

View a Planning Schedule/Scheduling Agreement (PLS/SA, PLANNING SCHEDULE/SCHEDULING AGREEMENT)

The Planning schedule/Scheduling Agreement (PLS) is used as a way for Bell to place master purchase orders (blanket purchase orders). These are firm orders, and therefore, should not be mistaken as a forecast. You may notice more than one document with the same Scheduling Agreement #; make sure to use the most recently sent document as updates may occur.

To view a Planning Schedule/Scheduling Agreement, select the document type 'PLS' from the document list page, click on the document number of the schedule you wish to view.

The screenshot shows the ESIS Harmony Order Management interface. At the top, there are navigation links: HOM Preferences, Document List, Help, and Exit HOM. Below this is a menu bar with options: View, Report, Delete, Ack (as is), Ack (w/chg), CreateINV, Send, and Excel Report. A pop-up window titled "YOUR DOCUMENT LIST PREFERENCES ARE:" is displayed, showing the following settings:

- Order By: docdate DESC, type
- Partners: ALL Partners
- Document Types: ALL Document types
- Date Limit: 30 Days
- Statuses: ALL Document Statuses

Below the preferences are buttons for "Select All" and "De - Select All". A message states "Document list shows 139 of 216 total documents". A table of documents is shown below:

	Partner	DocNo	Type	DocDate	Status	StatDate
_ 1	<input type="checkbox"/> BELL HELICOPTER (BHTI)	4500086498	PO	01/01/2009	RCV	10/17/2007
_ 2	<input type="checkbox"/> BELL HELICOPTER (BHTI)	4500086499	PO	01/01/2009	RCV	10/17/2007
_ 3	<input type="checkbox"/> BELL HELICOPTER (BHCM)	5500011989	PLS	11/01/2007	RCV	11/01/2007
_ 4	<input type="checkbox"/> BELL HELICOPTER (BHCM)	4900000545	PO	11/01/2007	RCV	11/01/2007
_ 5	<input type="checkbox"/> BELL HELICOPTER (BHTI)	4500086525 -	CO	10/31/2007	RCV	11/01/2007
_ 6	<input type="checkbox"/> BELL HELICOPTER (BHTI)	4500086525 -	CO	10/31/2007	RCV	11/01/2007

When the planning schedule/scheduling agreement comes up, you will notice the following fields:

- Scheduling Agreement #: the order number to be referenced on the invoice
- Forecast Date: the date the order was issued
- Horiz. Start Date: delivery date of the first fraction of the order
- Horiz. End Date: delivery date of the last fraction of the order
- Quantity Type: numeric value of cumulative quantity.
- SRM GOA: SRM GOA number
- Ship To: contains building no. used for delivery of materials
- Header Notes: supplier & buyer name

Scheduling Agreement #	5500011989
Forecast Date	//
Horiz. Start Date	//
Horiz. End Date	//
Quantity Type	Cumulative
SRM GOA	6000000888

Ship To 3981
[Header Notes](#)

Below the Line # and Buyer Part # you will notice the following fields:

- a. Type: describes the confidence level in the orders quantities and delivery date.
- b. Timing: specifies intervals of the scheduled delivery dates (i.e. Daily, Weekly, Monthly...)
- c. Qty: specifies quantity of materials required for each interval
- d. Delivery Date: specifies the requested delivery date of the materials.
- e. Line Notes: contains the ODS-MEPI and the Item price

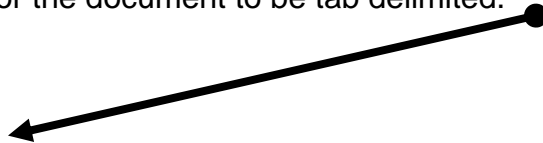
Line #	Buyer Part #		
1	407-010-104-113A		
Type	Timing	Qty	Delivery Date
Mutually Defined	Mutually Defined	2	08/19/08
Mutually Defined	Mutually Defined	3	05/19/10
Mutually Defined	Mutually Defined	2	05/28/10
Mutually Defined	Mutually Defined	1	06/03/10
Line 1 Notes			

There are two different ways to create a report of a Planning Schedule/Scheduling Agreement; either by using the 'Report' or the 'Excel Report' command, both located in upper left on the HOM toolbar.

The 'Report' function will make it possible to choose the application with which you want to open the report. For example, you can use MS Word or any database application.

To use the 'Report' function to view or print the document, you must select "download reports to your hard drive" within the HOM Preferences/Report Preferences in HOM. Also, your browser may block the download initially, you must click on the "blocked download" message, click "allow download" and re-select the document and re-click 'report' at the top-left of the HOM screen.

The 'Excel Report' function is used to open the Planning Schedule/Scheduling Agreement with Excel only. This also allows you to hide/delete any fields that are blank so that you only work with the information that you need. Please note that certain fields may display dashes. This allows for the document to be tab delimited.



Report | Delete | Excel Report

Planning Schedule from BELL HELICOPTER (BHCM)

Scheduling Agreement #	5500011989
Forecast Date	//
Horiz. Start Date	//
Horiz. End Date	//
Quantity Type	Cumulative
SRM GOA	6000000888

Ship To | 3981

[Header Notes](#)

Line #	Buyer Part #
1	407-010-104-113A

Type	Timing	Qty	Delivery Date
Mutually Defined	Mutually Defined	2	08/19/08
Mutually Defined	Mutually Defined	2	08/26/08
Mutually Defined	Mutually Defined	2	09/03/08
Mutually Defined	Mutually Defined	2	09/10/08