EXOSTAR® UNIVERSITY

Boeing 787 SCMP Planning Schedules Guide

July 2023

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DOCUMENT VERSIONS

Version	Change Overview	Date	Responsible Party
1	Formatting Updates	08/01/22	Ashleigh Howell
2	Harmony Upgrade	07/07/23	Ashleigh Howell

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Planning Schedules Overview

This guide provides information and instructions on the Planning Schedules function in the Boeing 787 SCMP application. To include how to:

- Activate/Deactivate
- Data Input
- Download/Upload
- Response
- Publish
- View

Planning Schedules Visibility Solution

The Consuming Partner publishes a Planning Schedule to indicate their requirements to the Providing Partner and Boeing.

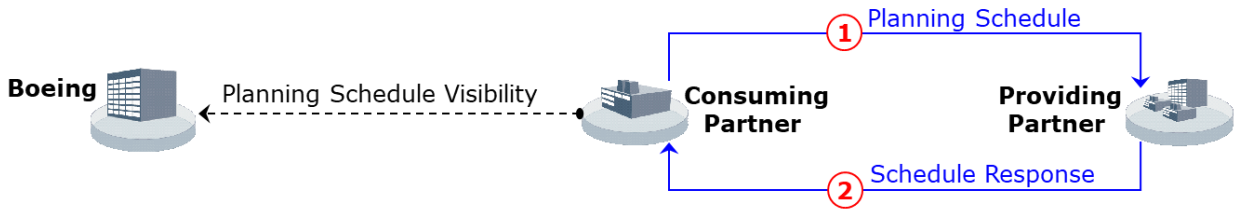
The Planning Schedule data includes part number, quantity, date needed, and delivery site.

The Providing Partner responds to the requirements with a Planning Schedule Response.

Boeing has visibility of Planning Schedules for inventory and supply planning.

The Planning Schedule has an 18-month planning horizon:

- The first six months are daily buckets.
- The second six months are weekly buckets.
- The third six months are monthly buckets.



Collaboration Definition

Boeing 787 SCMP organizes data via Collaborations or Collabs:

- **Dimensions**: A Collaboration is described by a unique combination:
  - Customer + Site + Part Number (Customer & Supplier) + Supplier.
- **Attributes**: Represents supporting data that relates to the Collaboration.

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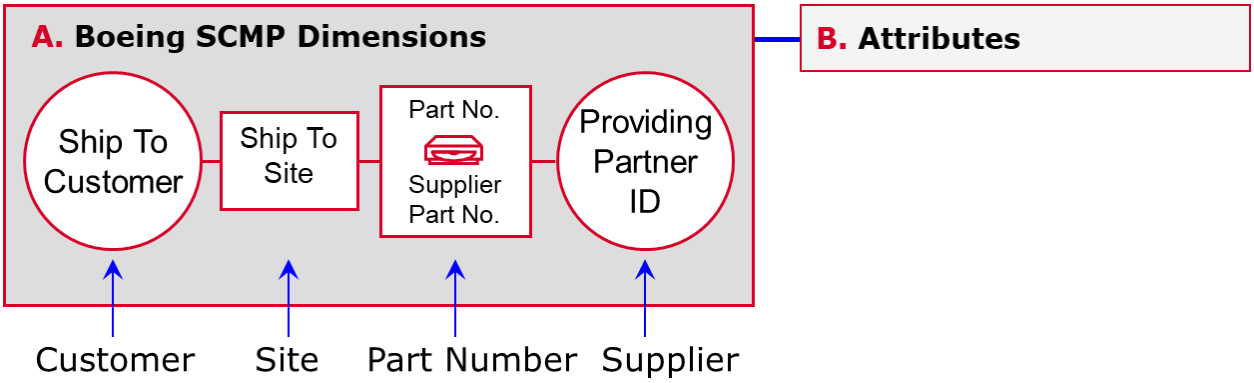
- **Collab Attributes**: Irrespective of time, for example, Buyer or Partner address data like Number, Street, City, etc.
- **PIT Attributes**: Can change depending on time; for example, delivered quantity, past due quantity, MRP requirements, etc.

Please note, data in blue is clickable to view additional information. Use the menu to navigate to the **Supply Planning → Search** workflow to view an MCV page.

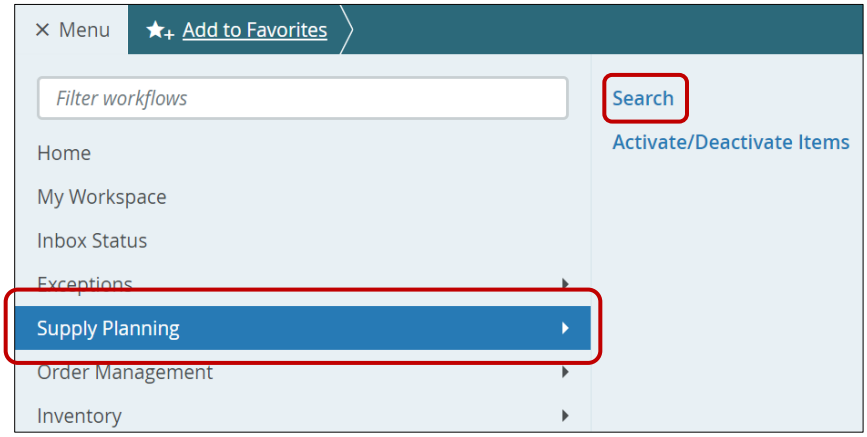


VIEW PLANNING SCHEDULES

View via Search

To view a planning schedule via search:

1. From the menu, select **Supply Planning → Search**.



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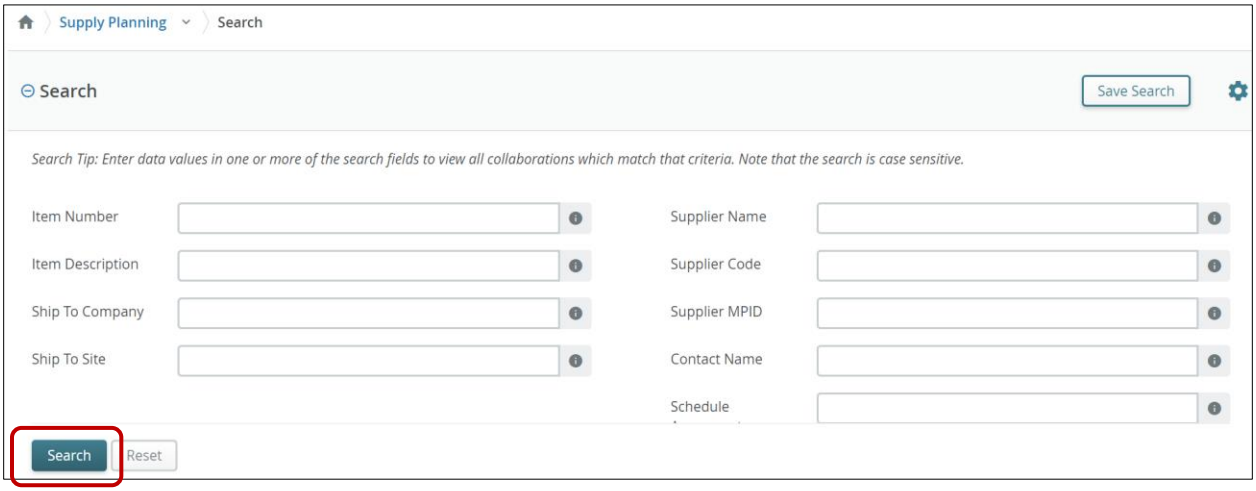
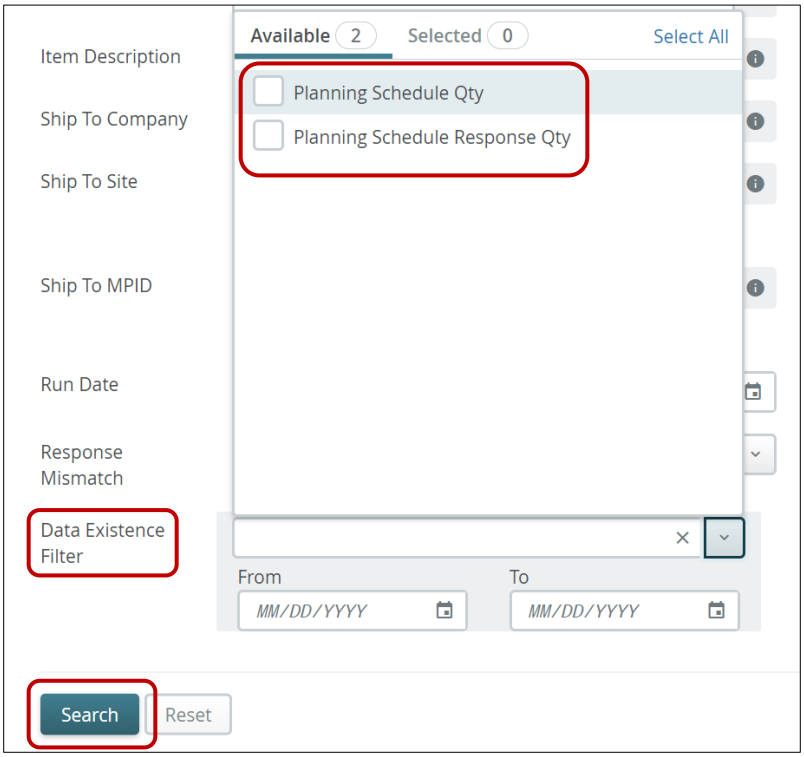
2. Enter your search criteria. Click the **Search** button.



3. Optionally, use the **Data Existence Filter** to only return search results for items with data in the quantity fields you select and for the date ranges you set. Click **Search**.



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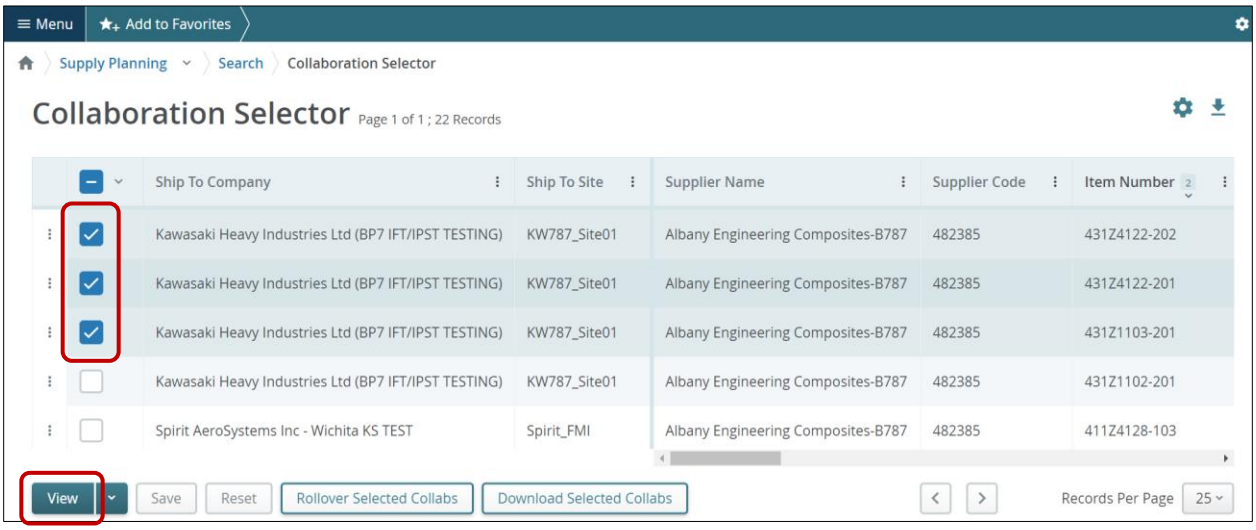
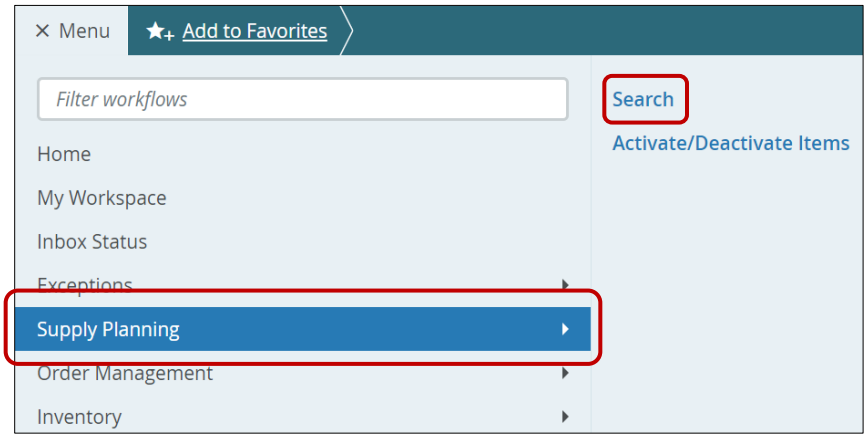
4. Place checkmarks next to the desired items. Click the **View** button to display the MCV page.



View Discrete or Blanket Purchase Order from Schedule

To view a Discrete or Blanket Order from the Planning Schedule:

1. From the menu, select **Supply Planning** → **Search**.



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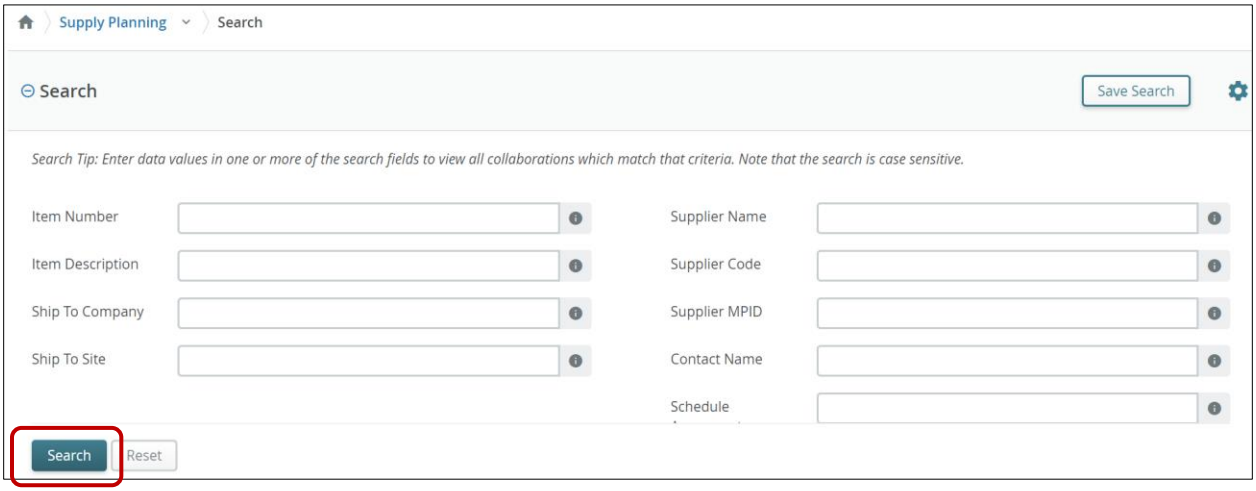
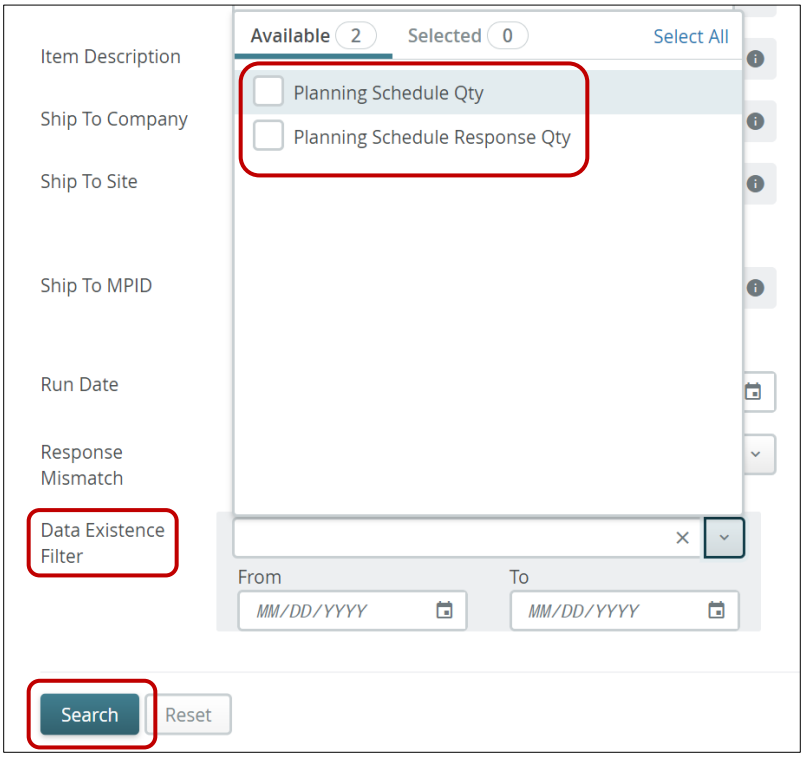
2. Enter your search criteria. Click the **Search** button.



3. Optionally, use the **Data Existence Filter** to only return search results for items with data in the quantity fields you select and for the date ranges you set. Click **Search**.



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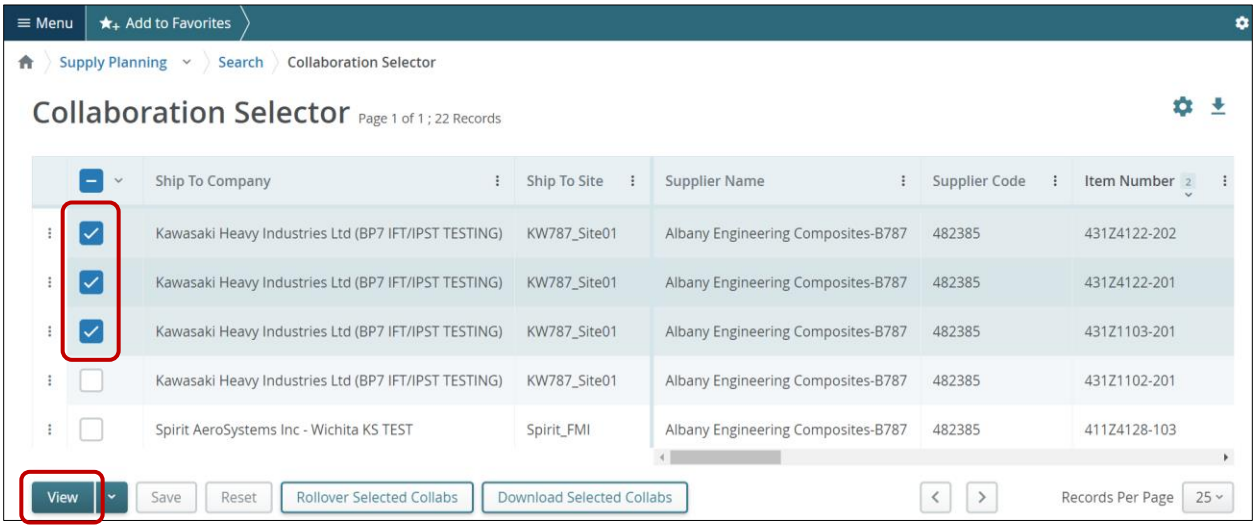
4. Place checkmarks next to the desired items. Click the **View** button to display the MCV page.



