



**LMI-DST:
COA EXCESS /METRICS
REPORT**

Release: 22 SEP 2016

USAMC- LOGSA

COA EXCESS/METRICS REPORT

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COA Excess Metrics / Reporting

1. Purpose: To provide a common picture when reporting excess equipment across the Army.

2. Concept/ Design Detail: Using the All Army (980K) COA run from DST’s COA/Auto-Sourcing module and the existing transactions (PSDs) within DST- SM and DST- ET build a reporting feature that allows users to visualize projected excess equipment and related moves based on the strategy and criteria of the All Army COA run. This capability will allow all users of DST to create and run reports considering projected excess (CSDs), planned and in execution excess (PSDs) and completed PSDs. This includes the ability to see excess over time and suspense dates. This COA run will run weekly allowing users to select multiple COA runs across a 24-month time frame.



Figure 1 Excess Metric Chart

3. Walkthrough: The following section contains general description of changes, rules and step by step instructions of how to use these capabilities.

A. General information:

1). The COA Excess Metrics/ Reporting capability resides in a new menu option named “Custom Reports.” It will also be selectable option within the MCOP tool.

Sourcing / Planning	Dashboards / Reports	User Defined	Administration	DST-SM
<ul style="list-style-type: none"> ◦ DST-SM Home ◦ Manual Sourcing ◦ Distribution/Turn-In ◦ Auto Sourcing ◦ Proposed Sourcing Decisions ◦ Divestiture Planner ◦ Blue Sky Planning 	<ul style="list-style-type: none"> ◦ Unit Distribution Plan ◦ Unit Distribution View ◦ Unit LIN Dashboard ◦ Friction LINs ◦ Asset Visibility ◦ Supply Viewer ◦ LIN Catalog 	<ul style="list-style-type: none"> ◦ Alerts ◦ LIN Plan Management ◦ My Customizations ◦ My Dashboards ◦ Custom Reports ◦ Email ◦ Filter Sets ◦ Sourcing Strategy 	<ul style="list-style-type: none"> ◦ DST-SM Users ◦ Force Administration ◦ Service Tasks ◦ System Administration 	<ul style="list-style-type: none"> ◦ Execution Tracking ◦ View Help ◦ About DST-SM

Figure 2 DST Main Menu

2). Custom Reports Module: this module contains a summary page that houses all of the users' custom built reports. Clicking on a reports name will open the report and allow users to select the various display options for that report. The reports will remain saved under the creating users name until deleted by the user.

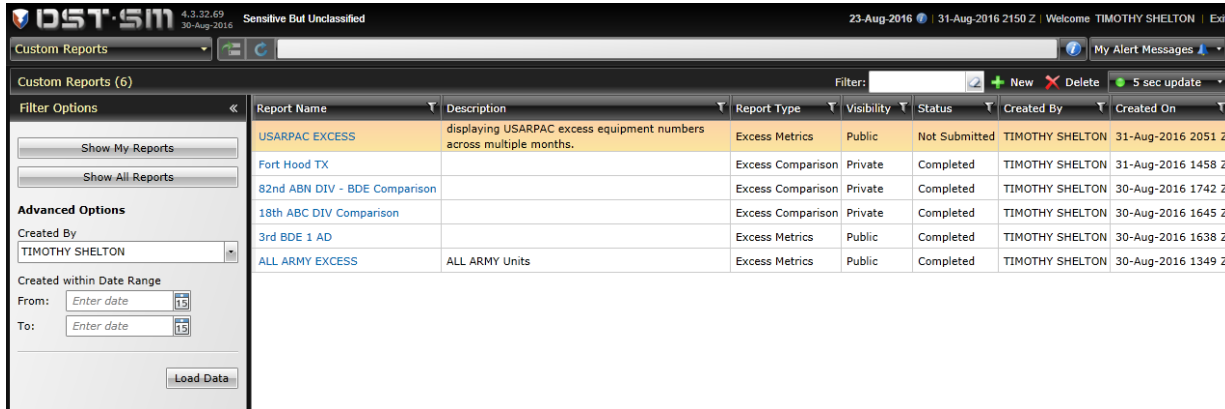


Figure 3 Custom Report home screen

3). There are two types of reports that can be created using this capability: Excess Metrics and Excess Comparison

a. Excess Metrics allow users to create a report to compare the same selected force element's excess numbers (based on the number of lateral transfers and turn-ins) across multiple COA run dates (up to 26 execution dates can be populated on the report). The selected force could be all Army units, an individual company or any size force in between.

b. Excess Comparison allows users to create a report to compare multiple force elements excess numbers across any single COA run. Users may select multiple force elements and compare their excess numbers across a single COA run.

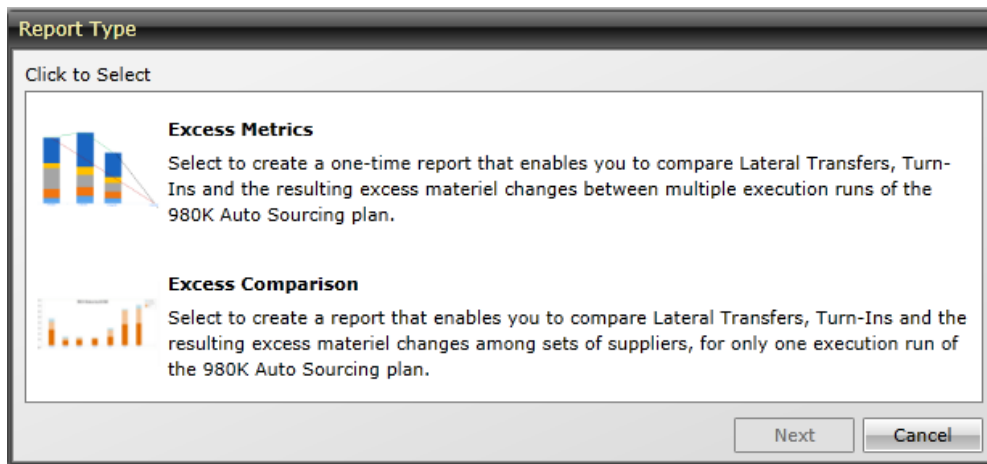


Figure 4 Report Type Dialogue Box

B. Report Data: The excess reporting module displays data using results from the Army's 980k COA run, existing PSDs and completed PSD information.

1). Projected Excess: This is computed by using the CSD data from the Army's 980K COA run. This is excess at the start of the run and excess out into the future.

2). Planned Excess: This is computed using existing PSD information. This includes all PSDs that are not closed, infeasible or DST Not Approved.

3). Completed Excess: This is computed by using completely closed PSD information.

