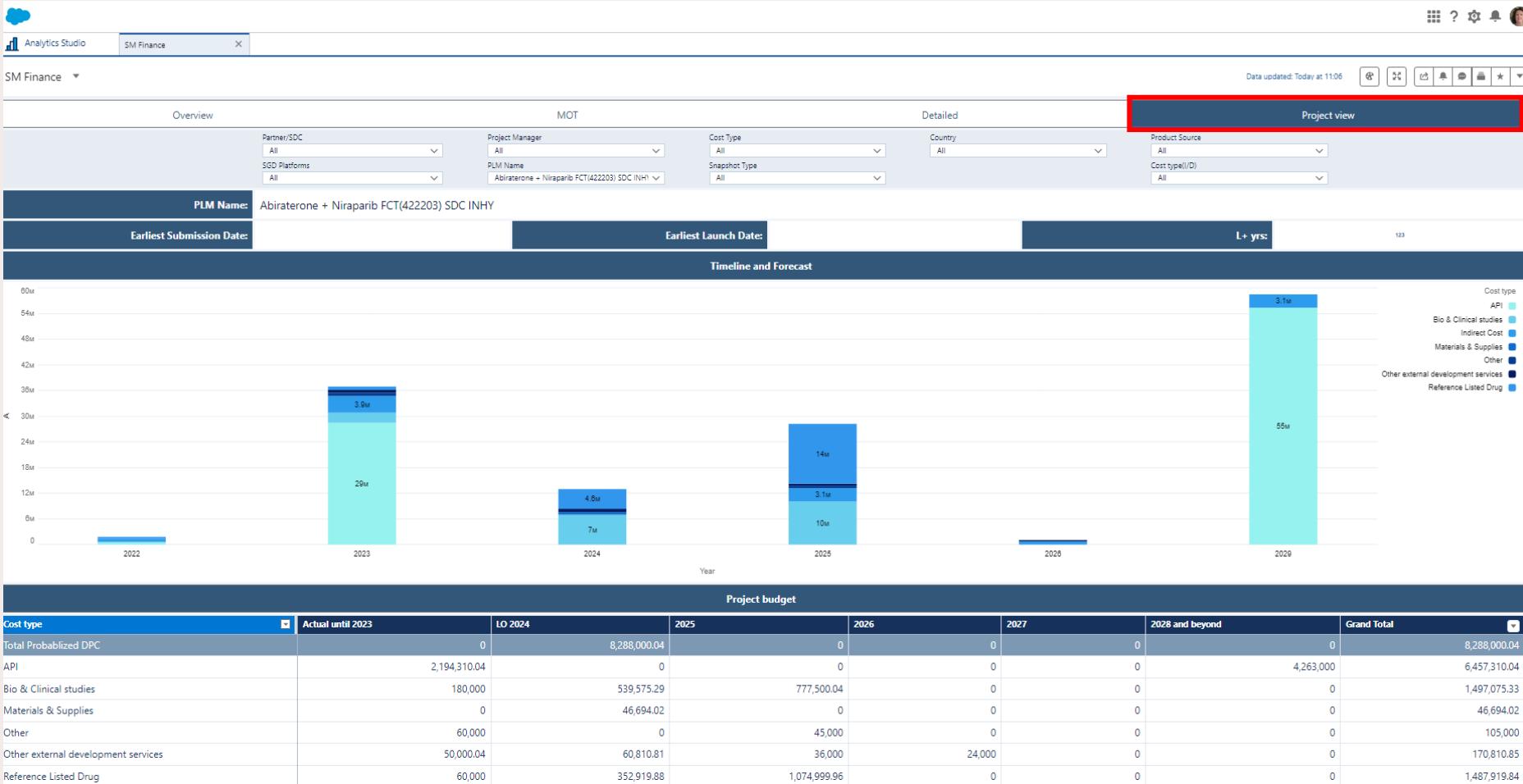
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SM Finance Dashboard for MOT preparation: The „Project view“ tab



Use this tab to explore various data about an individual project.

SM Finance Dashboard: The „Project view“ tab replaces the standard ppt template

Grand totals per line, e.g. Cost type / probabilized and unprobabilized as well as indirect cost

Project budget							
Cost type	<input checked="" type="checkbox"/> Actual until 2023	LO 2024	2025	2026	2027	2028 and beyond	Grand Total
Total Probabilized DPC		0	8,288,000.04	0	0	0	8,288,000.04
API		2,194,310.04	0	0	0	4,263,000	6,457,310.04
Bio & Clinical studies		180,000	539,575.29	777,500.04	0	0	1,497,075.33
Materials & Supplies		0	46,694.02	0	0	0	46,694.02
Other		60,000	0	45,000	0	0	105,000
Other external development services		50,000.04	60,810.81	36,000	24,000	0	170,810.85
Reference Listed Drug		60,000	352,919.88	1,074,999.96	0	0	1,487,919.84
Total Unprobabilized DPC		2,544,310.08	1,000,000	1,933,500	24,000	4,263,000	9,764,810.08
Indirect Cost		300,000	0	240,000	60,000	240,000	840,000
Total Unprobabilized DPC + Indirect Cost		2,844,310.08	1,000,000	2,173,500	84,000	4,503,000	10,604,810.08

Indirect cost included

Yearly split of all line items; with actuals summed up until previous year

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Next steps

Go live 15th of May: SANITY becomes the source of truth for project budgets!

- Training sessions 13.5. - 15.5.: joint sessions for BPAs and Project Managers
- Weekly check-in sessions for Q&A scheduled for support and feedback

Next steps after this training session:

- Familiarize yourself with SANITY Budget Management! Get your questions into the weekly check-in sessions. The SANITY Team will collect feedback for improvements to further shape SANITY according to your needs.
- May LF2 data will be uploaded to SANITY by Data Stewards team once available.
- PMs and BPAs to vet the migrated data in SANITY after this upload.
- June and July: MOT will be **executed based on SANITY data** (with Excel files as backup).

The final cutover (i.e. exclusive use of SANITY) is planned for 1st of August.

Spirit user de-activation will happen end of May! SANITY is the new place to be...

It is essential to start maintaining your updates in SANITY and work with the system so that you are fully knowledgeable of all new aspects.

S A N D O Z