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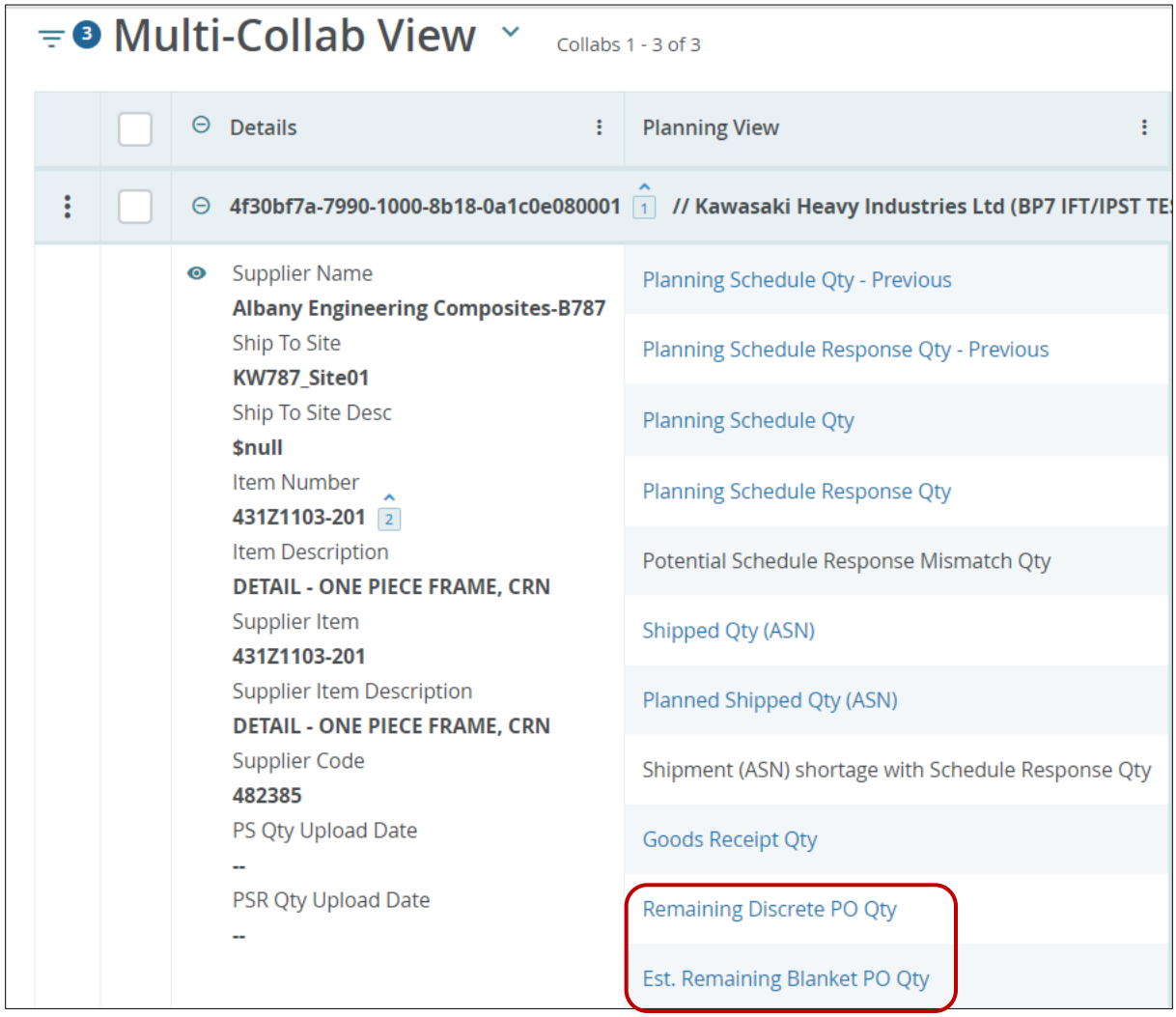
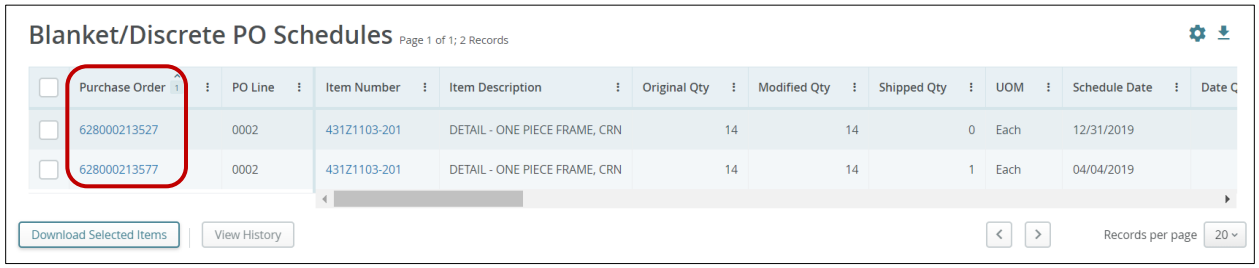
5. On the MCV page, scroll down and click the **Remaining Discrete PO Qty, Est. Remaining Blanket PO Qty** data measures, or a corresponding **PIT**, to view an associated PO without navigating off the MCV page.



6. Select the hyperlinked **Purchase Order** to view.



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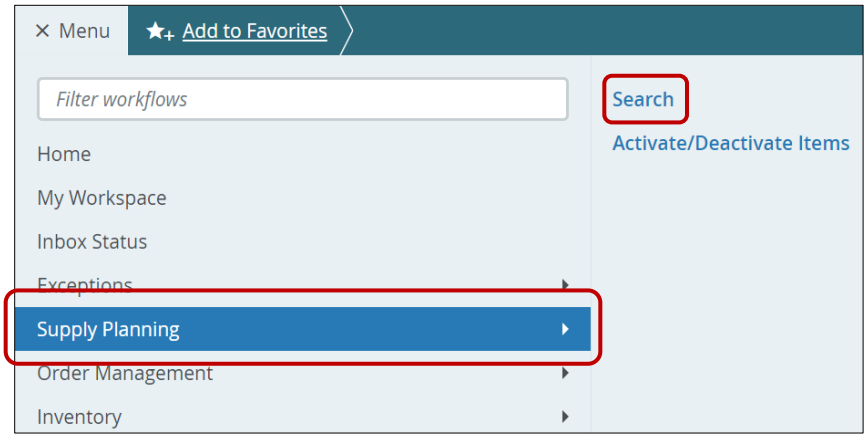
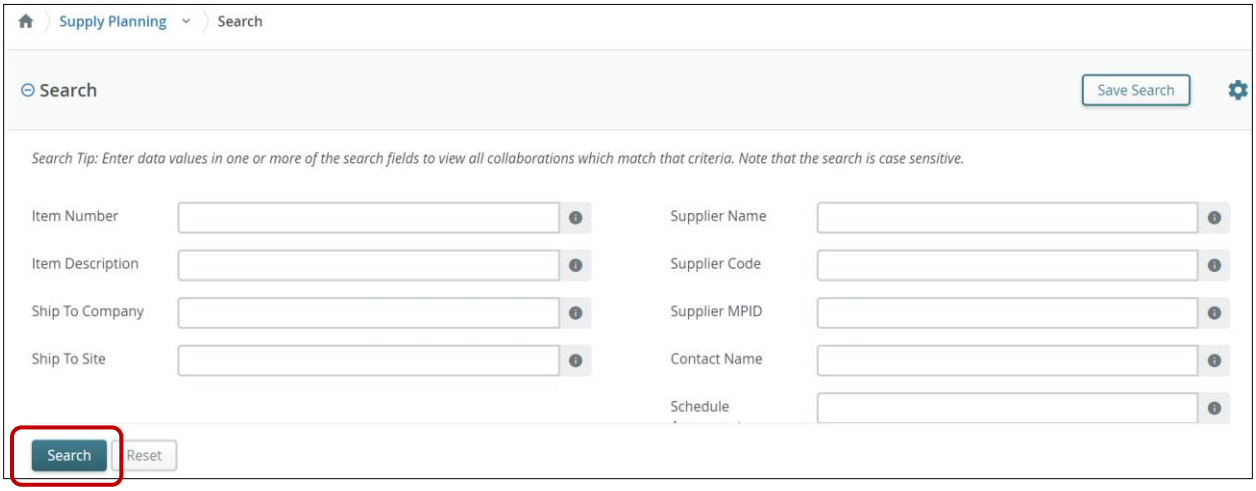
View Reverse Logistics PO from Schedule

To view a Reverse Logistics PO from the Planning Schedule:

1. From the menu, select **Supply Planning** → **Search**.



2. Enter your search criteria. Click the **Search** button.



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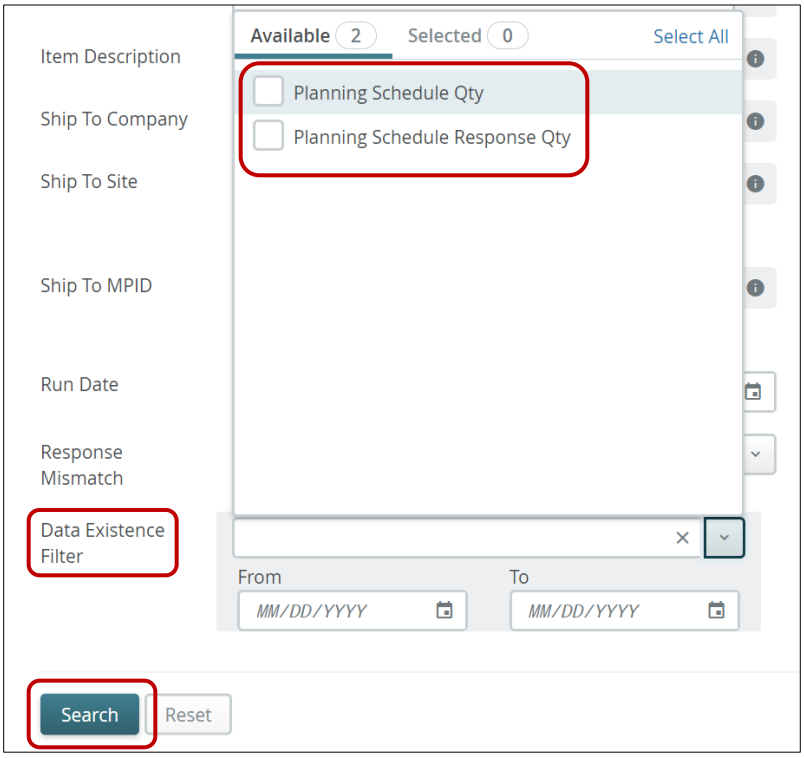
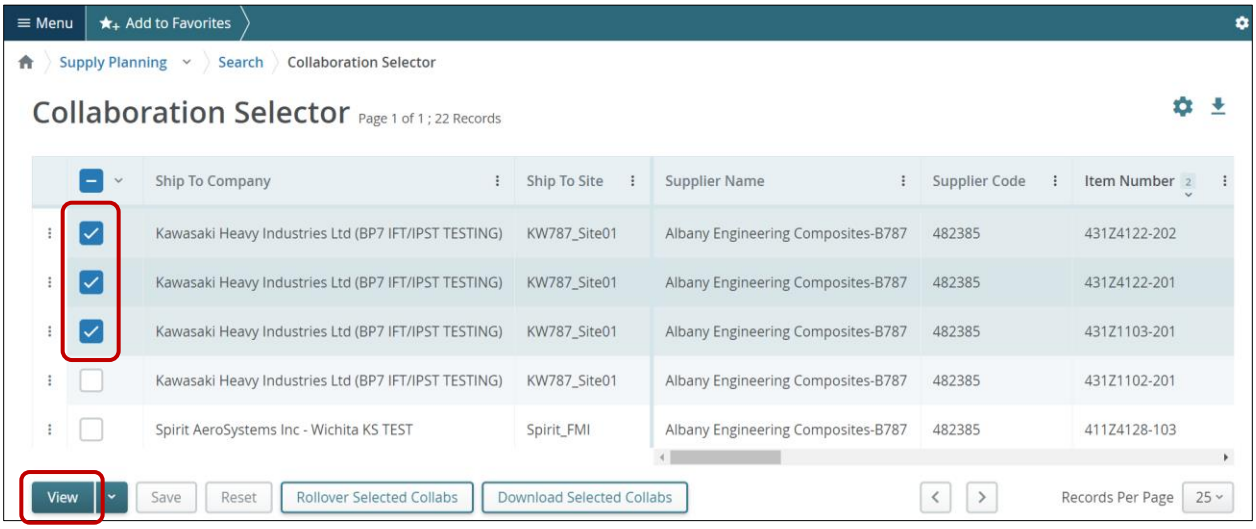
3. Optionally, use the **Data Existence Filter** to only return search results for items with data in the quantity fields you select and for the date ranges you set. Click **Search**.



4. Place checkmarks next to the desired items. Click the **View** button to display the MCV page.



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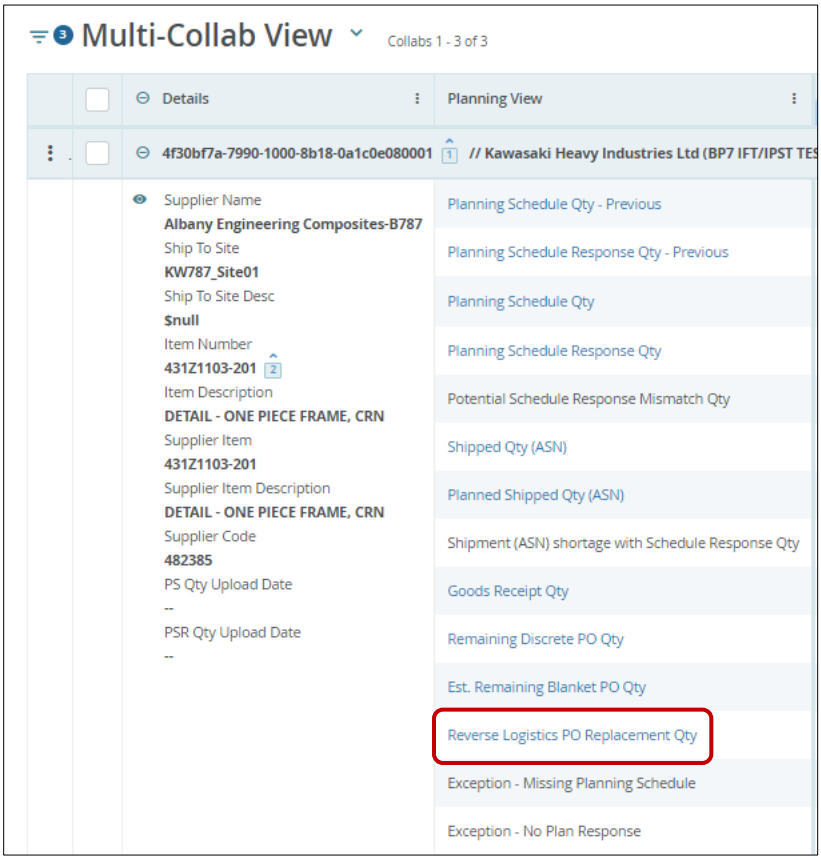
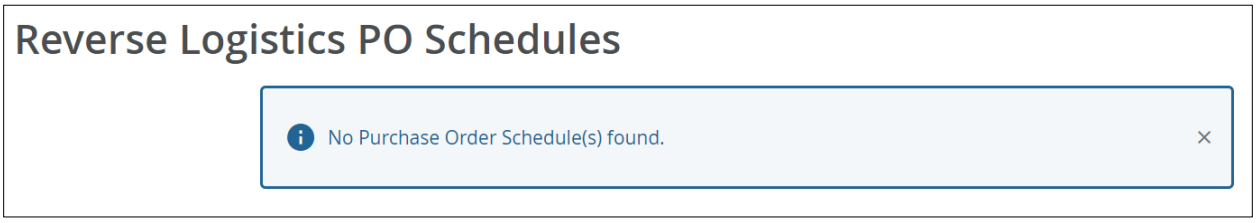
5. On the MCV page, click the **Reverse Logistics PO Replacement Qty** data measure, or a corresponding **PIT,** to view an associated Reverse Logistics PO without navigating off the MCV page.