4). Categories of Excess: the three types of excess (above) is further broken out into 15 categories:

MDL T/I PSDs
T/I PSDs
MDL Items w/o T/I PSDs
Excess Items w/o T/I PSDs
X-ACOM L/T PSDs
Internal L/T PSDs
External L/T PSDs
X-ACOM L/T w/o PSDs
Internal L/T w/o PSDs
External L/T w/o PSDs

a). MDL Turn-In PSDs: This represents those PSDs with a NIIN whose divestiture status is "Complete" divestiture on the MDL list and were open at the time of the COA execution date.

b). Current T/I PSD: This represents those PSDs that were open at the time of the COA execution date. This excludes the PSDs of MDL NIINs (complete divestiture) and those PSDs with a vetting status of DST NOT Approved.

c). MDL Items without Turn-In PSDs: This represents those CSDs created during the 980K COA run with a NIIN whose divestiture status is "Complete" divestiture on the MDL list at the time of the COA execution date.

d). Excess Items without T/I PSDs: This represents those CSDs created during the 980K COA run (excluding MDL NIINs) based on the Excess T/I sequences. These sequences are created after all optimization and cross-ACOM sequences within the 980K COA run.

e). X-ACOM (Cross-ACOM) Lateral Transfer PSDs: This represents those PSDs whose supplier and receiver have different ACOMs (within the AOS Force) and are open at the time of the COA execution date. For those UICs that do not have an ACOM (due to the UIC not falling under an ACOM/ASCC/DRU within the AOS Force Tree) it's ACOM will be considered "Unknown." PSDs (or CSDs) that are "Unknown" ACOM to "Unknown" ACOM they will be considered as internal ACOM. PSDs (or CSDs) that "Unknown" ACOM to "Known" ACOM will be considered Cross-ACOM.

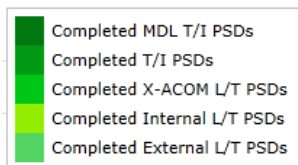
f). Internal Lateral Transfer PSDs: This represents PSDs whose receiver and supplier are part of the selected supply set / force tree node. For instance, if the branch of FORSCOM was selected all PSDs going to and coming from UIC contained in that branch would be considered Internal Lateral Transfer PSDS.

g). External Lateral Transfer PSDs: This represents PSDs whose receiver is not part of the selected supply set / force tree node but are within the same ACOM.

h). X-ACOM Lateral Transfer without PSDs: This represents CSDs created during the 980K COA run that are lateral transfers whose AOS ACOM of the supplier and receiver are not the same.

i). Internal Lateral Transfer without PSDs: This represents excess items (based on CSDs from the 980k COA run) that could be laterally transferred to fill a shortage internally to the selected supply set / force tree node where the receiver and supplier are within the same ACOM.

j). External Lateral Transfer without PSDs: This represents excess items (based on CSDs from the 980k COA run) that could be laterally transferred to fill shortages external to the selected supply set / force tree node where the receiver and supplier are within the same ACOM.



k). Completed MDL Turn-In PSDs: This represents PSDs that were completed between executions that were Turn-In PSDs with NIINs that were on the MDL list at the time of the run. Only fully complete PSD are counted (no “partial Credit”) and initial leg “Pass Through” PSDs are not counted.

l). Completed Turn-In PSDs: This represents PSDs that were completed between executions there were Turn-In PSDs (excluding MDL NIINs). Only fully complete PSD are counted (no “partial Credit”) and initial leg “Pass Through” PSDs are not counted.

m). Completed X-ACOM Lateral Transfer PSDs: This represents PSDs that were completed between executions that were Lateral Transfer PSDs whose AOS ACOM of the supplier and receiver are not the same. Only fully complete PSD are counted (no “partial Credit”) and initial leg “Pass Through” PSDs are not counted.

n). Completed Internal Lateral Transfer PSDs: This represents PSDs that were completed between executions that were Lateral Transfer PSDs laterally transferred to fill a shortage internally to the selected supply set / force tree node where the receiver and supplier are within the same ACOM.

o). Completed External Lateral Transfer PSDs: This represents PSDs that were completed between executions that were Lateral Transfer PSDs to fill shortages external to the selected supply set / force tree node where the receiver and supplier are within the same ACOM.

C. Creating an Excess Metrics Report (Filter Options):

- 1). Click on the “New” icon on the top right portion of the Custom Reports Module.
- 2). On the Report Type dialogue box, select “Excess Metrics” and click “Next”
- 3). Using the “Add New Excess Metrics Report” dialogue box, input a Report Name and a description of the report. You also have the option of making the report private (“Creator”-only you can see it) or Public (visible by any user who can access the Custom Reports module).

Figure 5 Add New Metrics Report Dialogue Box

4). Click “Save” and the “Reports Options” pane will display.

Figure 6 Filter Options for Excess Metrics report

- a). The top portion of the pane houses the multiple Plan Executions that can be selected to display on the report. For each plan that is selected the report will return data produced during that COA run and the applicable PSD information for that time frame as well.
- b). “What to Count” this gives the option to count individual pieces or number of transactions (PSDs/CSDs) to display on the report.
- c). “LINS” use this selection to determine the LINS that you wish to be returned on the report.
- d). “Ignore Intra-Battalion Lateral Transfers:” clicking this option will omit any data on those Lateral Transfers that are occurring at the “AA” level or below. Normally, these types of transactions are optimization type transactions and do not effect a unit’s readiness posture.
- e). “Suppliers:” select the force that you want to be displayed in the report. There are three options for selecting force: Supply Sets, AOS Force Tree and the DST Force Tree.

6) Click “Run Report” to start building your desired report.

Note: the number of plan executions included, and size of force selected will determine the length of time required to run the report. Looking at two plan executions and a small force element (DIV size or smaller) will take minutes, while looking at the whole Army across 20 plan executions may take over an hour.

7). Once the report begins running the screen will display the message below. Users can then go back to the reports menu and build another report or go to any other DST screen.

The report is currently running and may take a few minutes to complete. You can remain on this page and the screen will refresh when the report is done. Alternatively, you can continue to use the rest of the application and return to view the report at a later time.



Figure 7 Report Running information

D. Creating an Excess Metrics report (Display Options):

1). Once the report has completed click on the report name from the Custom Reports home page to open the report.

2). When the report loads it defaults to “Display Options” tab. This tab allows users to refine the results displayed on the Excess Metrics graph.

