830 Planning Schedule

X12/V4010/830: Planning Schedule

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830 Planning Schedule with Release Capability

Functional Group=PS

Purpose: This Draft Standard for Trial Use contains the format and establishes the data contents of the Planning Schedule with Release Capability Transaction Set (830) for use within the context of an Electronic Data Interchange (EDI) environment. The transaction set can be used to provide for customary and established business practice relative to the transfer of forecasting/material release information between organizations.The planning schedule transaction may be used in various ways or in a combination of ways, such as: (1) a simple forecast; (2) a forecast with the buyer's authorization for the seller to commit to resources, such as labor or material; (3) a forecast that is also used as an order release mechanism, containing such elements as resource authorizations, period-to-date cumulative quantities, and specific ship/delivery patterns for requirements that have been represented in "buckets," such as weekly, monthly, or quarterly. The order release forecast may also contain all data related to purchase orders, as required, because the order release capability eliminates the need for discrete generation of purchase orders.

Heading:

Pos	Id	Segment Name	Req	Max Use	Repeat	Notes	Usage
010	ST	Transaction Set Header	M	1			Must use
020	BFR	Beginning Segment for Planning Schedule	M	1			Must use
LOOP ID - N1					**200**		
230	N1	Name	O	1			Used

Detail:

Pos	Id	Segment Name	Req	Max Use	Repeat	Notes	Usage
LOOP ID - LIN					**>1**		
010	LIN	Item Identification	M	1			Must use
020	UIT	Unit Detail	O	1			Used
LOOP ID - FST					**>1**	**N2/410L**	
410	FST	Forecast Schedule	O	1		N2/410	Used

Summary:

Pos	Id	Segment Name	Req	Max Use	Repeat	Notes	Usage
010	CTT	Transaction Totals	M	1		N3/010	Used
020	SE	Transaction Set Trailer	M	1			Must use

ST   **Transaction Set Header**

Pos: 010   Max: 1
Heading - Mandatory
Loop: N/A   Elements: 2

User Option (Usage): Must use

Purpose: To indicate the start of a transaction set and to assign a control number

Element Summary:

Ref	Id	Element Name	Req	Type	Min/Max	Usage
ST01	143	**Transaction Set Identifier Code**	M	ID	3/3	Must use

Description: Code uniquely identifying a Transaction Set

CodeList Summary (Total Codes: 298, Included: 1)

Code	Name
830	Planning Schedule with Release Capability

Ref	Id	Element Name	Req	Type	Min/Max	Usage
ST02	329	**Transaction Set Control Number**	M	AN	4/9	Must use

Description: Identifying control number that must be unique within the transaction set functional group assigned by the originator for a transaction set

BFR   Beginning Segment for Planning Schedule

Pos: 020	Max: 1
Heading - Mandatory	
Loop: N/A	Elements: 7

User Option (Usage): Must use

Purpose: To indicate the beginning of a planning schedule transaction set; whether a ship or delivery based forecast; and related forecast envelope dates

Element Summary:

Ref	Id	Element Name	Req	Type	Min/Max	Usage
BFR01	353	**Transaction Set Purpose Code**	M	ID	2/2	Must use

Description: Code identifying purpose of transaction set

CodeList Summary (Total Codes: 65, Included: 1)

Code	Name
05	Replace

Ref	Id	Element Name	Req	Type	Min/Max	Usage
BFR02	127	**Reference Identification**	X	AN	1/30	Used

Description: Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier

This number must be unique within a contractual agreement, i.e., a model year

Ref	Id	Element Name	Req	Type	Min/Max	Usage
BFR04	675	**Schedule Type Qualifier**	M	ID	2/2	Must use

Description: Code identifying the type of dates used when defining a shipping or delivery time in a schedule or forecast

CodeList Summary (Total Codes: 11, Included: 1)

Code	Name
DL	Delivery Based

Ref	Id	Element Name	Req	Type	Min/Max	Usage
BFR05	676	**Schedule Quantity Qualifier**	M	ID	1/1	Must use

Description: Code identifying the type of quantities used when defining a schedule or forecast

CodeList Summary (Total Codes: 4, Included: 1)

Code	Name
A	Actual Discrete Quantities

Ref	Id	Element Name	Req	Type	Min/Max	Usage
BFR06	373	**Date**	M	DT	8/8	Must use

Description: Date expressed as CCYYMMDD

Start Date to which this Planning Schedule applies.