6. Select the hyperlinked **Purchase Order** to view.

NOTE: If there are not any associated Purchase Orders, the following message displays:



PLANNING SCHEDULE INPUT – CONSUMING PARTNERS / BOEING SUPER BUYERS

Input Data via Time Buckets

To input Planning Schedule data via time buckets:

1. Navigate to an MCV page. Scroll to the right to view **Time Buckets** in the **Planning Schedule Qty** line item.

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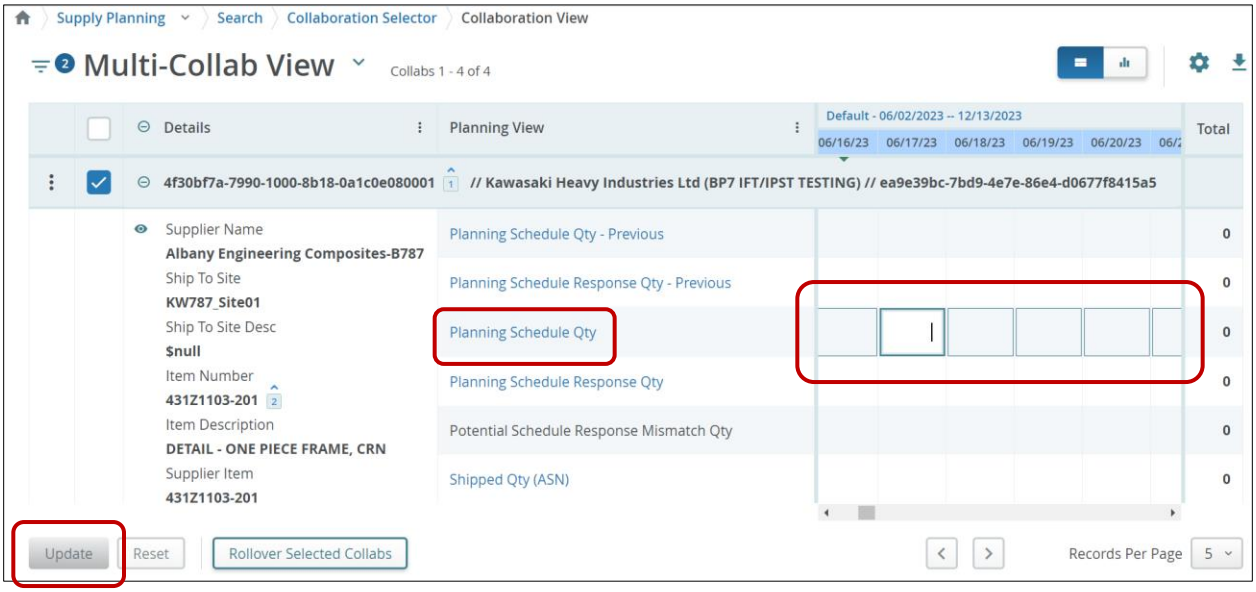
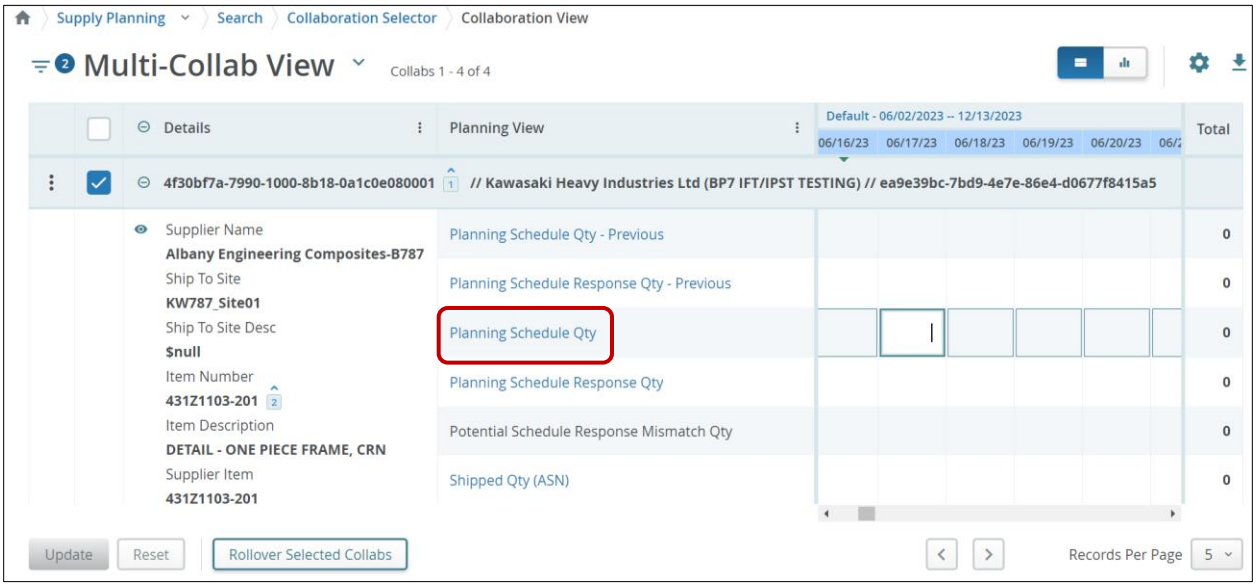
2. Enter data into the appropriate time buckets. Click the **Update** button.



Input Data via Data Measure

To input Planning Schedule data via Data Measure:

1. Click the **Planning Schedule Qty** data measure name.



2. In the **Quantity** column, enter the desired value.
3. Optionally, scroll over and enter a **Receiver Reference Number**.

NOTE: When the Consuming Partner enters a Receiver Reference Number, the Providing Partner must use it in the Shipment data.

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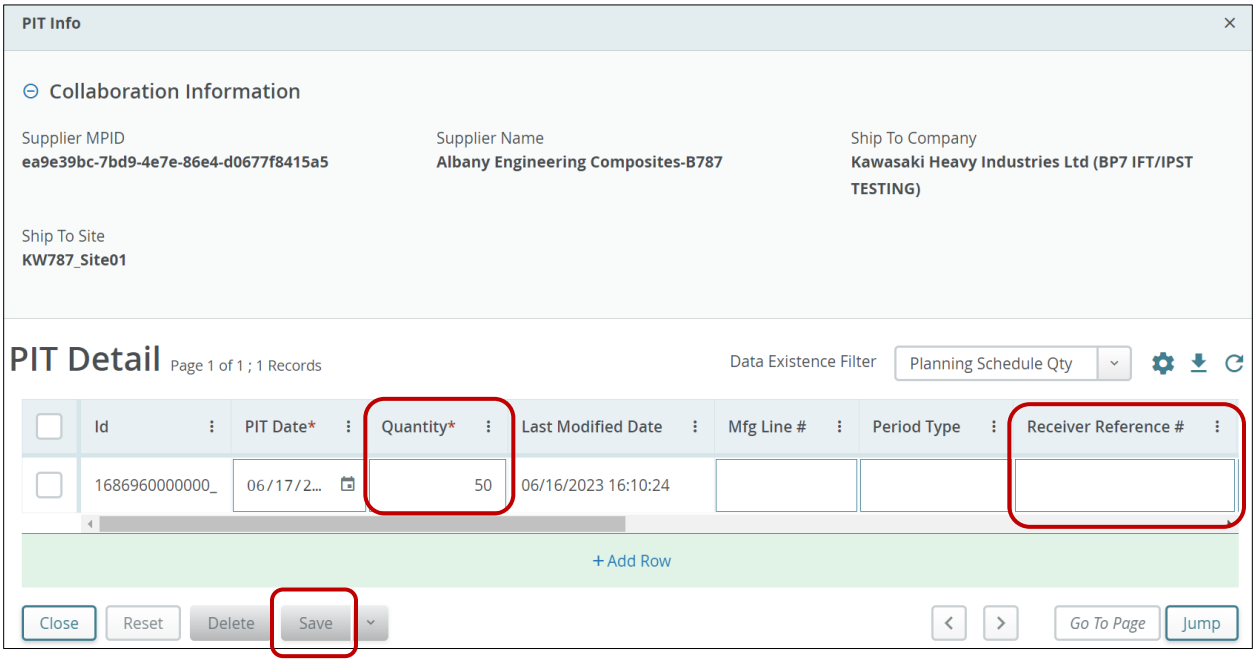
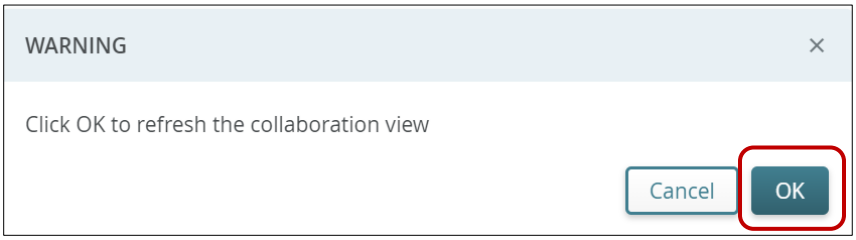
4. Click the **Save** button.



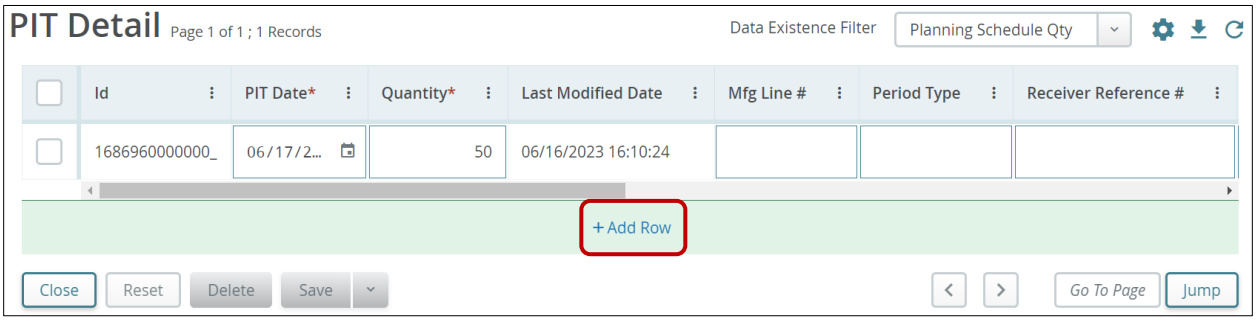
5. Click the **OK** button to acknowledge the changes.



PIT Info and Detail Page

This information is for **Consuming Partners** and **Provider Partners ONLY**. To add a row of PIT Info:

1. On the **PIT Info** screen, click **+ Add Row**.



2. Input desired data in the fields provided.

NOTE: Scroll to the right for additional fields.

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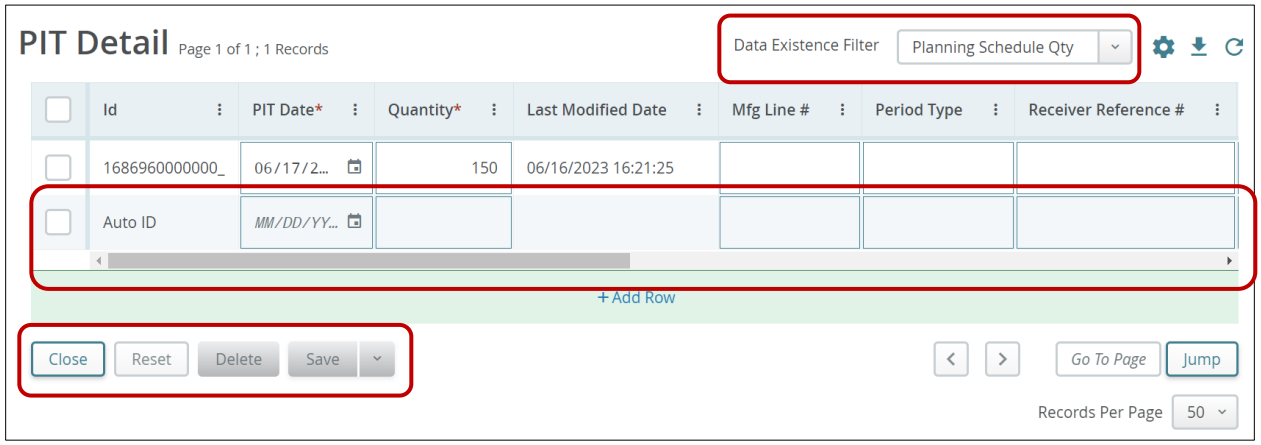
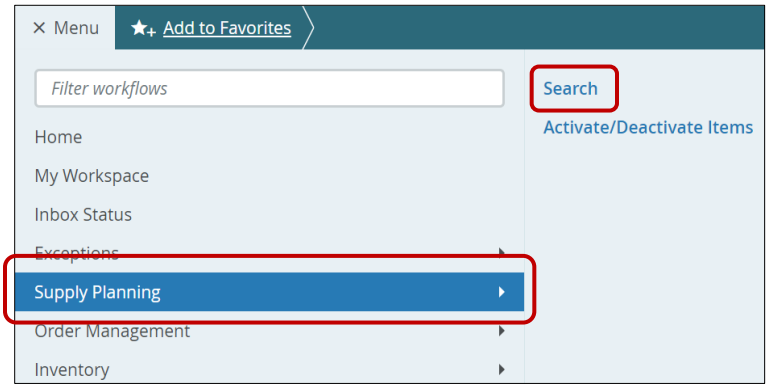
3. **Data Existence Filter** changes which field has data populated so it is on the list.
4. **Reset** returns values back to original, until the **Submit** button is clicked.
5. **Delete** removes the selected row.
6. Once complete, click the **Save** button to send to Boeing.

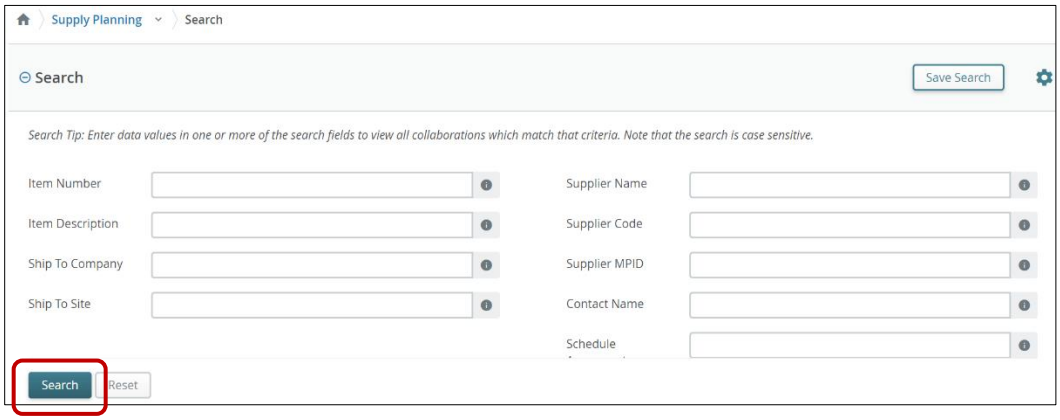


To copy PITs:

1. From the menu, select **Supply Planning → Search**.



2. Enter your filter or search criteria. Click **Search**.



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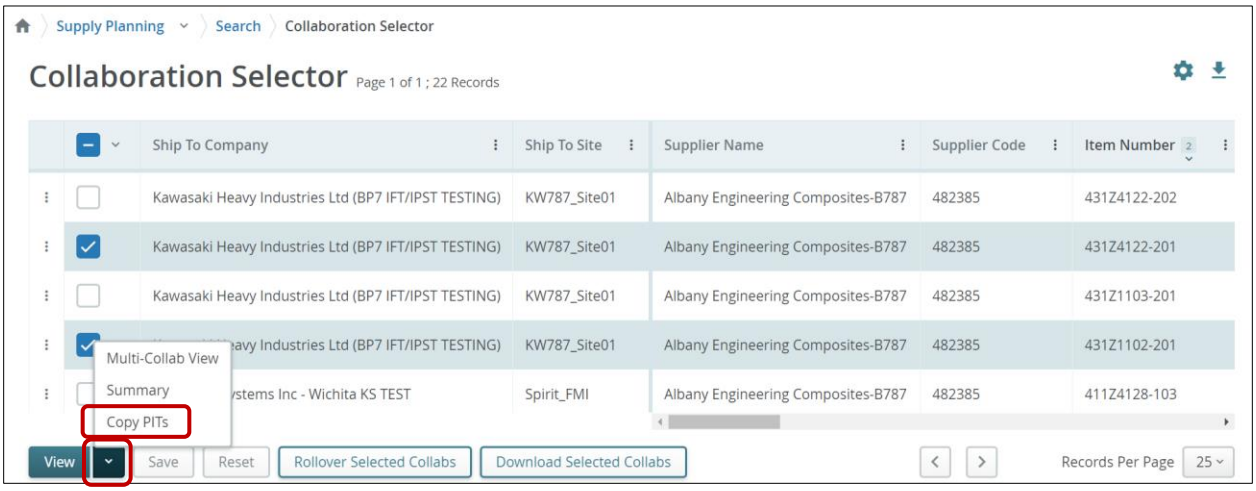
3. Place checkmarks next to the desired line items. Select **Copy PITs** from the drop-down menu next to the **View** button.



4. Set the desired **Start Date** and **End Date**.

NOTE: The **Start Date** cannot be a past date. Changes cannot be made to past dates.

5. From the **Source** pull down menu, choose **Planning Schedule Qty** or other appropriate **Data Measure** you wish to copy.
6. In the **Target** list, click the **Planning Schedule Response Qty** or other appropriate **Data Measure** to which the data will be copied.

IMPORTANT! When you select from the Target drop-down, the selection displays in yellow and does not populate in the blue bubble as it should. To populate the Target Selection, click into the Source or Date fields.

7. Click the checkbox next to **Copy Attributes** if you would also like to copy data measure attributes (e.g., Receiver Reference #, Mfg Line #).

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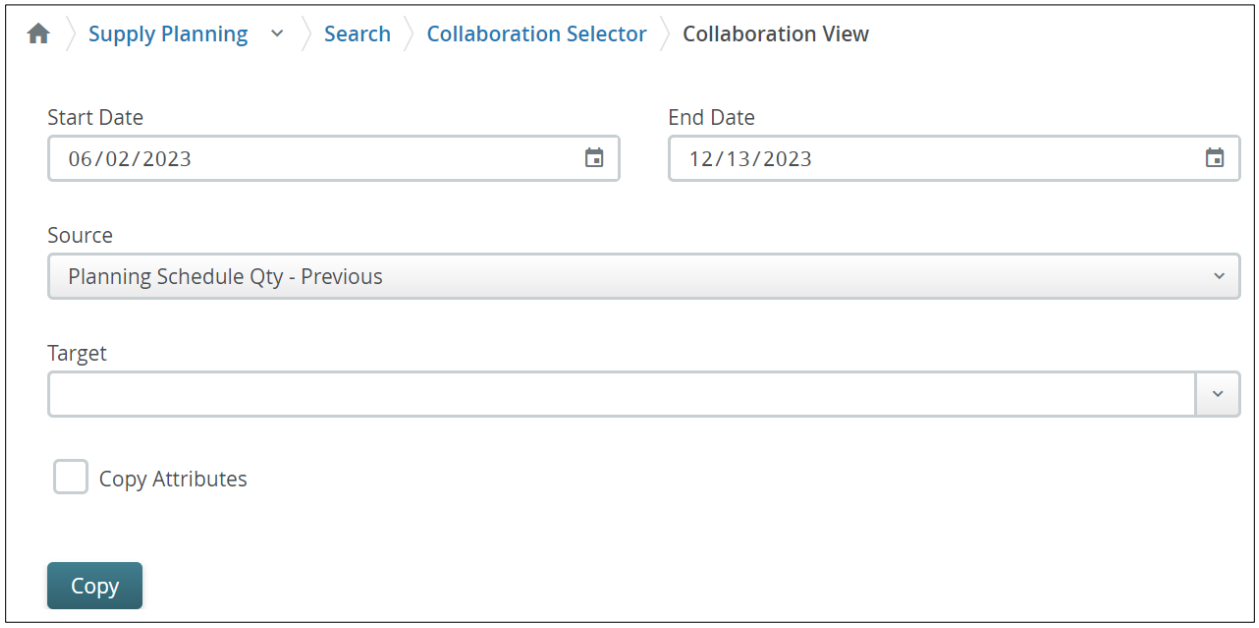
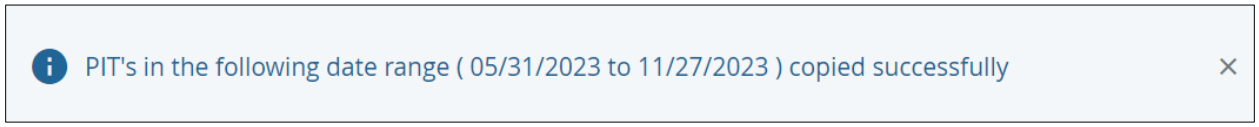
8. Click the **Copy** button.