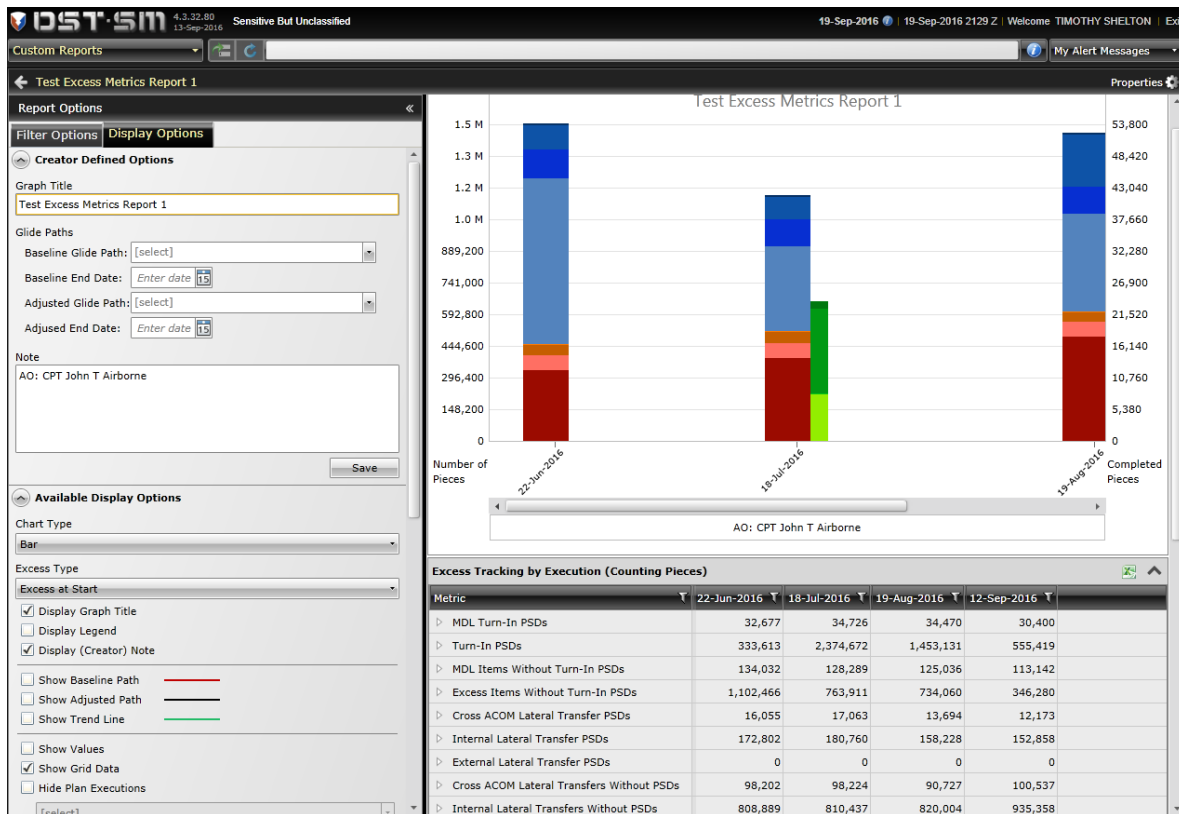


Figure 8 Completed Excess Metrics Report

Figure 9 Display Options Tab, Excess Metrics

Creator Defined Options:

a). **Graph title:** This field will default to the name of the report but can be changed and saved.

b). **Glide Paths:** This section allows the user to build either/or a Baseline or Adjusted glide path. The Baseline glide path will start the glide path from the oldest COA run date and the Adjust glide path will start from the newest COA run date. Users can specify the end date for both types of glide paths.

c). **Note:** This section allows users to add notes related to the report.

Available Display Options:

d). **Chart type:** Choose from Bar, Line or Line stacked display options for the report.

e). **Excess Type:** Choose from Excess at start, Projected Excess or Total. Selecting Excess at start will only display numbers for those transactions (projected, planned and in execution) that have a planning estimate date (CSDs) or suspense date (PSDs) that occurred on or before the sourcing start date of the COA run. Selecting Projected will only display numbers of those transactions that have a planning estimate date or suspense date after the sourcing start date of the COA run. Selecting Total will combine both the projected and the Excess at start numbers.

f). **Display Graph Title, Legend and Note:** Selecting or unselecting these options will display or remove these elements from the graph.

g). **Show Baseline path, Adjusted path and Trend line:** Selecting or unselecting these options will display or removed these elements from the graph.

****Note: Baseline and Adjusted baseline glide paths require the user to set the criteria for these options in the creator defined options above.**

h). **Show Values:** Selecting this box will display values in the bar graph.

i). **Show Grid Data:** Selecting this box will display the grid data below the graph.

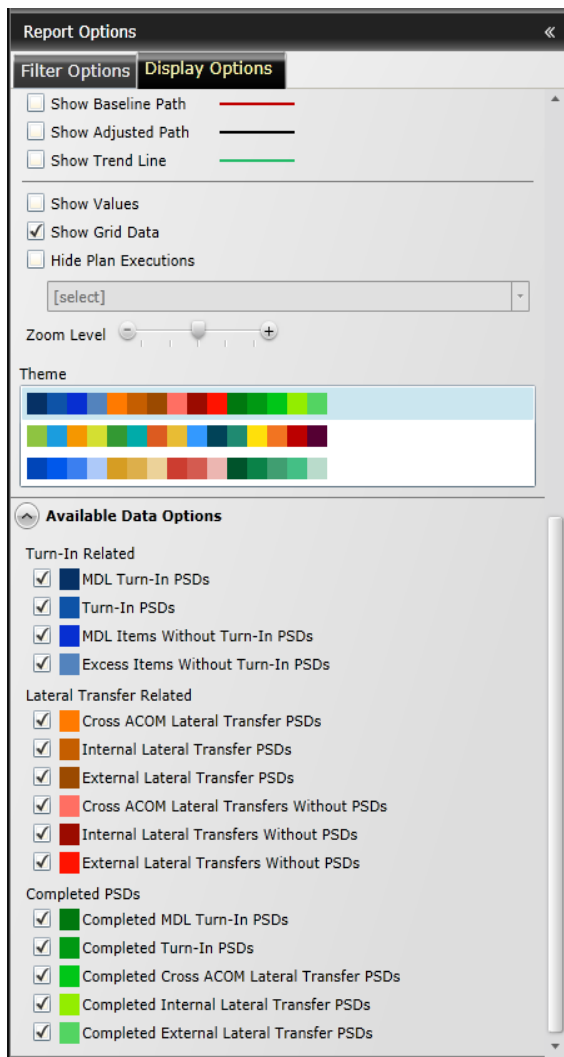


Figure 10 Display Options, Excess Metrics Cont.

j). **Hide Plan Executions:** This option allows users to remove one or more plan executions from the graph.

k). **Zoom Level:** This slide scale will change the zoom level of the displayed graph.

l). **Theme:** This allows users to select the color scheme for the displayed graph.

m). **Available Data options:** Selecting or unselecting any of these options allow users to select what data elements are displayed in the graph.