Ref	Id	Element Name	Req	Type	Min/Max	Usage
BFR07	373	**Date**	M	DT	8/8	Must use

Description: Date expressed as CCYYMMDD

End Date to which this Planning Schedule applies.

Ref	Id	Element Name	Req	Type	Min/Max	Usage
BFR08	373	**Date**	M	DT	8/8	Must use

Description: Date expressed as CCYYMMDD

Creation Date of this Planning Schedule

Loop Name

Pos: 230	Repeat: 200
Optional	
Loop: N1	Elements: N/A

User Option (Usage): Used

Purpose: To identify a party by type of organization, name, and code

Loop Summary:

Pos	Id	Segment Name	Req	Max Use	Repeat	Usage
230	N1	Name	O	1		Used

N1 Name

Pos: 230	Max: 1
Heading - Optional	
Loop: N1	**Elements: 3**

User Option (Usage): Used

Purpose: To identify a party by type of organization, name, and code

Element Summary:

Ref	Id	Element Name	Req	Type	Min/Max	Usage
N101	98	**Entity Identifier Code**	M	ID	2/3	Must use

Description: Code identifying an organizational entity, a physical location, property or an individual

CodeList Summary (Total Codes: 1312, Included: 2)

Code	Name
ST	Ship To
SU	Supplier/Manufacturer

Ref	Id	Element Name	Req	Type	Min/Max	Usage
N103	66	**Identification Code Qualifier**	X	ID	1/2	Used

Description: Code designating the system/method of code structure used for Identification Code (67)

CodeList Summary (Total Codes: 215, Included: 1)

Code	Name
92	Assigned by Buyer or Buyer's Agent

Ref	Id	Element Name	Req	Type	Min/Max	Usage
N104	67	**Identification Code**	X	AN	2/80	Used

Description: Code identifying a party or other code

Suppress internal dashes and spaces
Since the minimum length of this element is 2 characters, if the warehouse code is 1 digit, the warehouse code will be preceeded with a zero

Loop Item Identification

Pos: 010	**Repeat: >1**
Mandatory	
Loop: LIN	**Elements: N/A**

User Option (Usage): Must use

Purpose: To specify basic item identification data

Loop Summary:

Pos	Id	Segment Name	Req	Max Use	Repeat	Usage
010	LIN	Item Identification	M	1		Must use
020	UIT	Unit Detail	O	1		Used
410		Loop FST	O		>1	Used

LIN Item Identification

Pos: 010	**Max: 1**
Detail - Mandatory	
Loop: LIN	**Elements: 5**

User Option (Usage): Must use

Purpose: To specify basic item identification data

Element Summary:

Ref	Id	Element Name	Req	Type	Min/Max	Usage
LIN01	350	**Assigned Identification**	M	AN	1/20	Used

Description: Alphanumeric characters assigned for differentiation within a transaction set

Ref	Id	Element Name	Req	Type	Min/Max	Usage
LIN02	235	**Product/Service ID Qualifier**	M	ID	2/2	Must use

Description: Code identifying the type/source of the descriptive number used in Product/Service ID (234)

CodeList Summary (Total Codes: 477, Included: 1)

Code	Name
BP	Buyer's Part Number

Ref	Id	Element Name	Req	Type	Min/Max	Usage
LIN03	234	**Product/Service ID**	M	AN	1/48	Must use

Description: Identifying number for a product or service

Ref	Id	Element Name	Req	Type	Min/Max	Usage
LIN04	235	**Product/Service ID Qualifier**	X	ID	2/2	Used

Description: Code identifying the type/source of the descriptive number used in Product/Service ID (234)

CodeList Summary (Total Codes: 477, Included: 1)

Code	Name
PO	Purchase Order Number

Ref	Id	Element Name	Req	Type	Min/Max	Usage
LIN05	234	**Product/Service ID**	X	AN	1/48	Used

Description: Identifying number for a product or service

If there is a PO number in this element, it will be the blanket PO number for this item.