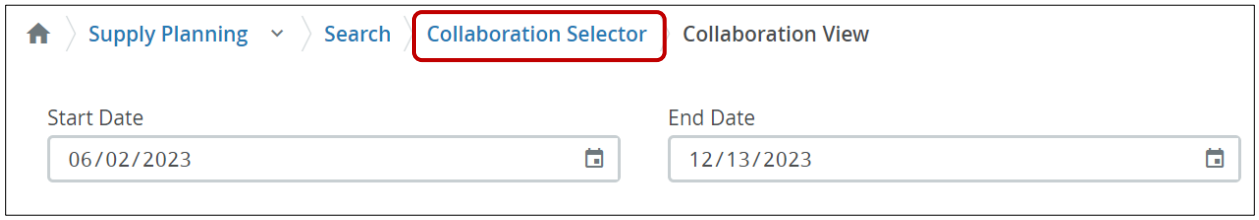


NOTE: A confirmation message displays.



9. Click either **Multi-Collab View** or **Collaboration Selector** in the **History Path**.

NOTE: Your choice will depend on where you started the Copy PITs process.



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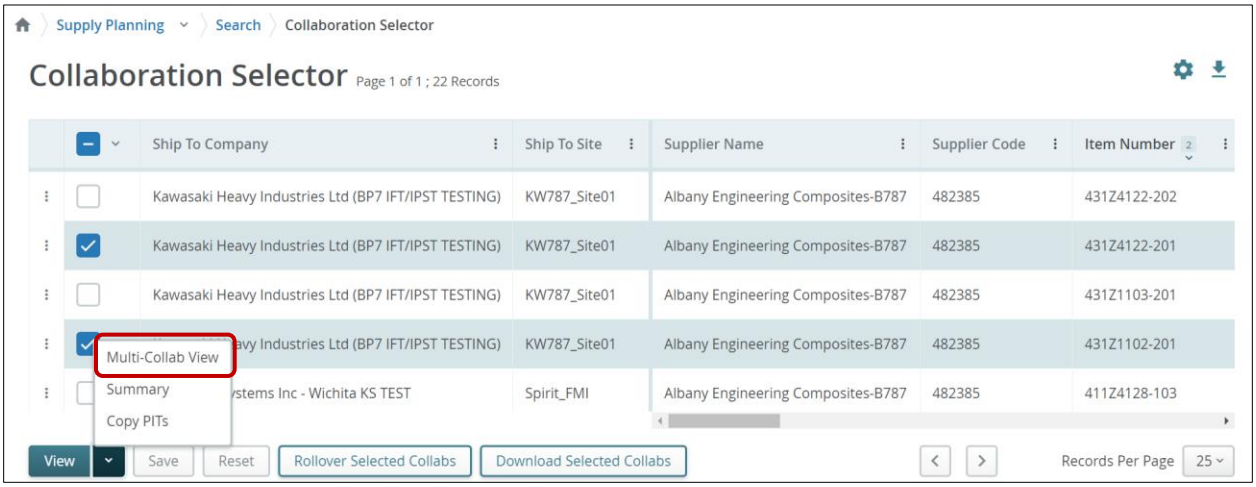
10. If you did not return to the MCV page, change the **Go** to dropdown back to **Multi-Collab View**, and click the **View** button.



NOTE: For the specified date range, the data in the **Source** line was copied to the **Target** line.

Download Planning Schedules

There are multiple ways to download Planning Schedules in the 787 SCMP application:

- Planning Schedule Download (Excel Format with 5000 record limit)
- Planning Schedule Download (Flat File Format)
- Planning Schedule UI Export

Planning Schedule Download (Excel Format with 5000 Record Limit) or Flat File Format

To download a Planning Schedule in Excel format with a 5000-record limit OR in a Flat File format:

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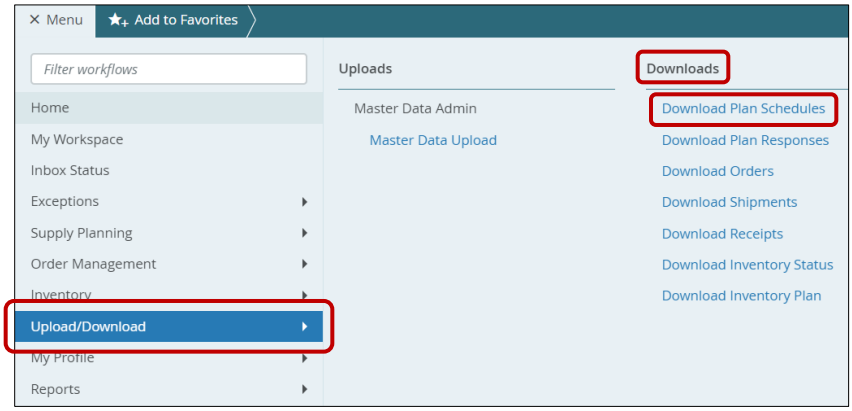
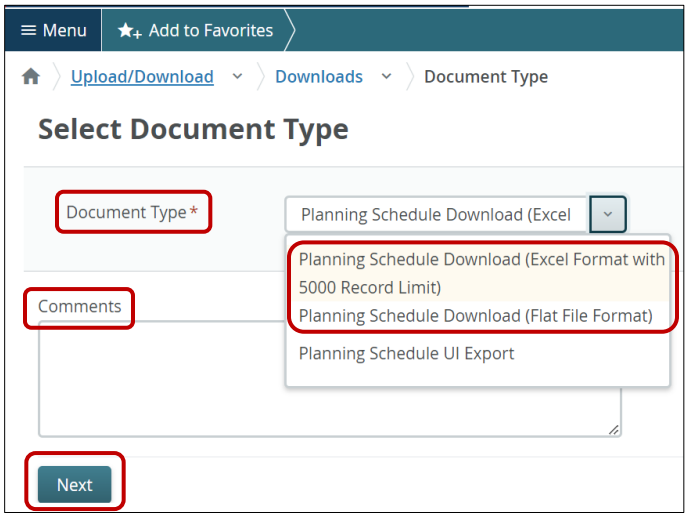
1. From the menu, select **Upload/Download → Downloads → Download Plan Schedules**.



2. Select **Planning Schedule Download (Excel Format with 5000 Record Limit)** or **Planning Schedule Download (Flat File Format)** from the **Document Type** drop-down menu.
3. Optionally, enter a **Comment** to reference your download. Click the **Next** button.

NOTE: For example, if you execute multiple downloads, entering "Item 123", then "Item 789", will help you to differentiate your downloads.



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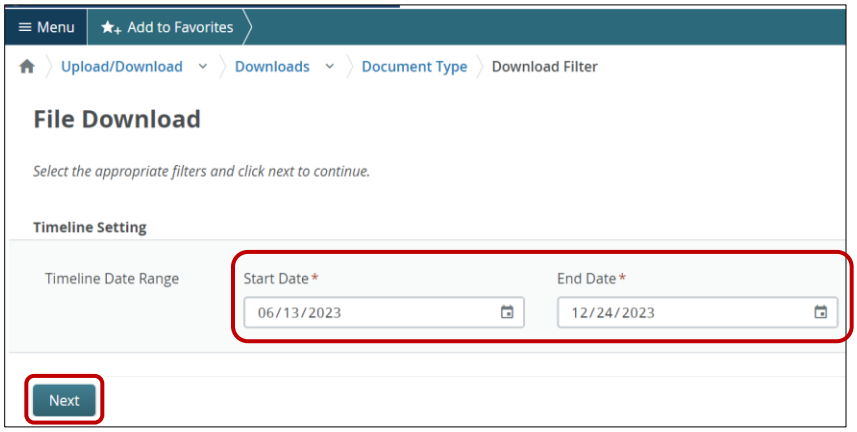
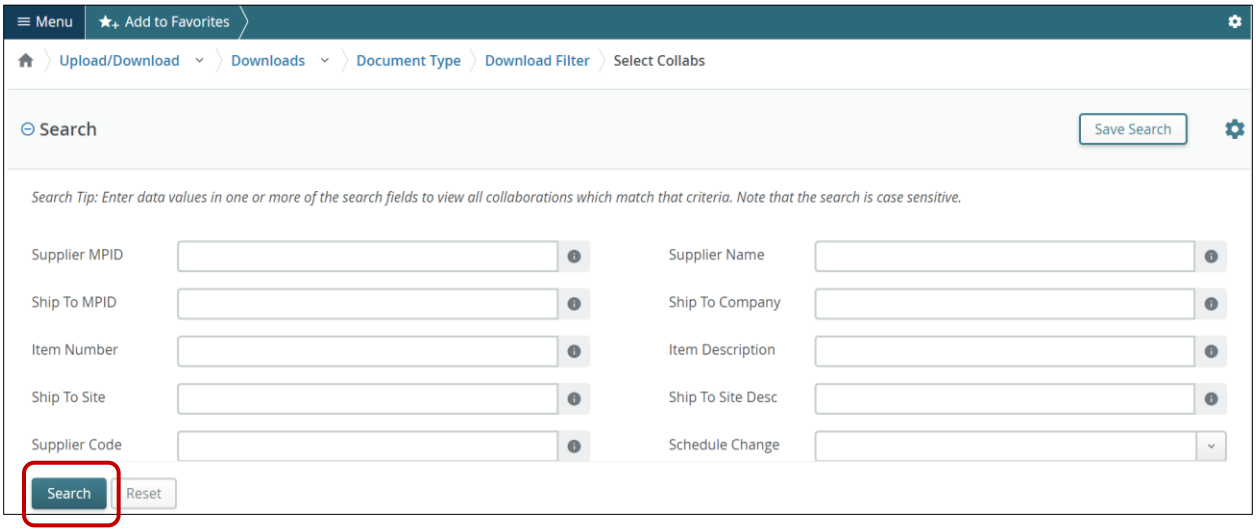
4. Select the **Start Date** and **End Date**. Click the **Next** button.



NOTE: If you use a date range less than the entire Planning Schedule horizon, when you upload your changes, Planning Schedule data outside your selected date range is purged.

5. Input desired search criteria. Click **Search**.



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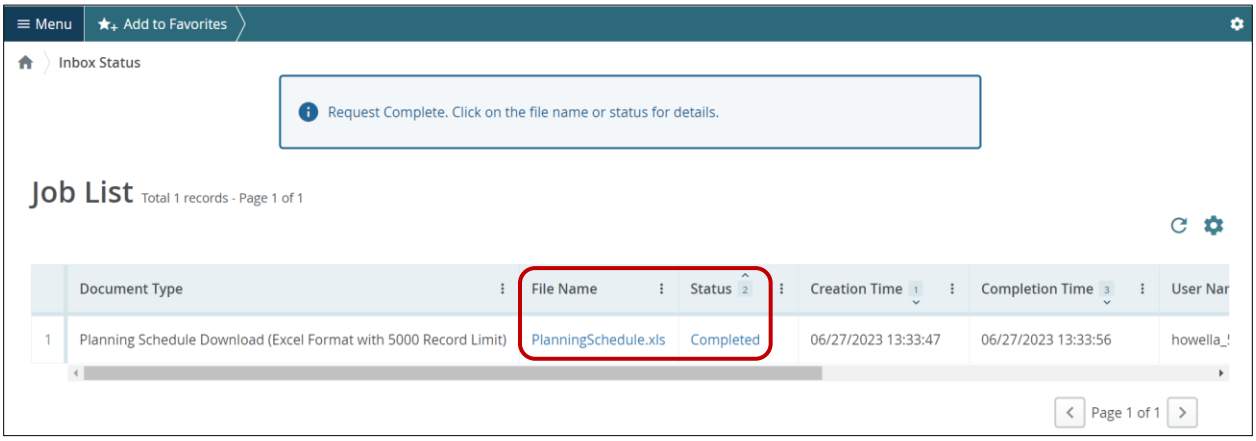
6. The **Job List** page displays the status of your download. Once **Completed**, click the **File Name** to open.

NOTE: If there are errors in the download process, the status displays red. Click the status to view the errors.



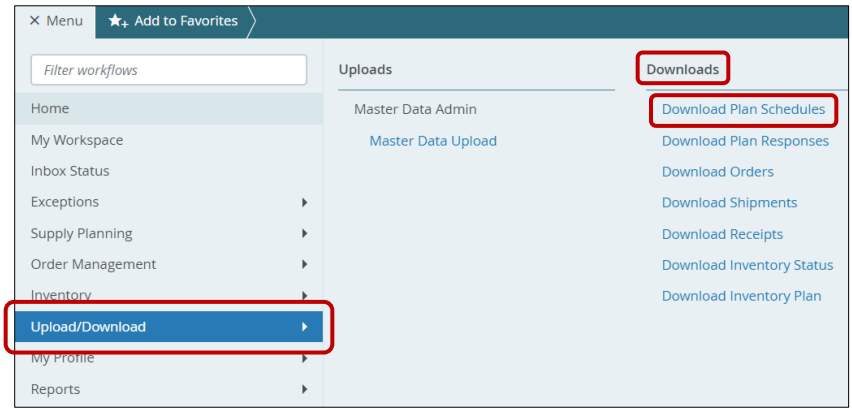
Planning Schedule UI Export

The Planning Schedule UI Export option allows Consuming Partners to pre-define search criteria using a Default Export selection or a My Favorite Templates selection.

Default Export

To complete the Default Export option:

1. From the menu, select **Upload/Download → Downloads → Download Plan Schedules**.



2. Select **Planning Schedule UI Export** from the **Document Type** drop-down menu to display a **Download Settings** drop-down menu. **Default Export** is automatically selected.
3. Optionally, include **Comments**. Click **Next**.

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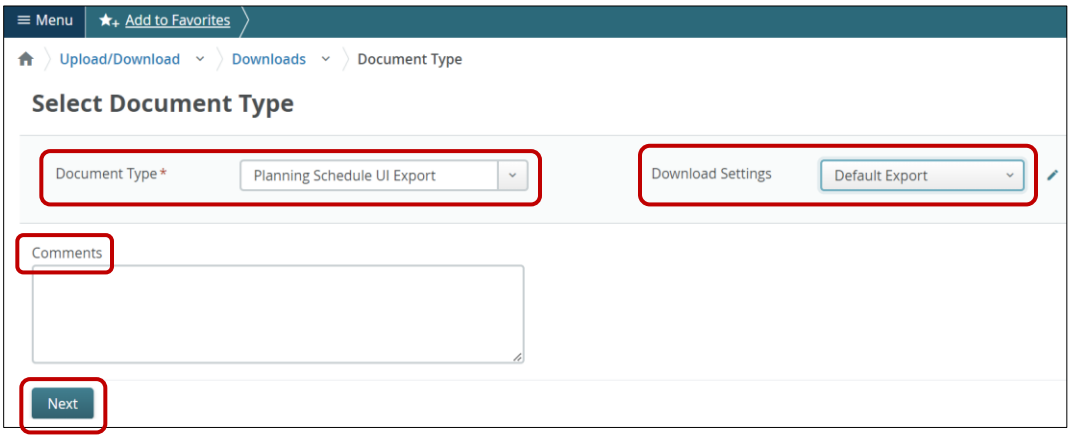
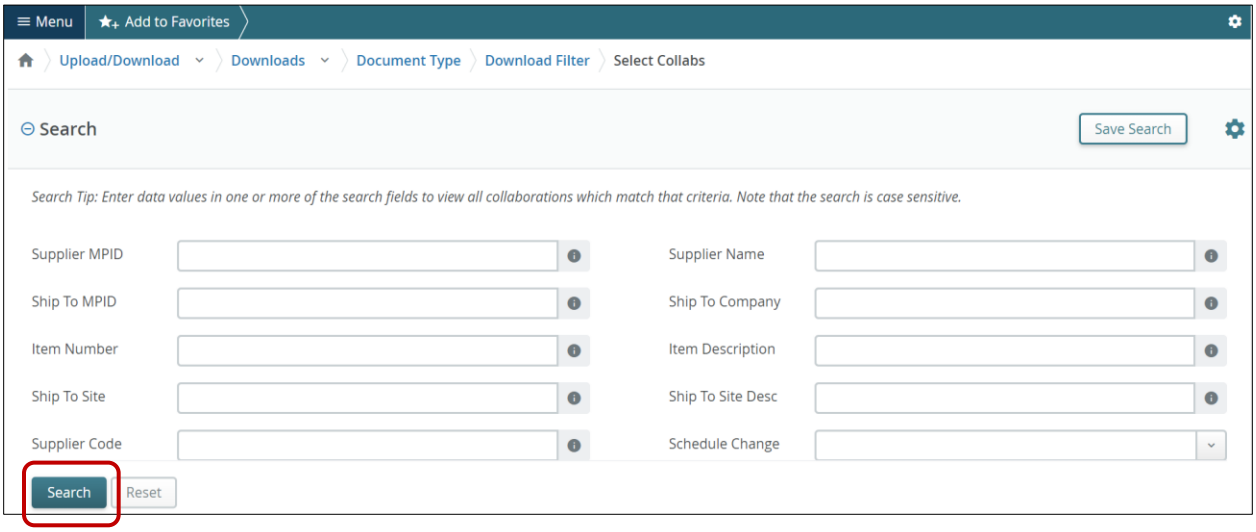
NOTE: For example, if you execute multiple downloads, entering “Item 123”, then “Item 789”, will help you to differentiate your downloads.