****Note: Unselecting any of these data elements will remove them from the graph/chart, however they will remain in the grid data.**

****Note: Clicking the double arrows at the top right of the Report options to collapse the Report Options pane.**



Figure 11 Completed Excess Metrics with Grid Data

n). The right side of the screen contains three panes:

1. Excess Metrics Chart
2. Excess Tracking by Execution (grid data)
3. Projected Excess for Last Execution (grid data over time).

****Note:** Clicking the arrows at the upper right of each pane will collapse or expand these sections

E. Creating an Excess Comparison Report

- 1). Click on the “New” icon on the top right portion of the Custom Reports Module.
- 2). On the Report Type dialogue box, select “Excess Comparison” and click “Next”
- 3). Using the “Add New Excess Comparison Report” dialogue box, input a Report Name and a description of the report. You also have the option of making the report private (“Creator”-only you can see it) or Public (visible by any user who can access the Custom Reports module).
- 4). Click Save and the “Reports Options” pane will display.
 - a). **Select Input Parameters:** This portion of the report options allows users to select the COA run to use for the comparison report. Click on any plan execution to select it for the report.

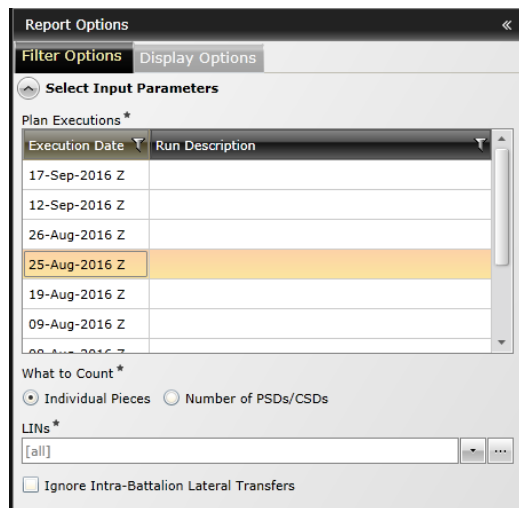


Figure 12 Filter Options, Excess Comparison report

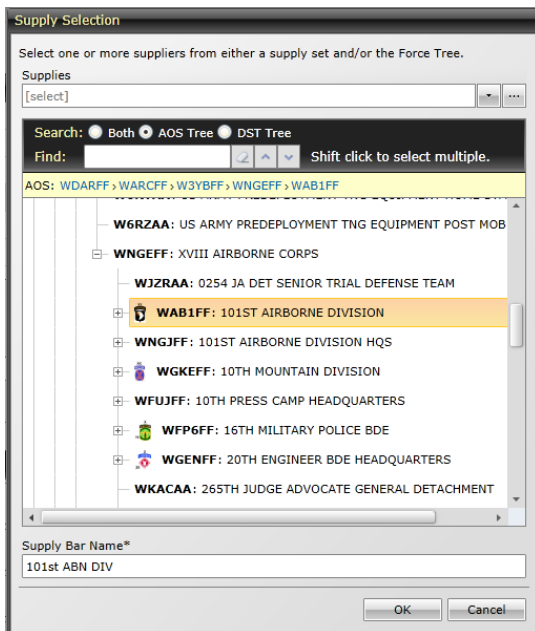
- b). **What to Count:** Select individual pieces of equipment or number of PSDs/CSDs (transactions)
- c). **LINs:** Select an individual LIN or a LIN set. The default option is all LINs.
- d). **Ignore Intra-Battalion Later Transfers:** if selected, this option will ignore all lateral Transfers that are going from units with UICs that contain the same first four.

e). Define Bar Groupings and Display Names: This portion of the report options allows users to define which force elements/supply sources to compare on the report. Up to 13 separate force elements/ Supply sources may be selected on one comparison report.

f). Clicking on the bar will open the Supply Selection dialogue box. Using either supply filter sets, the AOS or DST Force trees, select what force element or supply source will be counted for that bar.

****Note: When using either Force Tree, you can multi-select (select multiple units) by using CTRL+click or Shift+click.**

The Supply Bar Name is the name that will appear on the graph (and grid data) on the report.



Click "OK" and add any additional Supply Bars to your comparison report.

Figure 13 Supply Selection, Excess Comparison report

g). Once all of the supply bars are added, click "Run Report."

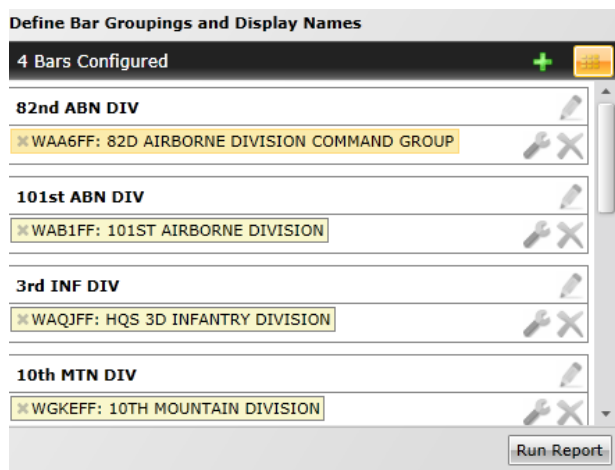


Figure 14 Bar Groupings, Excess Comparison report

h). Once the report has completed, click on the report name from the Custom Reports screen to open the report.

i). Much like the Excess Metrics report, the Comparison report has the ability to customize many of the graph/chart options. The Comparison report does not provide glide path options, you cannot ignore any executions (since this report is based on one execution) and the Grid data does not contain a roll up of grid data over time.