UIT Unit Detail

<table>
<tr><td>Pos: 020</td><td>Max: 1</td></tr>
<tr><td colspan="2">Detail - Optional</td></tr>
<tr><td>Loop: LIN</td><td>Elements: 1</td></tr>
</table>

User Option (Usage): Used
Purpose: To specify item unit data

Element Summary:

Ref	Id	Element Name	Req	Type	Min/Max	Usage
UIT01	C001	**Composite Unit of Measure**	M	Comp		Must use

Description: To identify a composite unit of measure(See Figures Appendix for examples of use)

Ref	Id	Element Name	Req	Type	Min/Max	Usage
UIT01-01	355	**Unit or Basis for Measurement Code**	M	ID	2/2	Must use

Description: Code specifying the units in which a value is being expressed, or manner in which a measurement has been taken
All valid standard codes are used. (Total Codes: 794)

Loop Forecast Schedule

Pos: 410	**Repeat: >1**
Optional	
Loop: FST	**Elements: N/A**

User Option (Usage): Used

Purpose: To specify the forecasted dates and quantities

Loop Summary:

Pos	Id	Segment Name	Req	Max Use	Repeat	Usage
410	FST	Forecast Schedule	O	1		Used

FST Forecast Schedule

Pos: 410	**Max: 1**
Detail - Optional	
Loop: FST	**Elements: 4**

User Option (Usage): Used

Purpose: To specify the forecasted dates and quantities

Element Summary:

Ref	Id	Element Name	Req	Type	Min/Max	Usage
FST01	380	**Quantity**	M	R	1/15	Must use

Description: Numeric value of quantity

Quantity of part being ordered

Ref	Id	Element Name	Req	Type	Min/Max	Usage
FST02	680	**Forecast Qualifier**	M	ID	1/1	Must use

Description: Code specifying the sender's confidence level of the forecast data or an action associated with a forecast

CodeList Summary (Total Codes: 21, Included: 2)

Code	Name
C	Firm
D	Planning

Ref	Id	Element Name	Req	Type	Min/Max	Usage
FST03	681	**Forecast Timing Qualifier**	M	ID	1/1	Must use

Description: Code specifying interval grouping of the forecast

CodeList Summary (Total Codes: 11, Included: 1)

Code	Name
W	Weekly Bucket (Monday through Sunday)

Ref	Id	Element Name	Req	Type	Min/Max	Usage
FST04	373	**Date**	M	DT	8/8	Must use

Description: Date expressed as CCYYMMDD

Either a discrete date, or the first date of a forecasted bucket as qualified by FST03.

CTT **Transaction Totals**

Pos: 010	Max: 1
Summary - Mandatory	
Loop: N/A	**Elements: 1**

User Option (Usage): Used

Purpose: To transmit a hash total for a specific element in the transaction set

Element Summary:

Ref	Id	Element Name	Req	Type	Min/Max	Usage
CTT01	354	**Number of Line Items**	M	N0	1/6	Must use

Description: Total number of line items in the transaction set

SE Transaction Set Trailer

Pos: 020   Max: 1
Summary - Mandatory
Loop: N/A   Elements: 2

User Option (Usage): Must use

Purpose: To indicate the end of the transaction set and provide the count of the transmitted segments (including the beginning (ST) and ending (SE) segments)

Element Summary:

Ref	Id	Element Name	Req	Type	Min/Max	Usage
SE01	96	**Number of Included Segments**	M	N0	1/10	Must use

Description: Total number of segments included in a transaction set including ST and SE segments

Ref	Id	Element Name	Req	Type	Min/Max	Usage
SE02	329	**Transaction Set Control Number**	M	AN	4/9	Must use

Description: Identifying control number that must be unique within the transaction set functional group assigned by the originator for a transaction set