4. Input desired search criteria. Click **Search**.



5. The **Job List** page displays the status of your download. Once **Completed**, click the **File Name** to open.

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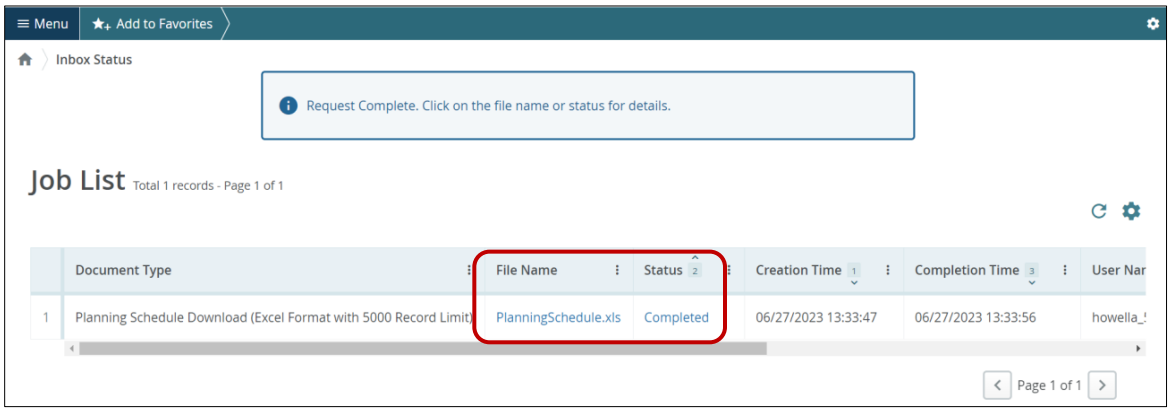
NOTE: If there are errors in the download process, the status displays red. Click the status to view the errors.

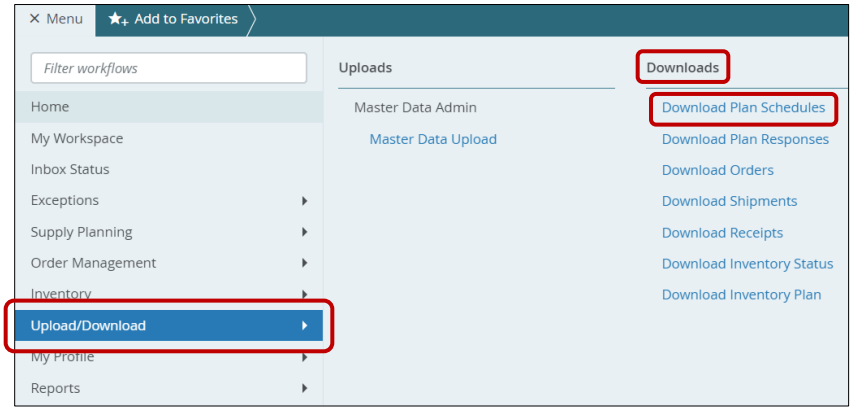


My Favorite Templates

This option allows you to create saved templates to complete your search and download. Because you do not get a preview of what is to be downloaded, we recommend you Save a Planning Schedule Filter prior to executing a download. When you perform the download, apply the saved filter to ensure you download exactly the right information.

To complete a Planning Schedule UI Export:

1. From the menu, select **Upload/Download → Downloads → Download Plan Schedules**.



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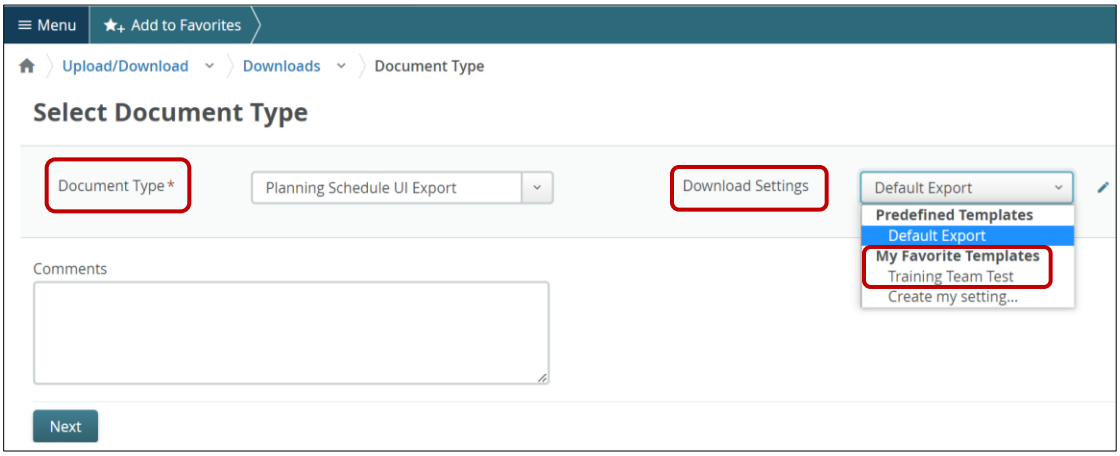
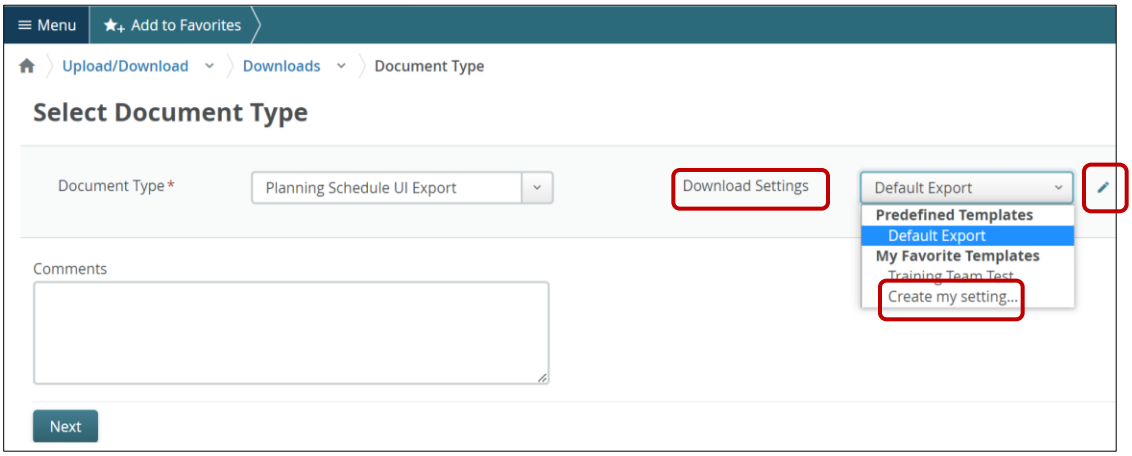
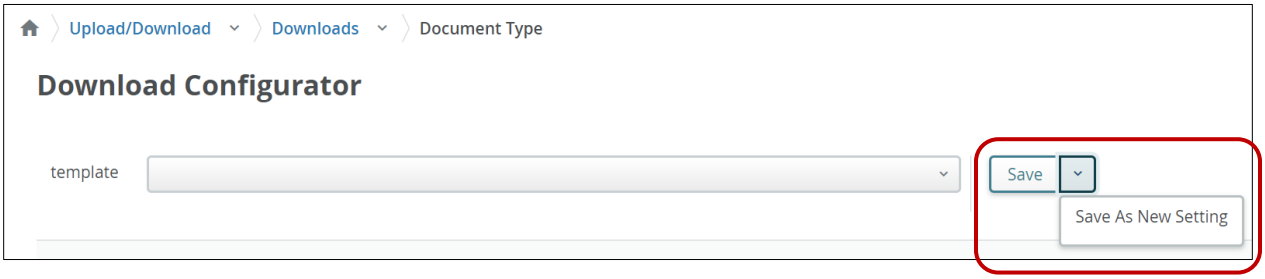
2. Select **Planning Schedule UI Export** from the **Document Type** drop-down menu to display a **Download Settings** drop-down menu. Select from an existing **My Favorite Templates** and skip down to Step 10.



3. To create a new template, select **Create my setting…** from the **Download Settings** drop-down, or select the **Edit** icon to open the **Download Configurator** screen.



4. On the **Download Configurator** screen, click the **Save** button to save changes to an existing template, or select **Save As New Setting** from the **Save** drop-down to create a new template.



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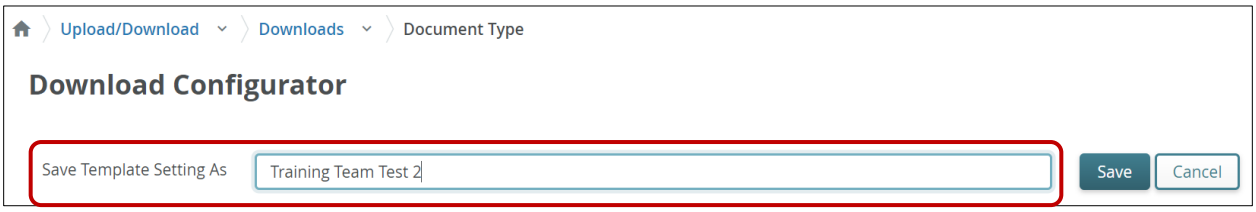
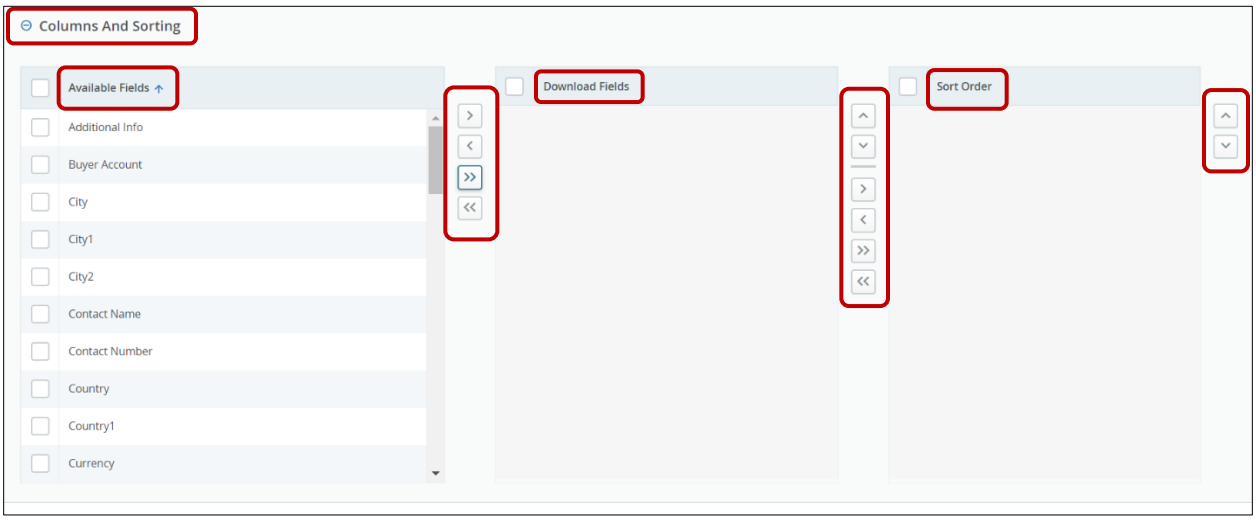
5. Name the new template.

NOTE: You must complete the configurator sections prior to clicking the **Save** button.



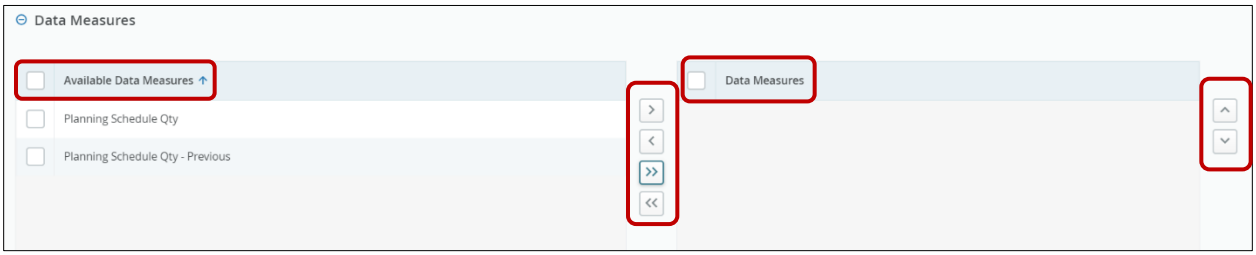
6. In the **Columns and Sorting** section, place checkmarks next to desired **Available Fields** and use the arrow buttons to move them into the **Download Fields** and **Sort Order** sections.

NOTE: The double arrow buttons move ALL fields left or right.



7. Follow the same process for the **Data Measures** section.

NOTE: The double arrow buttons move ALL fields left or right.



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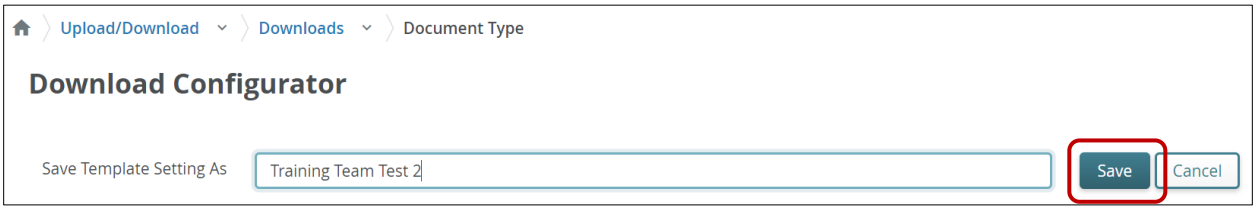
8. Make the desired selections in the **Timeline Settings** section.

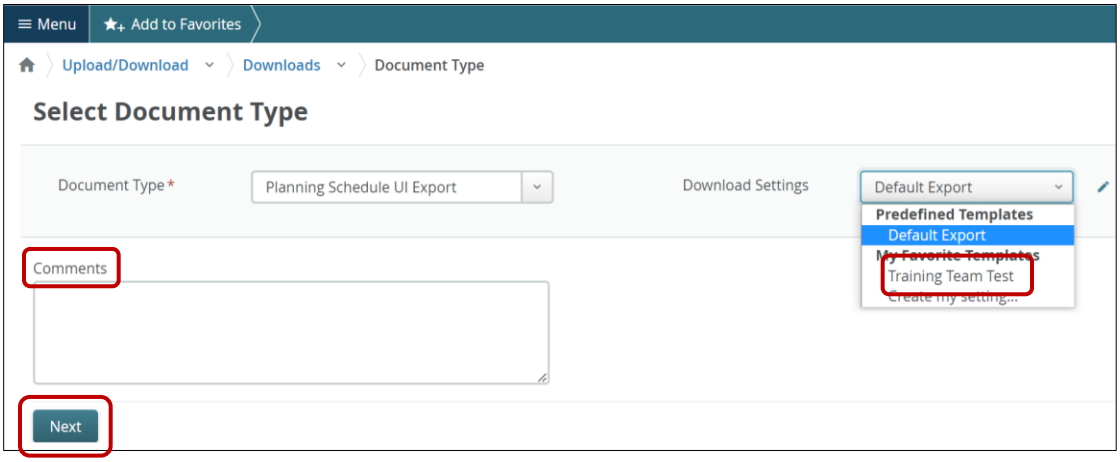
NOTE: If you click **Close**, your selections **ARE NOT** saved.

9. Scroll back to the top. Click **Save**.



10. Select your template from the drop-down menu. Enter optional download **Comments**. Click **Next**.

NOTE: For example, if you execute multiple downloads, entering “Item 123”, then “Item 789”, will help you to differentiate your downloads.



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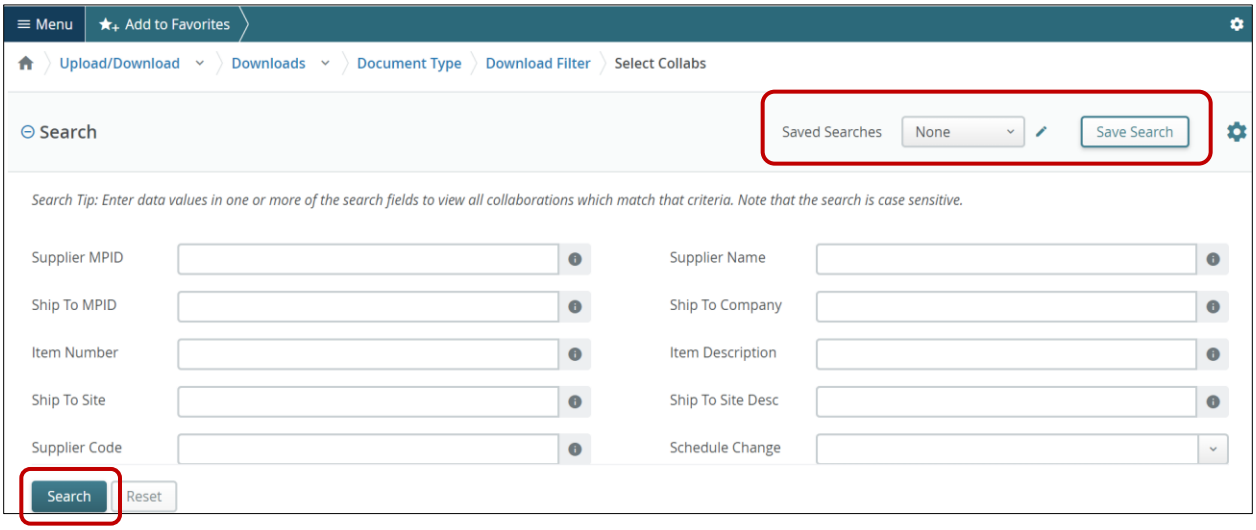
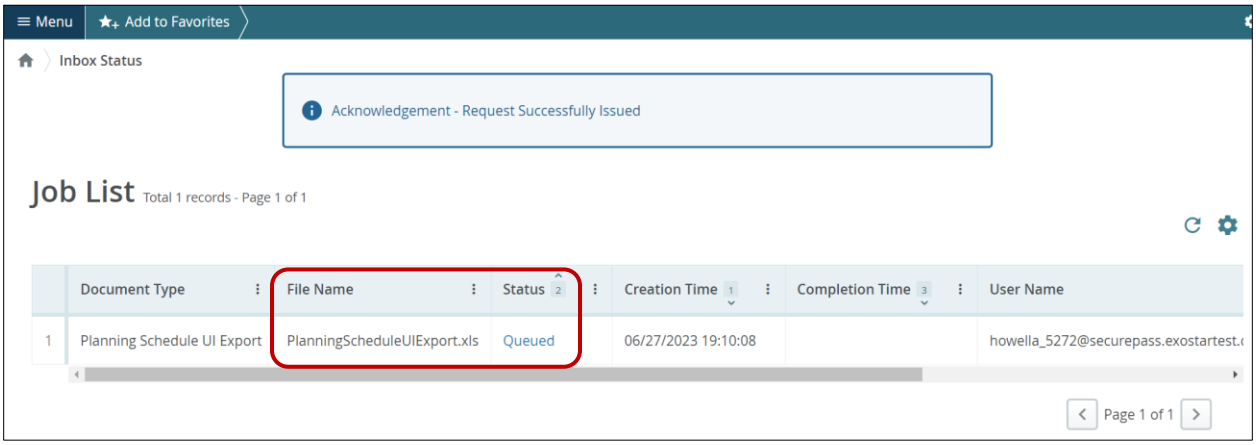
11. Enter desired search criteria or select from the **Saved Searches**. Click **Search**.