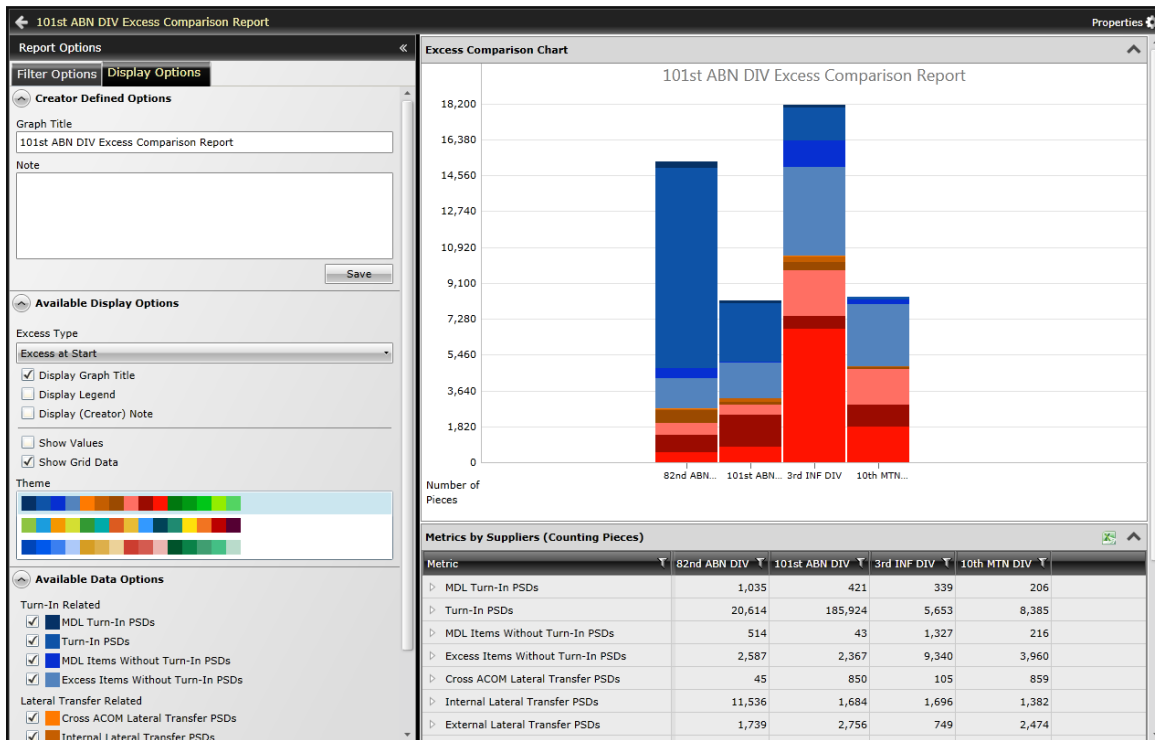


Figure 15 Completed, Excess Comparison report

F. Grid Data: Both reports (Excess Metrics and Excess Comparison) provide the grid data below the graph/chart area. These data grids provides the numbers behind the graph/chart displayed above the data grid. To export either of the data grids, click on the Excel icon at the upper right of the respective data grid.

1). Excess Metrics Grid Data:

a). Excess Tracking by Execution: This displays the numbers for each execution selected for the report broken out by execution date. The default display show the total number (Excess at start and Projected Excess), clicking the arrow to the left of the metric will break out this number into Excess at start and Projected Excess.

Excess Tracking by Execution (Counting Pieces)					
Metric	22-Jun-2016	18-Jul-2016	19-Aug-2016	12-Sep-2016	
MDL Turn-In PSDs	32,677	34,726	34,470	30,400	
Excess at Start	9,892	9,397	8,794	12,486	
Projected Excess	22,785	25,329	25,676	17,914	
Turn-In PSDs	333,613	2,374,672	1,453,131	555,419	
MDL Items Without Turn-In PSDs	134,032	128,289	125,036	113,142	
Excess Items Without Turn-In PSDs	1,102,466	763,911	734,060	346,280	
Cross ACOM Lateral Transfer PSDs	16,055	17,063	13,694	12,173	
Internal Lateral Transfer PSDs	172,802	180,760	158,228	152,858	
External Lateral Transfer PSDs	0	0	0	0	
Cross ACOM Lateral Transfers Without PSDs	98,202	98,224	90,727	100,537	
Internal Lateral Transfers Without PSDs	808,889	810,437	820,004	935,358	
External Lateral Transfers Without PSDs	0	0	0	0	
Completed MDL Turn-In PSDs	—	1,307	5,413	1,991	
Completed Turn-In PSDs	—	14,391	36,404	20,417	
Completed Cross ACOM Lateral Transfer PSDs	—	161	555	152	
Completed Internal Lateral Transfer PSDs	—	7,946	11,327	7,243	
Completed External Lateral Transfer PSDs	—	0	0	0	

Figure 16 Grid Data, Excess Tracking by Execution

b). Projected Excess for Last Execution: This displays the numbers of the most recent execution selected (looking at the example above this would display the results for the 12 SEP 16 COA Execution) for the report and breaks out the numbers across time based on suspense date (planning estimate date for CSDs).

Projected Excess for Last Execution (Counting Pieces)											
Metric	30-Sep-2016	31-Oct-2016	30-Nov-2016	31-Dec-2016	31-Jan-2017	28-Feb-2017	31-Mar-2017	30-Apr-2017	31-May-2017	30-Jun-2017	
MDL Turn-In PSDs	2,589	1,865	4,837	4,032	168	182	36	40	6	3	
Turn-In PSDs	36,344	19,619	38,813	189,339	4,990	3,884	2,963	843	426	2	
MDL Items Without Turn-In PSDs	207	234	85	21	17	1	0	0	7		
Excess Items Without Turn-In PSDs	20,865	25,109	7,695	15,528	931	2,411	709	2,237	1,927		
Cross ACOM Lateral Transfer PSDs	2,155	557	4,306	69	393	323	8	21	37		
Internal Lateral Transfer PSDs	19,064	22,452	24,962	7,704	2,476	2,187	1,175	90	1,391	1	
External Lateral Transfer PSDs	0	0	0	0	0	0	0	0	0	0	
Cross ACOM Lateral Transfers Without PSDs	2,759	4,527	165	123	297	104	11	22	102		
Internal Lateral Transfers Without PSDs	80,908	72,471	6,184	2,926	6,339	9,887	843	246	5,234	2	
External Lateral Transfers Without PSDs	0	0	0	0	0	0	0	0	0	0	

Figure 17 Grid Data, Projected Excess for last Execution

****Note: The Projected Excess for Last Execution data grid, breaks-out the “Projected Excess” Numbers only. “Excess at Start” numbers are not counted in this grid.**

2. Excess Comparison Grid Data:

a. Metrics by Suppliers: This displays the numbers for each selected supply set / force tree node within the Excess Comparison report. Like the Excess Metrics grid data, the default is to show the total excess (Excess at start + Projected Excess). Clicking the arrow next to the metric will breakout these values.

Metrics by Suppliers (Counting Pieces)				
Metric	82nd ABN DIV	101st ABN DIV	3rd INF DIV	10th MTN DIV
MDL Turn-In PSDs	1,035	421	339	206
Turn-In PSDs	20,614	185,924	5,653	8,385
Excess at Start	10,178	2,988	1,685	138
Projected Excess	10,436	182,936	3,968	8,247
MDL Items Without Turn-In PSDs	514	43	1,327	216
Excess at Start	497	42	1,326	215
Projected Excess	17	1	1	1
Excess Items Without Turn-In PSDs	2,587	2,367	9,340	3,960
Cross ACOM Lateral Transfer PSDs	45	850	105	859
Internal Lateral Transfer PSDs	11,536	1,684	1,696	1,382
External Lateral Transfer PSDs	1,739	2,756	749	2,474
Cross ACOM Lateral Transfers Without PSDs	788	686	2,587	1,845
Internal Lateral Transfers Without PSDs	2,126	2,766	2,251	3,104
External Lateral Transfers Without PSDs	914	1,071	9,577	2,342

Figure 18 Grid Data, Comparison Metrics report

b). The “Suppliers Over Time” Data grid does not have a roll-up view. To view the numbers over time, click on the arrow next to one of the units to expand.

Suppliers Over Time (Counting Pieces)										
Metric	31-Aug-2016	30-Sep-2016	31-Oct-2016	30-Nov-2016	31-Dec-2016	31-Jan-2017	28-Feb-2017	31-Mar-2017	30-Apr-2017	31-May-2017
82nd ABN DIV										
MDL Turn-In PSDs	126	9	37	67	440	0	0	0	0	
Turn-In PSDs	264	1,122	673	697	6,667	699	24	102	0	
MDL Items Without Turn-In PSDs	0	0	497	0	1	16	0	0	0	
Excess Items Without Turn-In PSDs	0	0	1,772	18	89	629	23	38	0	
Cross ACOM Lateral Transfer PSDs	0	0	7	2	0	1	0	5	0	
Internal Lateral Transfer PSDs	1	28	264	7,112	3,218	43	26	116	0	
External Lateral Transfer PSDs	18	103	41	76	696	0	0	4	0	
Cross ACOM Lateral Transfers Without PSDs	0	0	585	0	27	0	0	0	0	
Internal Lateral Transfers Without PSDs	0	0	1,119	48	276	190	130	83	0	
External Lateral Transfers Without PSDs	0	0	645	71	12	7	26	0	0	
101st ABN DIV										
3rd INF DIV										
10th MTN DIV										

Figure 19 Grid Data, Suppliers Over Time (expanded)

G. Changes to User Management: To support the availability of this reporting module from within the MCOP module, the DST viewer role will automatically be granted to any LIW basic user. There will no longer be a need for any user to SAR for the DST viewer role once they have an LIW basic account.

H. Changes to Blue Sky Planning: When creating or editing Blue Sky plans there is now an additional option to make the plan “Public.” This option will make the plan viewable by any user who has a role that includes Blue Sky planning and will make COA runs that use that Blue Sky Plan viewable by any user who can view Auto-Sourcing.

Add Blue Sky Plan

Blue Sky Plan Name

Plan Description (Optional)

Created On:
 Last Modified On:
 Last Modified By:

Visibility: Owners Public

* Only owners can edit the plan, regardless of visibility status.

Figure 20 Blue Sky Plan Properties dialogue

I. Changes to Divestiture Planning/ MDL NIIN management: The Divestiture Planner module was enhanced to include an MDL NIINs tab. This purpose of the tab is to provide a single location to manage and display those NIINs that are included in the Master Divestiture List (MDL).

DST-SM 4.3.32.80 Sensitive But Unclassified 21-Sep-2016 21-Sep-2016 2326 Z Welcome TIMOTHY SHELTON

Divestiture Planner

Existing Divestiture Plans MDL NIINs

NIINs (3,094)

NIIN	Nomenclature	LIN	Divestiture Status	CIIC	FSC	SCMC	Sustainment Cost	Storage Cost	DEMIL Prep	Depot Sustainment Cost
000000158	LIGHT SET,DENTAL OPERATING,FIELD	NA200F	Complete Divestiture	U	6520	84	\$0.00	\$2,800.43	\$0.00	
000014132	SHOP SET,AVIATION I	MB203N	Complete Divestiture	U	4920	7A	\$0.00	\$4,228.02	\$100.00	
000016487	BELT,INDIVIDUAL EQUIPMENT	DA6502	Complete Divestiture	U	8465	2F				
000017726	HEATER,DUCT TYPE,PORTABLE	94148N	Complete Divestiture	U	4520	7B	\$0.00	\$28.32	\$320.00	
000035267	TOOI KIT PWR TN ACFT	W4923R	Complete Divestiture	U	5180	2A				

Figure 21 MDL NIINs tab in Divestiture Planner

J. Changes to Auto-Sourcing: The Auto-Sourcing landing page was modified to simplify viewing and comparing multiple executions of the same COA run. When the landing page first loads the multiple executions are consolidated under the name of the COA run. Clicking the arrow to the right of the COA name will expand the selection to view the multiple executions of that COA.

DST-SM 4.3.32.80 Sensitive But Unclassified 21-Sep-2016 21-Sep-2016 1617 Z Welcome TIMOTHY SHELTON

Auto Sourcing Owned By: TIMOTHY SHELTON Last Run Anytime

Sourcing Plans (111)

Name	Run History	Number Runs	Sourcing Timespan	Owner	Last Run	Temp COAs Expire	COAs	Authorization Type
980K V3 (980k COA 2.3)	17-Sep-2016 1000 Z	11	17-Sep-2016 to 17-Sep-2018	TIMOTHY SHELTON	17-Sep-2016 1003 Z to 17-Sep-2016 1649 Z	19-Sep-2018	COA 1	980K V4 Bluk
980K V2.2 (980k COA v2 18 APR 16) 13 JUN 16	22-Jun-2016 1734 Z	2	06-Aug-2016 to 06-Aug-2018	TIMOTHY SHELTON	22-Jun-2016 1735 Z to 23-Jun-2016 0031 Z	25-Jun-2018	COA 1	980k COA v2
Test Source from OP PROJ & APS	13-Jun-2016 1833 Z	1	28-Jul-2016 to 28-Jul-2018	TIMOTHY SHELTON	13-Jun-2016 1833 Z to 13-Jun-2016 1833 Z	Expired	COA 1	TAADS
980K V2.2 (980k COA v2 18 APR 16) 9MAY_test	11-May-2016 2128 Z	3	25-Jun-2016 to 25-Jun-2018	TIMOTHY SHELTON	11-May-2016 2129 Z to 12-May-2016 0449 Z	Expired	COA 1	980k COA v2
980K V2.2 (980k COA v2 18 APR 16) Cinco de mayo	05-May-2016 1855 Z	1	19-Jun-2016 to 19-Jun-2018	TIMOTHY SHELTON	05-May-2016 1854 Z to 06-May-2016 0113 Z	Expired	COA 1	980k COA v2
980K V2.2 (only source from DEPOT)	21-Apr-2016 2059 Z	1	05-Jun-2016 to 05-Jun-2018	TIMOTHY SHELTON	21-Apr-2016 2100 Z to 21-Apr-2016 2355 Z	Expired	COA 1	980k COA v2
980K V2.2 (980k COA v2 18 APR 16)(Removed APS&LRC)	21-Apr-2016 2038 Z	1	05-Jun-2016 to 05-Jun-2018	TIMOTHY SHELTON	21-Apr-2016 2038 Z to 22-Apr-2016 0126 Z	Expired	COA 1	980k COA v2
980K V2.1 (980k COA v2 18 APR 16)(removed AMC)	21-Apr-2016 1659 Z	1	05-Jun-2016 to 05-Jun-2018	TIMOTHY SHELTON	21-Apr-2016 1659 Z to 21-Apr-2016 2155 Z	Expired	COA 1	980k COA v2