12. The **Job List** page displays the status of your download. Once **Completed**, click the **File Name** to open.

NOTE: If there are errors in the download process, the status displays red. Click the status to view the errors.



Download Plan Responses

There are multiple ways for Providing Partners to download Planning Schedule Responses in the 787 SCMP application:

- Planning Schedule Response Download (Excel Format with 5000 record limit)
- Planning Schedule Response Download (Flat File Format)
- Planning Schedule Response UI Export

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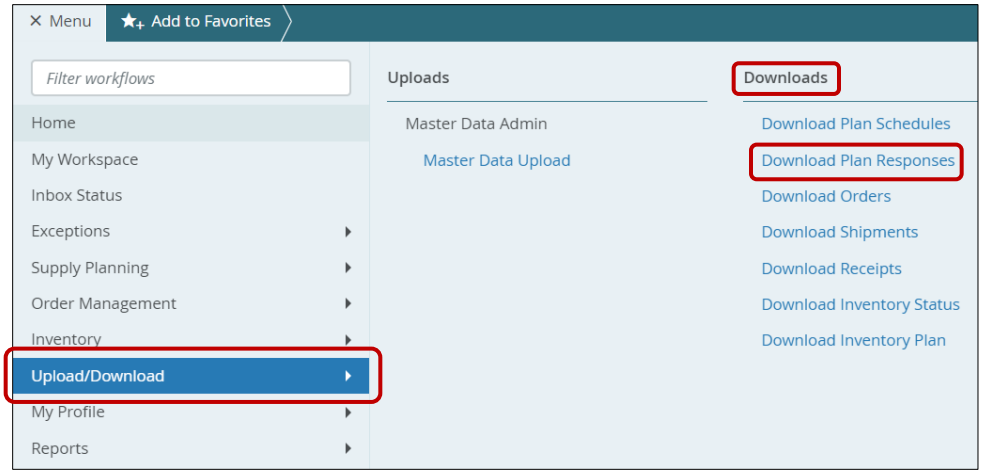
Planning Schedule Response Download (Excel Format with 5000 Record Limit) or Flat File Format

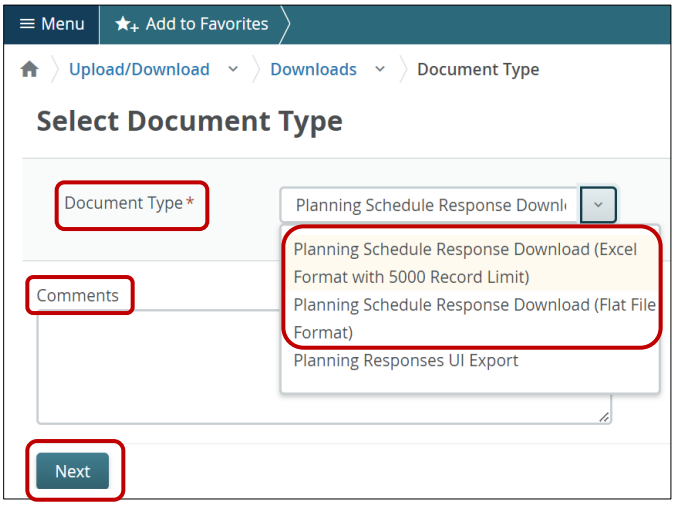
To download a Planning Schedule Response in Excel format with a 5000-record limit OR in a Flat File format:

1. From the menu, select **Upload/Download → Downloads → Download Plan Responses**.



2. Select **Planning Schedule Response Download (Excel Format with 5000 Record Limit)** or **Planning Schedule Response Download (Flat File Format)** from the **Document Type** drop-down menu.
3. Optionally, enter a **Comment** to reference your download. Click the **Next** button.

NOTE: For example, if you execute multiple downloads, entering "Item 123", then "Item 789", will help you to differentiate your downloads.



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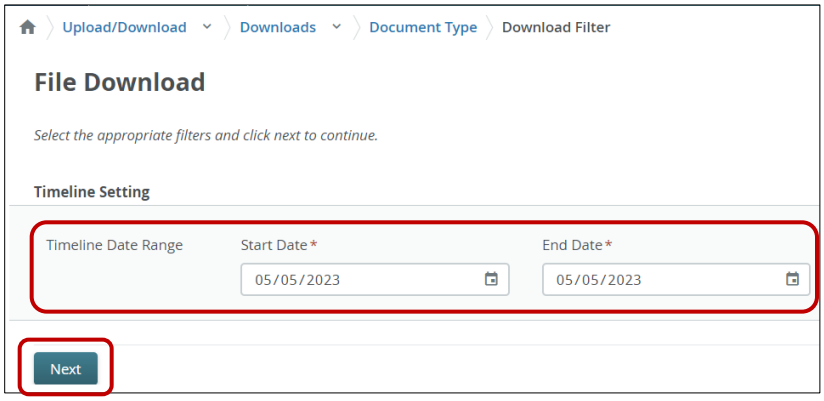
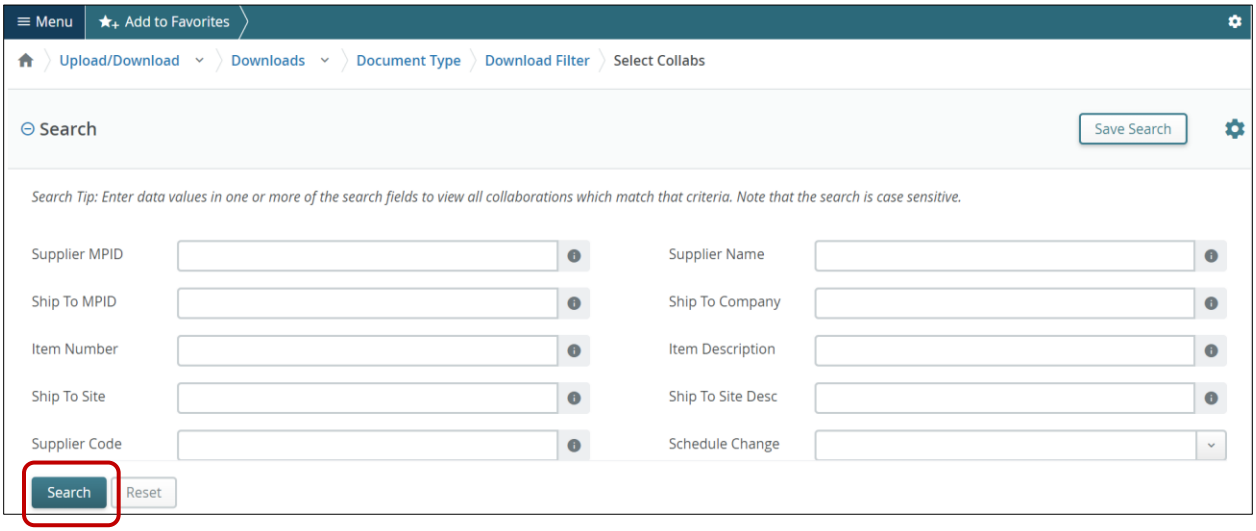
4. Select the **Start Date** and **End Date**. Click **Next**.



5. Input desired search criteria. Click **Search**.



6. The **Job List** page displays the status of your download. Once **Completed**, click the **File Name** to open.

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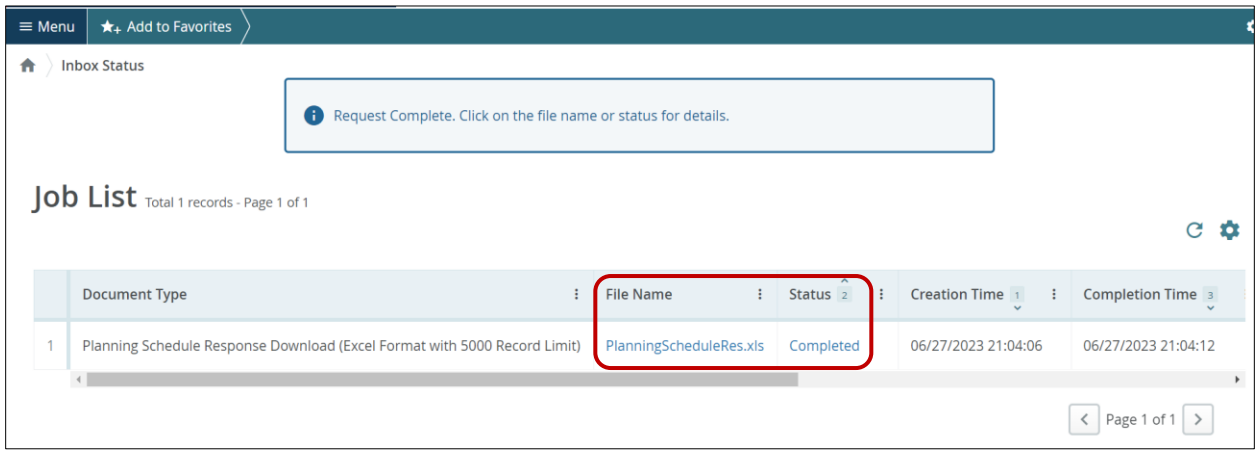
NOTE: If there are errors in the download process, the status displays red. Click the status to view the errors.



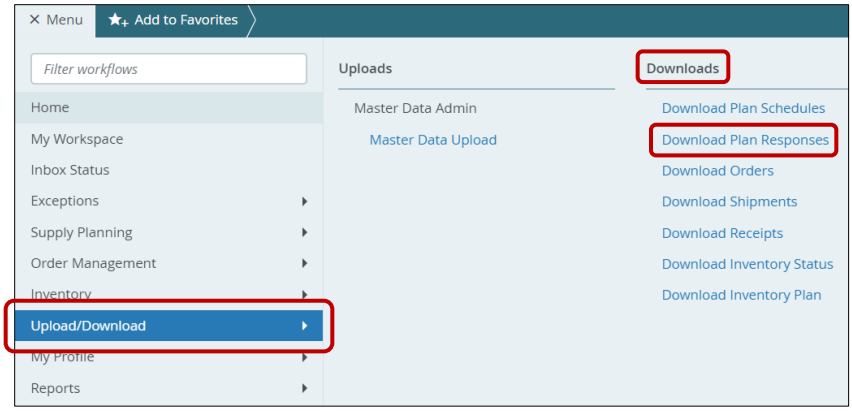
Planning Schedule Response UI Export

The Planning Responses UI Export option allows Providing Partners to pre-define search criteria using a Default Export selection or a My Favorite Templates selection.

Default Export

To complete the Default Export option:

1. From the menu, select **Upload/Download → Downloads → Download Plan Responses**.



2. Select **Planning Responses UI Export** from the **Document Type** drop-down menu to display a **Download Settings** drop-down menu. **Default Export** is automatically selected.
3. Optionally, include **Comments**. Click **Next**.

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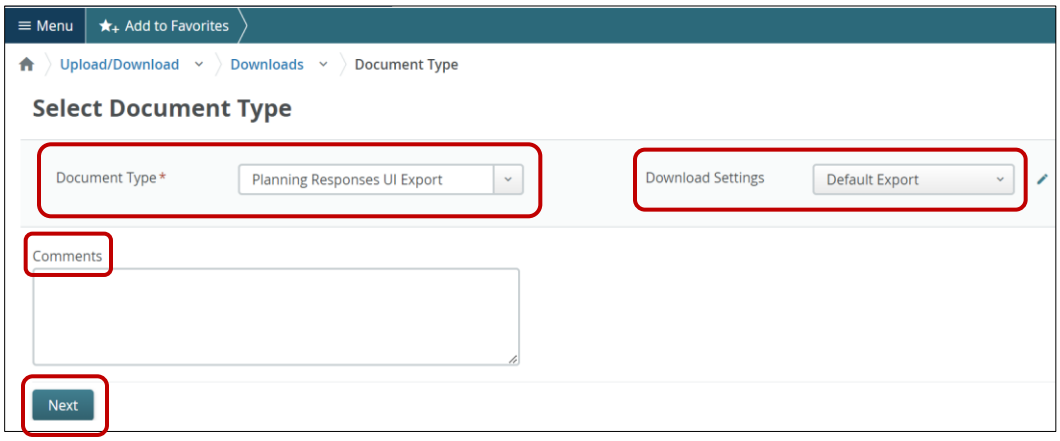
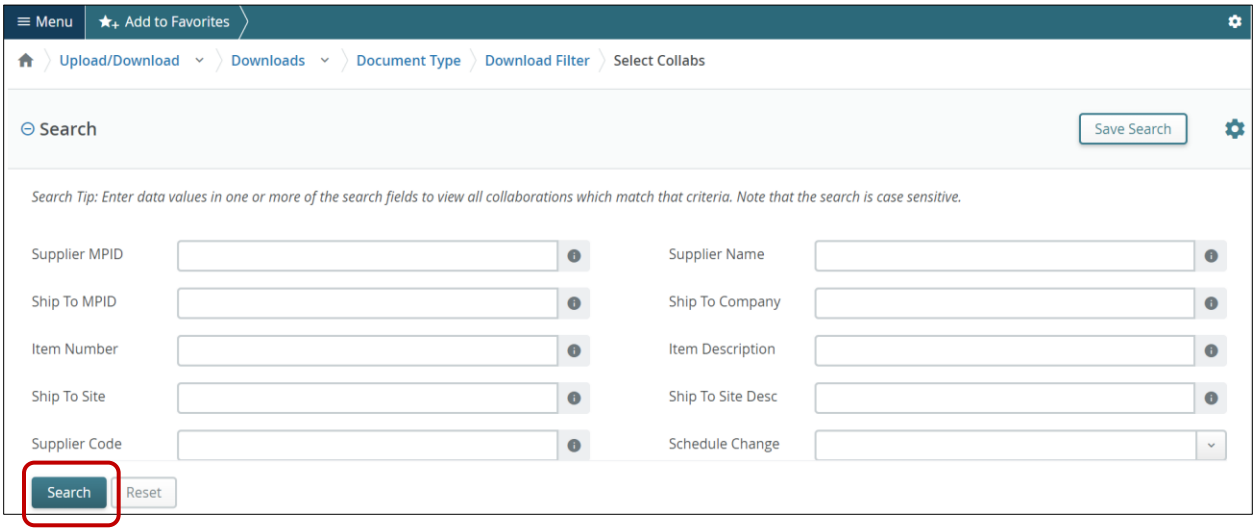
NOTE: For example, if you execute multiple downloads, entering “Item 123”, then “Item 789”, will help you to differentiate your downloads.



4. Input desired search criteria. Click **Search**.



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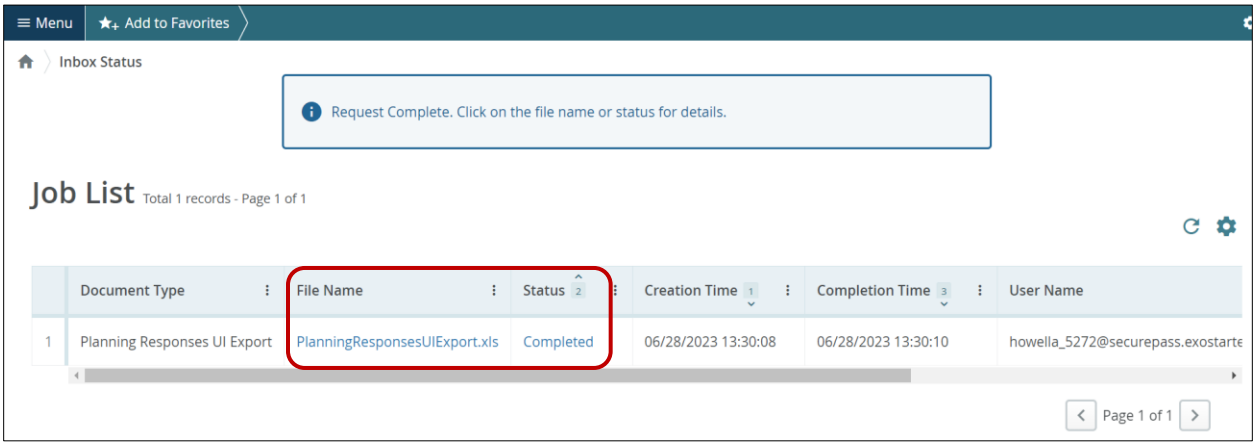
5. The **Job List** page displays the status of your download. Once **Completed**, click the **File Name** to open.

NOTE: If there are errors in the download process, the status displays red. Click the status to view the errors.

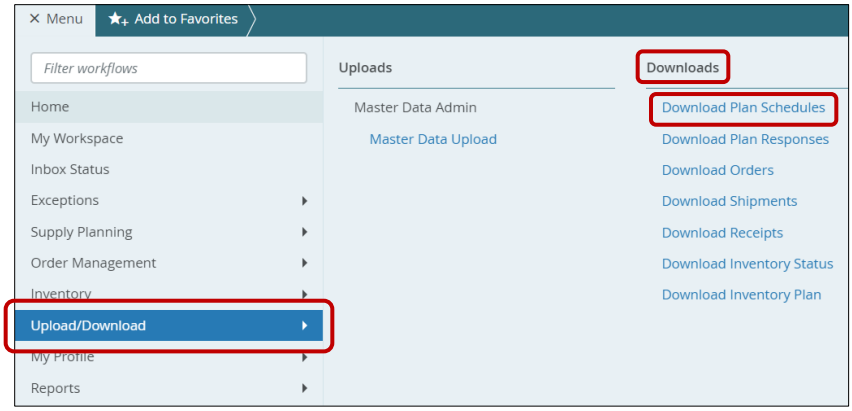


My Favorite Templates

This option allows you to create saved templates to complete your search and download. Because you do not get a preview of what is to be downloaded, we recommend you Save a Planning Schedule Filter prior to executing a download. When you perform the download, apply the saved filter to ensure you download exactly the right information.