Figure 22 Auto-Sourcing home screen

Name	Run History	Number Runs	Sourcing Timespan	Owner	Last Run	Temp COAs Expire	COAs	Authorization Type
980K V3 (980K COA 2.3)	17-Sep-2016 1000 Z	11	17-Sep-2016 to 17-Sep-2018	TIMOTHY SHELTON	17-Sep-2016 1003 Z to 17-Sep-2016 1649 Z	19-Sep-2018	COA 1	980K V4 Blue Sky Plan
Run Date	Sourcing Timespan	COA Name: COA 1	Status: ✔ Completed	Auth Type: 980K V4 Blue Sky Plan	CSD Counts	Fill % and Pieces		
17-Sep-2016 1000 Z	17-Sep-2016 to 17-Sep-2018				Lateral Transfer: 210,462	Receiver: 0.95 %	Before	After
Length of Run	Data Expires On				Depot Issued: 6,037	Supplier: 3.88 %	83.69 %	Land
17-Sep-2016 1003 Z to 17-Sep-2016 1649 Z	19-Sep-2018				Turn-In: 97,113	Receiver Tot. Pcs.: 100,325	67.94 %	Air
					Summary By Type: Lateral Transfer: 210,462 Depot Issues: 6,037 Other: 4,879 Turn-In: 97,113 Depot Production: 642 Ne			Sea
Run Date	Sourcing Timespan	COA Name: COA 1	Status: ✔ Completed	Auth Type: 980K V4 Blue Sky Plan	CSD Counts	Fill % and Pieces		
12-Sep-2016 1626 Z	12-Sep-2016 to 12-Sep-2018				Lateral Transfer: 230,844	Receiver: 78.95 %	Before	After
Length of Run	Data Expires On				Depot Issued: 7,462	Supplier: 145.07 %	80.03 %	Land
12-Sep-2016 1628 Z to 13-Sep-2016 0115 Z	15-Sep-2018				Turn-In: 77,383	Receiver Tot. Pcs.: 6,496,759	63.41 %	Air
					Summary By Type: Lateral Transfer: 230,844 Depot Issues: 7,462 Other: 4,961 Turn-In: 77,383 Depot Production: 668 Ne			Sea
Run Date	Sourcing Timespan	COA Name: COA 1	Status: ✘ Error	Auth Type: 980K V4 Blue Sky Plan	CSD Counts	Fill % and Pieces		
10-Sep-2016 1000 Z	10-Sep-2016 to 10-Sep-2018				Lateral Transfer: 0	Receiver: -	Before	After
Length of Run	Data Expires On				Depot Issued: 0	Supplier: -	-	Land
10-Sep-2016 1003 Z ...	-				Turn-In: 0	Receiver Tot. Pcs.: -	-	Air
					Summary By Type: -		-	Sea
Run Date	Sourcing Timespan	COA Name: COA 1	Status: ✔ Completed	Auth Type: 980K V4 Blue Sky Plan	CSD Counts	Fill % and Pieces		
26-Aug-2016 1547 Z	10-Oct-2016 to 10-Oct-2018				Lateral Transfer: 209,869	Receiver: 82.98 %	Before	After
Length of Run	Data Expires On				Depot Issued: 6,276	Supplier: 153.85 %	84.01 %	Land
26-Aug-2016 1549 Z to 26-Aug-2016 2254 Z	28-Aug-2018				Turn-In: 98,039	Receiver Tot. Pcs.: 6,561,266	67.94 %	Air
					Summary By Type: Lateral Transfer: 209,869 Depot Issues: 6,276 Other: 4,815 Turn-In: 98,039 Depot Production: 758 Ne			Sea

Figure 23 Auto-Sourcing with a COA run expanded to show all runs of that COA

K. Changes to Filter Set Management: To help improve filter set management, the column names “Number of Owners” was changed to “Owners. This column will display all owners and the total count of owners of a particular filter set.

Name	Visibility	Count	Owners	Tag 1
#LT Sequence-All ERC A/P MTOE	public	1,374	(3) MICHAEL GAWINSKI; MISTY MISBAH;...	28 JULY 16
#TI Sequence-All ERC A/P MTOE	public	1,374	(3) MICHAEL GAWINSKI; MISTY MISBAH;...	28 JULY 16
#USAREUR 21 TSC SPO IM C (Cor)	public	37	(3) MARK RADEMACHER; ROBERT PARKER;...	ACCESS SET
#USAREUR 21 TSC SPO IM E (Neu)	public	66	(3) MARK RADEMACHER; ROBERT PARKER;...	ACCESS SET
#USAREUR 21 TSC SPO IM G	public	54	(3) MARK RADEMACHER; ROBERT PARKER;...	ACCESS SET
#USAREUR 21 TSC SPO IM H (Hen)	public	66	(3) MARK RADEMACHER; ROBERT PARKER;...	ACCESS SET
#USAREUR 21 TSC SPO IM J (Saln)	public	38	(3) MARK RADEMACHER; ROBERT PARKER;...	ACCESS SET

Figure 24 Filter Set Screen showing "Owners" column

4. Example Reports: This section walks users through creating multiple types of reports.

A. BDE level Comparison Report: Build a comparison report to compare excess numbers based on MDL items and turn-ins, across multiple BDE level organizations.