To complete a Planning Response UI Export:

1. From the menu, select **Upload/Download → Downloads → Download Plan Schedules**.



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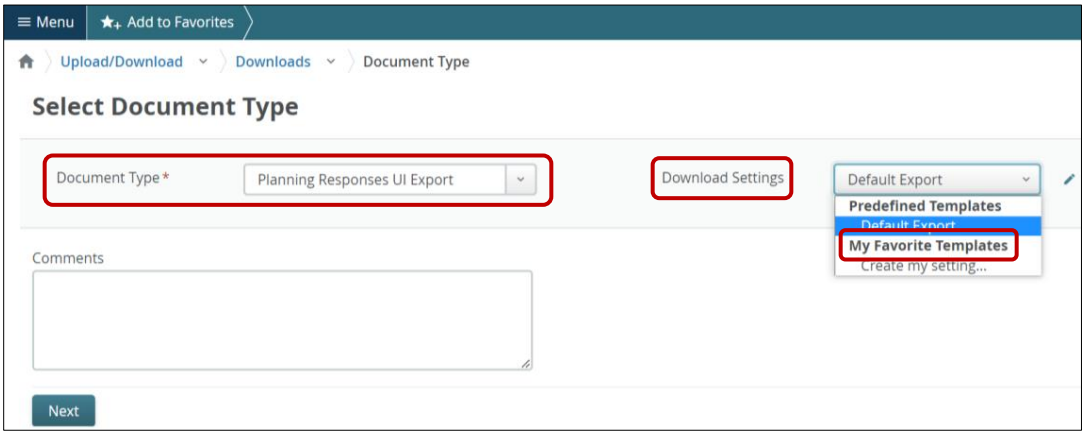
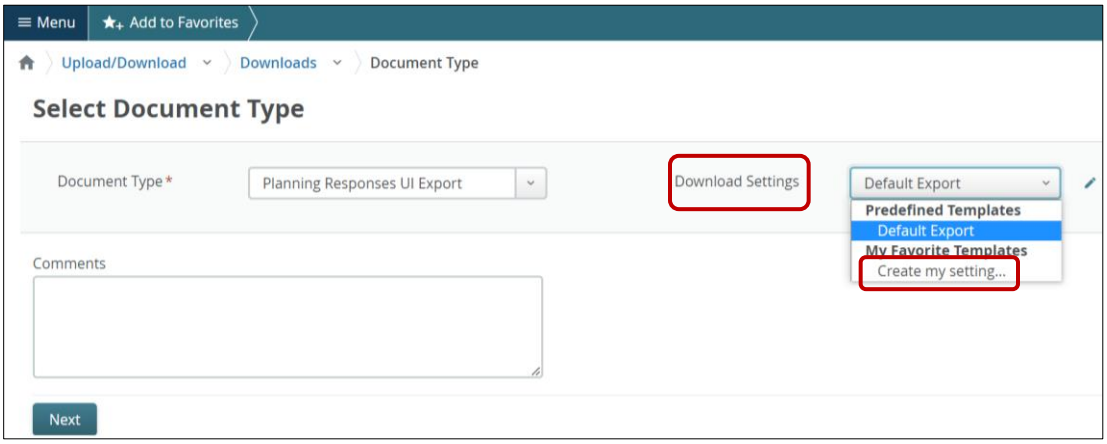
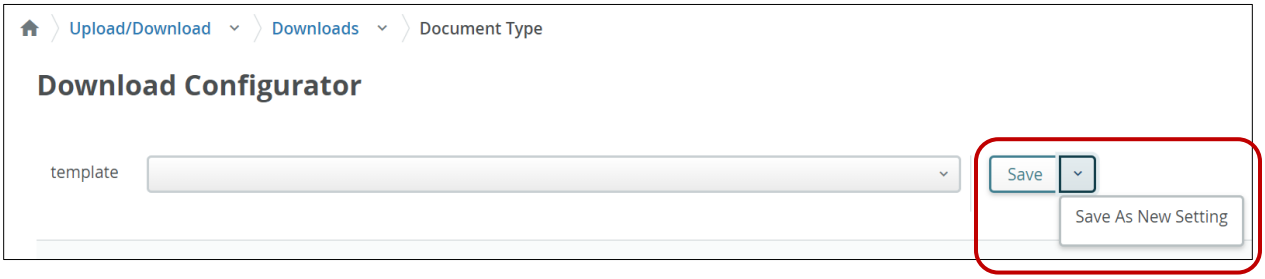
2. Select **Planning Response UI Export** from the **Document Type** drop-down menu to display a **Download Settings** drop-down menu. Select from an existing **My Favorite Templates** and skip down to Step 10.



3. To create a new template, select **Create my setting…** from the **Download Settings** drop-down, or select the **Edit** icon to open the **Download Configurator** screen.



4. On the **Download Configurator** screen, click the **Save** button to save changes to an existing template, or select **Save As New Setting** from the **Save** drop-down to create a new template.



5. Name the new template.

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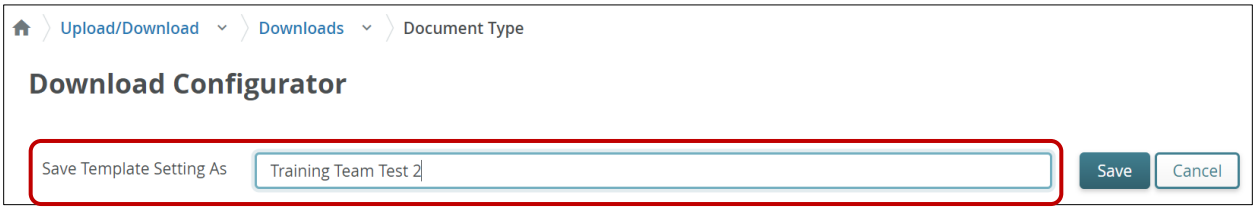
NOTE: You must complete the configurator sections prior to clicking the **Save** button.

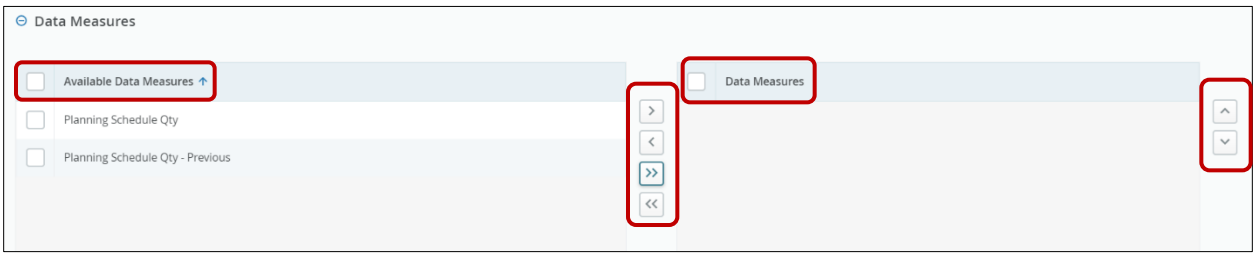


6. In the **Columns and Sorting** section, place checkmarks next to desired **Available Fields** and use the arrow buttons to move them into the **Download Fields** and **Sort Order** sections.

NOTE: The double arrow buttons move ALL fields left or right.

7. Follow the same process for the **Data Measures** section.

NOTE: The double arrow buttons move ALL fields left or right.



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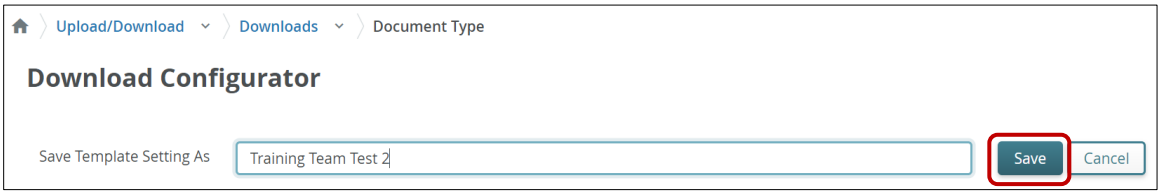
8. Make the desired selections in the **Timeline Settings** section.

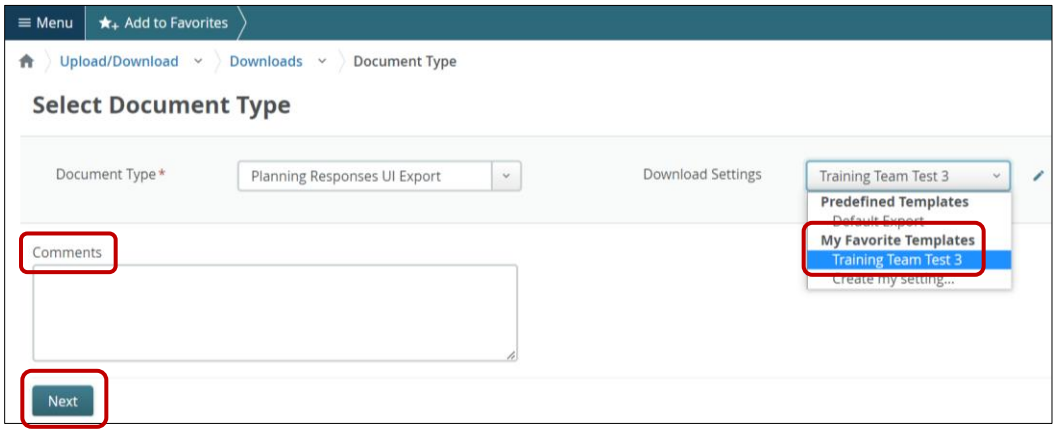
NOTE: If you click **Close**, your selections **ARE NOT** saved.

9. Scroll back to the top. Click **Save**.



10. Select your template from the drop-down menu. Enter optional download **Comments**. Click **Next**.

NOTE: For example, if you execute multiple downloads, entering “Item 123”, then “Item 789”, will help you to differentiate your downloads.



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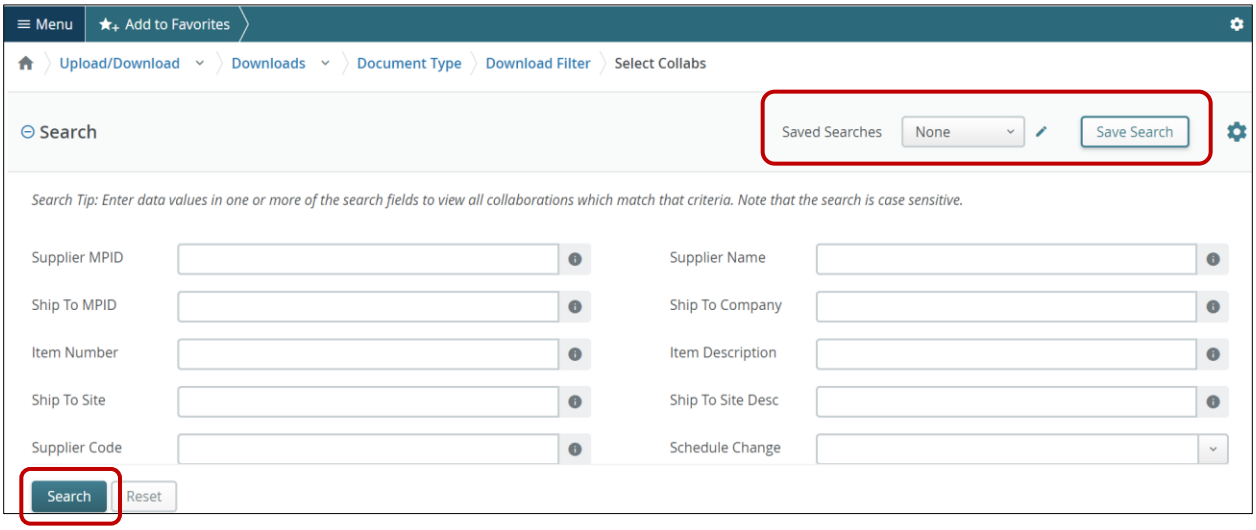
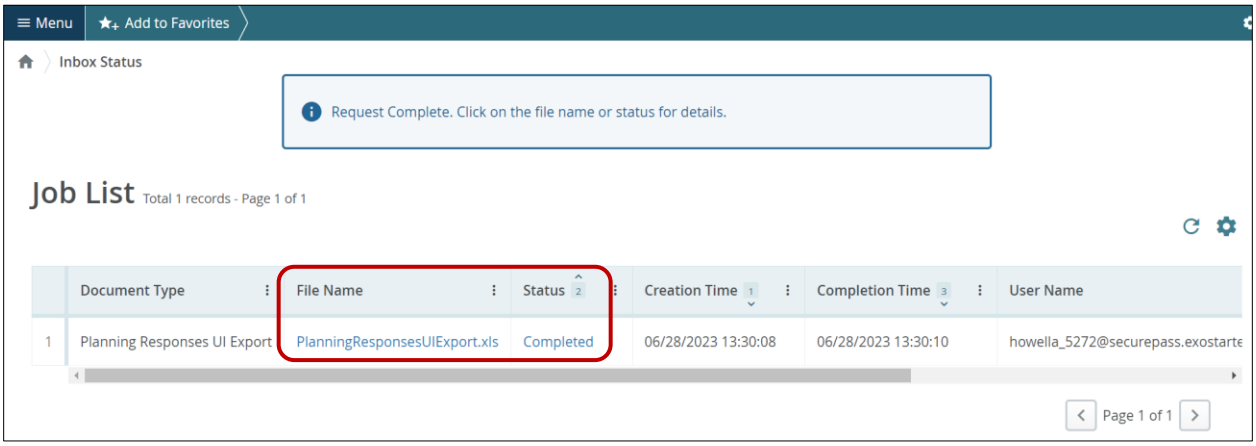
11. Enter desired search criteria or select from the **Saved Searches**. Click **Search**.



12. The **Job List** page displays the status of your download. Once **Completed**, click the **File Name** to open.

NOTE: If there are errors in the download process, the status displays red. Click the status to view the errors.



UPLOAD PLANNING SCHEDULES

When a new Planning Schedule is uploaded by the Consuming Partner, the existing Planning Schedule Qty data is rolled-over to become Planning Schedule Qty – Previous, and the new Planning Schedule data is published as the current Planning Schedule Qty data. If there is any PS Quantity (date & quantity pair) different from the PS Quantity Previous data measure, the Collab is marked with a Schedule Change.

All collabs in Schedule Change State are shown in the Problem Summary region in My Workspace.

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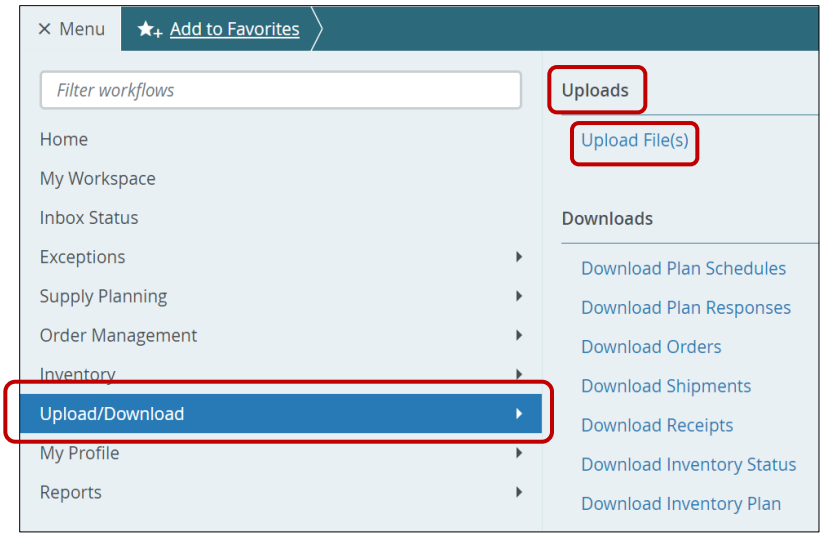
Users can search on this Schedule Change attribute to list only the collabs with a Schedule Change.

Upload Hints:

- Document should be in the format that was downloaded (e.g., use .xls instead of .xlsx).
- To insert new PIT data, copy the entire row and paste it to the end of the existing data.
- Some columns may be hidden during download; all columns must be uploaded to succeed.

To upload a planning schedule or planning schedule response:

1. From the menu, select **Upload/Download → Uploads → Upload File(s)**.



2. Select the appropriate document type, depending on your role as a **Consuming Partner** or **Providing Partner**: **Planning Schedule Upload (Excel Form with 5000 Record Limit)**, **Planning Schedule Upload (Flat File Format)**, or **Inventory Plan Upload**.

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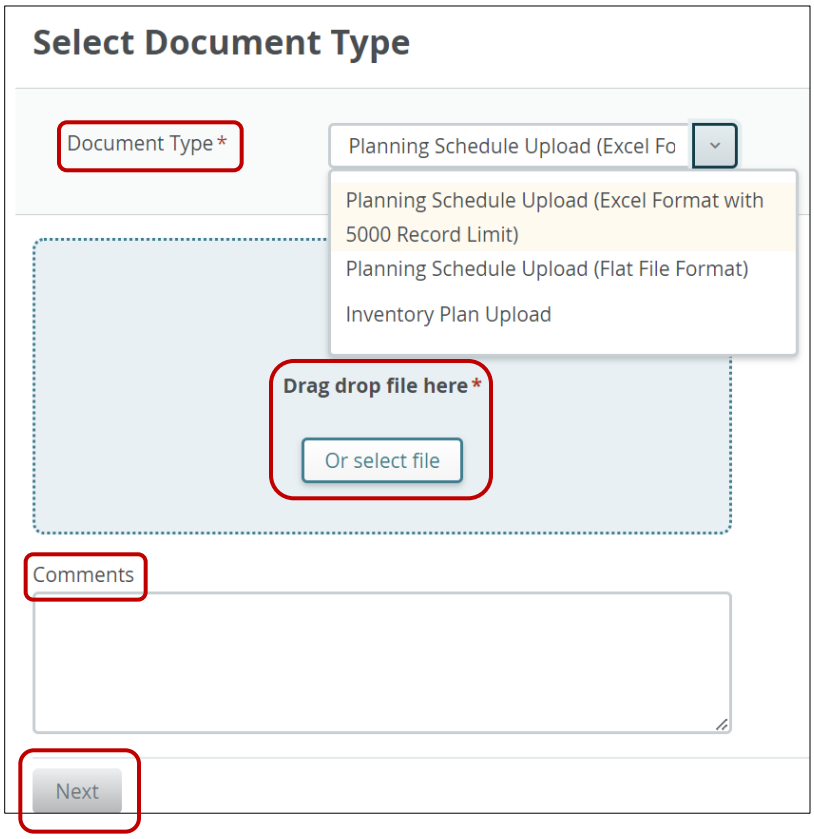
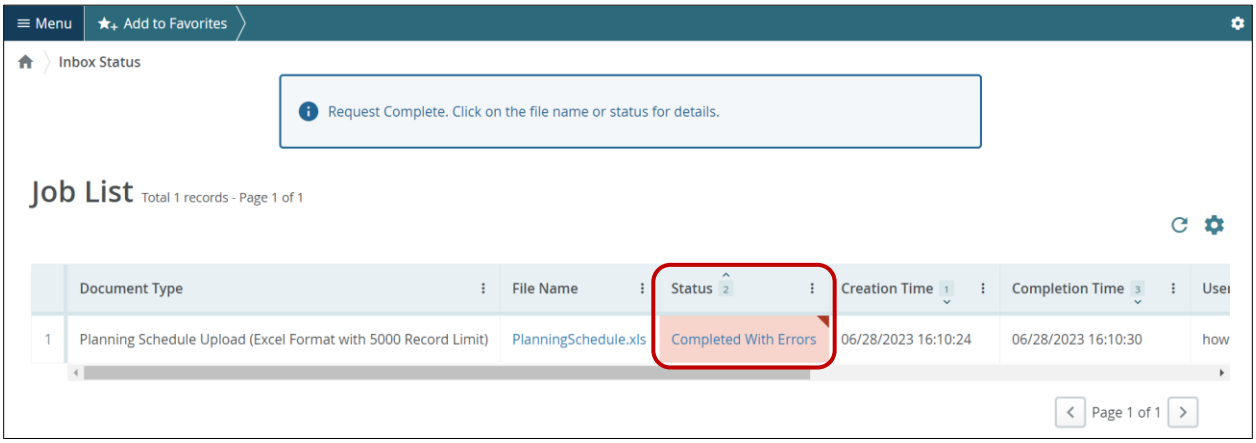
3. Drag and drop your file in the area provided or click the **Or select file** link. Navigate to and select the file you want to upload. Optionally, include upload **Comments**. Click **Next**.



IMPORTANT! The **Inbox Status** page displays the upload status. If the **Job List Status** displays with **Completed with Errors**, click the hyperlinked error to review issues with upload.



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Update Offline with Excel

Edit the Planning Schedule using Microsoft Excel.

- Excel 2003 and prior is limited to 256 columns and 65,535 rows.
- Excel 2007 does not have these limitations.

Only rows in data columns identified by EDIT can be changed.

If you Copy and Paste a row, be sure that Excel does not drop the leading zero of a field, e.g. going from 012345 to 12345.

Update Flat File Offline

We recommend that you use your internal system or word processing software to edit the flat file offline. If you open a flat file (tab-delimited text file) directly with Microsoft Excel, you may find some of the following bad things occur to your downloaded data:

- Leading zeros are dropped, i.e., 001234 becomes 1234.
- Long numbers such as dates in a format = yyyymmddhhmmss (year month day hour min sec), e.g., 20091031012345 (2009 Oct 31, 1:23:45 am), get converted into scientific notation and become 2.0E+13.

Using the Excel Text Import Wizard will resolve the above problems. When done editing the file in Excel, be sure to save it in text format.

Activate/Deactivate

All Collabs are created as active collabs, indicating they were created by a new PMI Blanket Purchase Order. A separate workflow is available to Boeing for marking collabs as active or inactive. A system script will evaluate the collabs with inactive date attribute populated to mark them as inactive.

This script runs daily at a coordinated time with the alert and exception scripts. An email alert is sent to inform users that a Collab is made inactive on that date.

Inactive collabs are not included in PS/PSR downloads or uploads, as well as in search results. Inventory uploads will not fail for the inactive collabs. Exceptions will only be evaluated for active collabs.

To activate or deactivate a planning schedule:

1. From the menu, select **Supply Planning → Activate/Deactivate Items**.

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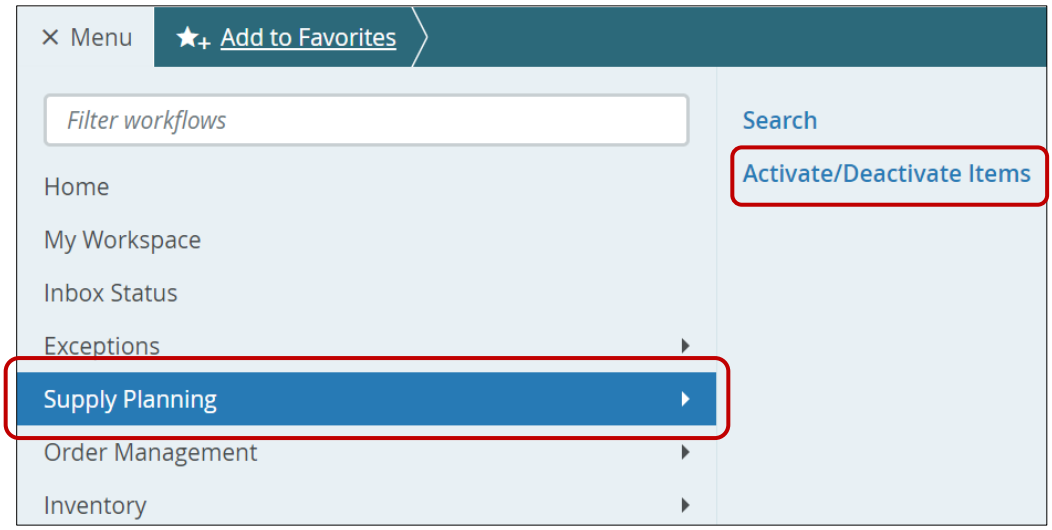
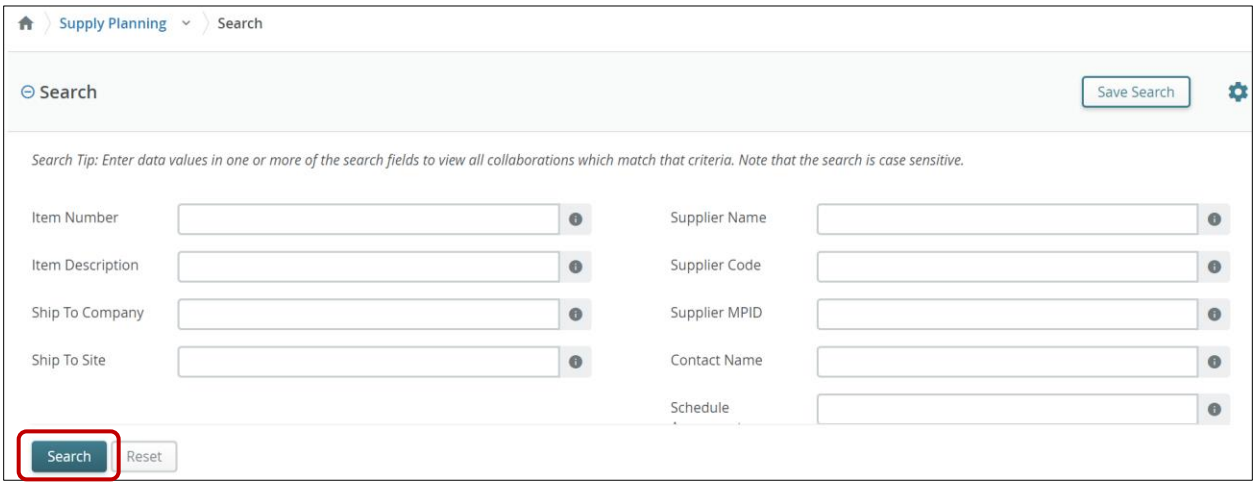


2. Enter your search criteria. Click **Search**.



3. To **Activate** a Collab, delete the date in the **Inactive Date** column. To **Deactivate** a Collab, enter the date in the **Inactive Date** column.

NOTES:

- The Collab will become inactive on the specified date during the nightly run.
- Although SCMP allows past dates to be entered, it is recommended that a future date be used that is coordinated between Boeing and the suppliers.
- The system automatically checks the box to select the line.

4. Click the **Save** button.

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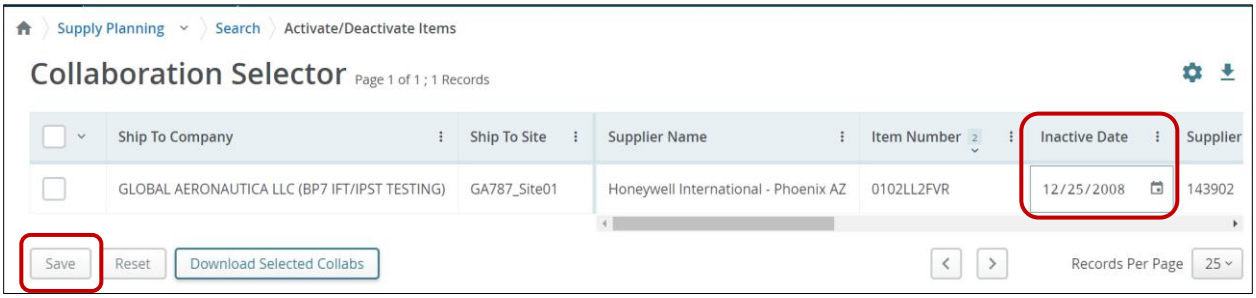
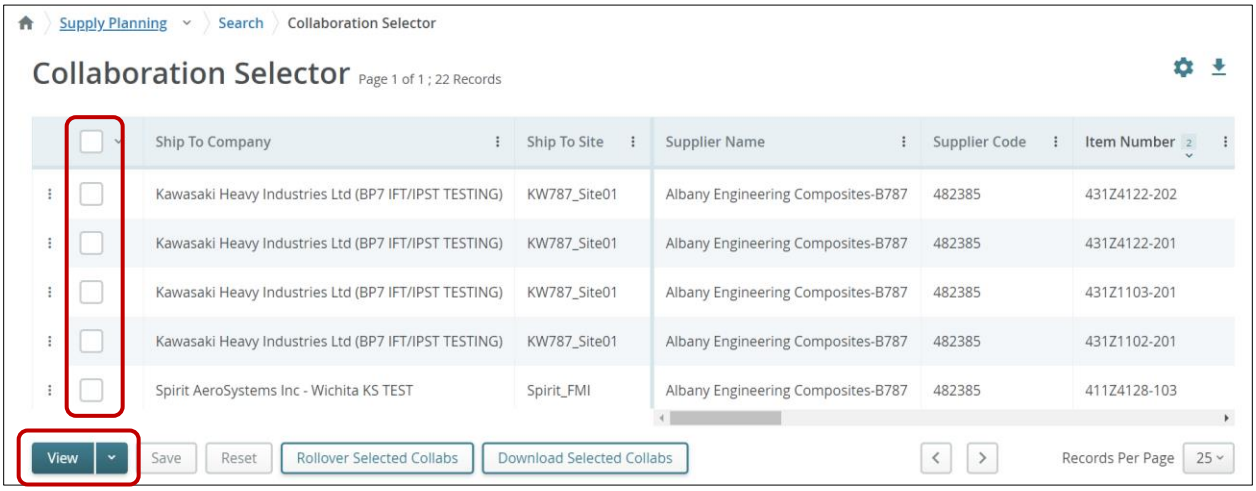
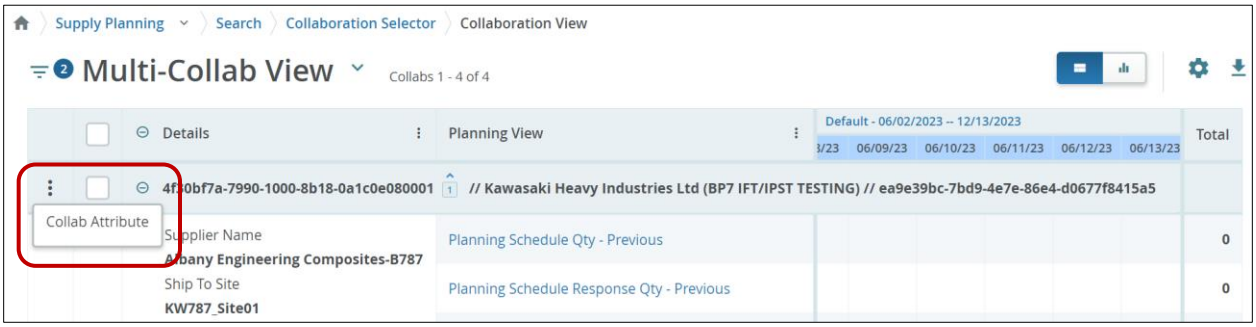


Alternatively, follow the steps below to activate/deactivate:

1. Navigate to an **MCV** page. Place check marks next to the desired line items. Click the **View** button.



2. Click the ellipses drop-down. Select **Collab Attribute**.



3. Scroll down to the **Inactive Date** field.
4. To **Activate** a Collab, delete the date in the **Inactive Date** field. To **Deactivate** a Collab, enter the date in the **Inactive Date** field.

NOTES:

- The Collab will become inactive on the date during the nightly run.

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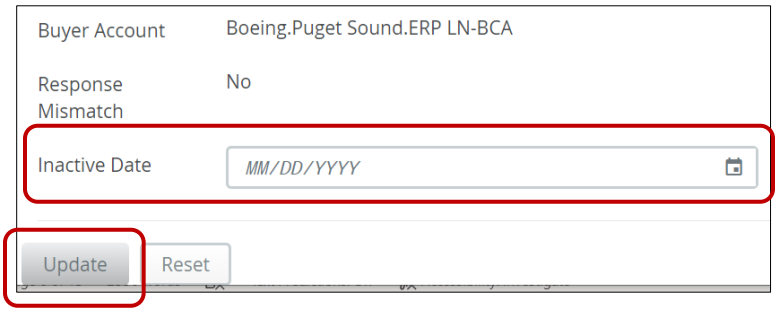
- Although SCMP allows past dates to be entered, it is recommended that a future date be used that is coordinated between Boeing and the suppliers.

5. Click the **Update** button.



RESPONSE

The Providing Partner is expected to respond to every planning schedule requirement up to the Response Limit Date in the future. The Providing Partner provides their response:

- Manually via the SCMP UI via the MCV page.
- If manually entered, the Providing Partner should change the Schedule Status to Sent to let the Consuming Partner know it is complete by uploading an Excel spreadsheet.

If the Providing Partner cannot meet the entire requirement for a specific time bucket, they can spread the response across multiple time buckets. The Providing Partner can add a comment to their response.

Guidelines

Planning Schedule Response Edits	Recommended Process	Steps
A few Points In Time (PITs)	Manually via the SCMP UI MCV page- Time Buckets	1. On the MCV page, enter the Planning Schedule Response Qty values for each specific date. 2. Click the Update button.
A few Points In Time (PITs) Plus include a Response Note	Manually via the SCMP UI MCV page- Data Measure	1. On the MCV page, click the Planning Schedule Response Qty data measure name to pop open the PIT Info window. 2. Enter the Quantity values for each specific date. 3. Enter the Response Note and/or Reason Code for each specific date. 4. Click the Update button.

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A few to All Points In Time (PITs) where new PIT data will match existing data	Manually via the SCMP UI MCV page- Copy PIT Function	1. On the MCV page, select the desired Collabs and click the Copy PITs tab. 2. Set desired Start Date and End Date. 3. Select the appropriate Source and Target Data Measure from the pull-down menu. 4. Click the Copy button. 5. Click the OK button.
Numerous Points In Time (PITs) – Because the Planning Schedule is new or needs to be extensively changed	Download/Edit/Upload Excel spreadsheet	1. Click Download Plan Schedules and follow the normal download process for all the items that you don't already have a Planning Schedule Response and/or items whose Planning Schedule Response needs to be extensively changed. 2. Edit the downloaded file to reflect your new or changed Planning Schedule Response, including a Reason Code if applicable. 3. Click Upload Files and follow the normal upload process.

PUBLISH

The Consuming Partner publishes a Planning Schedule to indicate their requirements to the Providing Partner and Boeing. The Planning Schedule data includes part number, quantity, date needed, and delivery site.

The Consuming Partner enters the Planning Schedule:

- Manually via the SCMP User Interface (UI) in the Multi- Collab View (MCV) page.

If manually created, the Consuming Partner should change the Schedule Status to New to let the Providing Partner know it is ready for a response:

- Uploading an Excel spreadsheet.
- Through B2B transaction

The Planning Schedule has an 18-month planning horizon:

- The user interface defaults to about 28 weeks of daily 'time buckets' or columns.

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- The timeline view can be changed to show the data as weekly or monthly time buckets. The underlying data remains the same.

Guidelines

Planning Schedule Edits	Recommended Process	Steps
A few Points In Time (PITs)	Manually via the SCMP UI MCV page- Time Buckets	1. On the MCV page, enter the Planning Schedule Qty values for each specific date. 2. Click the Update button.
A few Points In Time (PITs) Plus include a Receiver Reference Number and Mfg. Line Number	Manually via the SCMP UI MCV page- Data Measure	1. On the MCV page, click the Planning Schedule Qty data measure name to pop open the PIT Info window. 2. Enter the Quantity values for each specific date. 3. Enter the Receiver Reference Number and Mfg. Line Number for each specific date. 4. Click the Update button.
A few to All Points In Time (PITs) where new PIT data will match existing data	Manually via the SCMP UI MCV page- Copy PIT Function	1. On the MCV page, select the desired Collabs and click the Copy PITs tab. 2. Set desired Start Date and End Date. 3. Select the appropriate Source and Target Data Measure from the pull-down menu. 4. Click the Copy button. 5. Click the OK button.
Numerous Points In Time (PITs) – Planning Schedule is new or needs to be extensively changed	Download/Edit/ Upload Excel spreadsheet	1. Click Download Plan Schedules and follow the normal download process for all the items you don't already have a Planning Schedule and/or items whose Planning Schedule needs to be extensively changed. 2. Edit the downloaded file to reflect your new or changed Planning Schedule, including setting the Receiver Reference Number and Mfg. Line Number if appropriate. 3. Click Upload Files and follow the normal upload process.

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