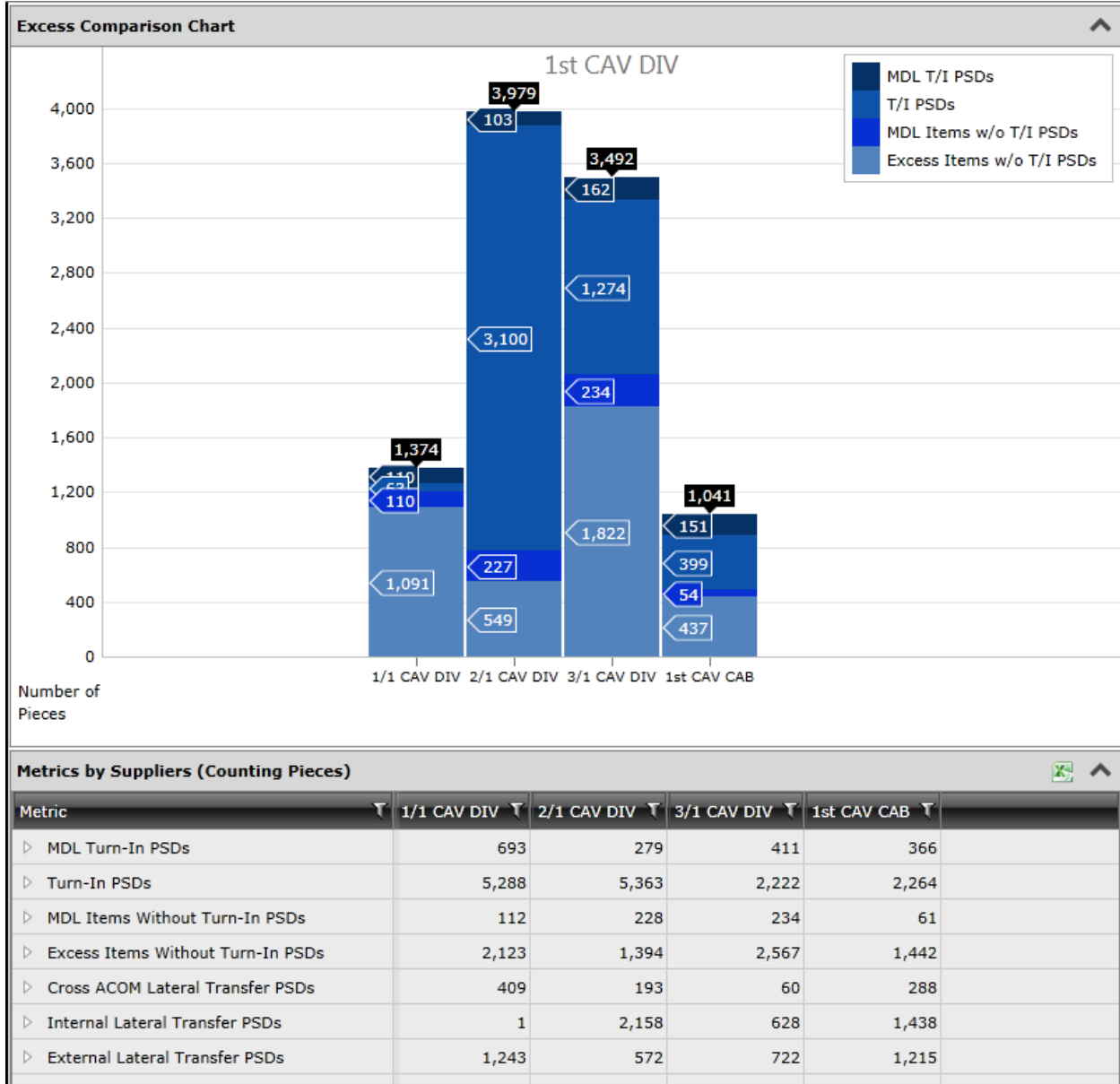


Figure 25 BDE level comparison Chart

- 1). From the "Custom Reports" menu, click "New" at the upper right corner of the Custom Reports home screen.
- 2). Select "Excess Comparison" from the "Report Type" dialog box and click "Next."
- 3) Name the report, add any Description information and select the visibility.

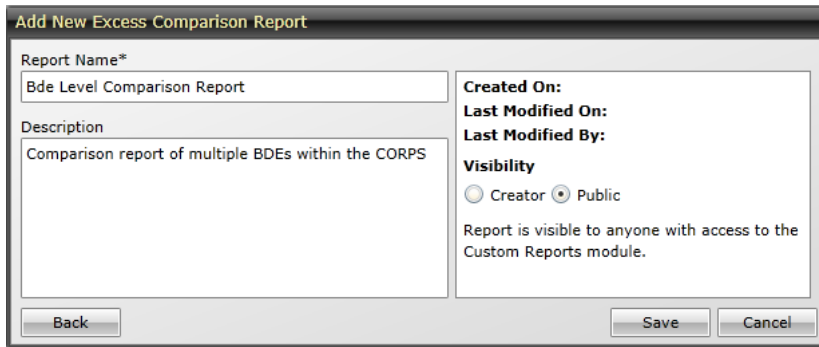


Figure 26 Add New Comparison Report dialogue box

4). The “Report Options” page will display. Select the execution date that you wish to use for the comparison. For this example we will select the most recent execution.

5). Select “What to Count,” individual pieces or number of PSDs/CSDs. I will select Individual Pieces for this example.

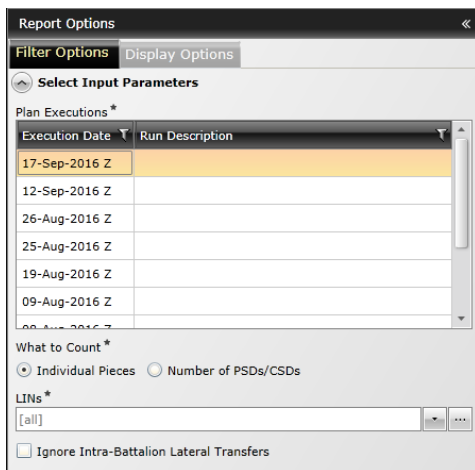


Figure 27 Filter Options for Comparison Report

6). If you wish to compile a report on a specific set of LINS, choose the LIN or LIN set to be used. For this example we will use the default “all LINS.”

7). If you wish not to count those Intra-Battalion Lateral Transfers, check the box. For this example I will leave the box unchecked, so that we count the total number of transactions /pieces across the BDE, regardless if the transaction would improve readiness or if it is simply mal-aligned within the battalion.

8). Next, we will select the BDE’s that we wish to include in this report. In the lower left hand pane (Define Bar Groupings and Display Names) click on the wrench icon in the first bar to select the first BDE. Repeat this process to include all of the BDEs that need to be included in the report. For this example, I included all of the BDEs within the 1st CAV division. Click “Run Report.”

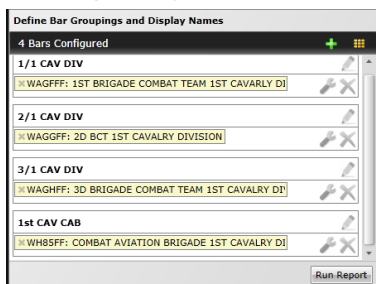


Figure 28 Bar Groupings for Comparison Chart

9). The report will begin to run and the screen will display the below message. **Note: while the report is running, you can use other modules within DST or create another report within the “Custom Reports” module.

The report is currently running and may take a few minutes to complete. You can remain on this page and the screen will refresh when the report is done. Alternatively, you can continue to use the rest of the application and return to view the report at a later time.



10). Once the report completes, click on the name of the report (if you are in the “Custom Reports” home page) to open the report.

11). When the report loads note that all 15 categories of data are displayed. At this point you can customize what is displayed in the graph/chart. For this report we want to display only MDL and Turn-In related items.

Figure 29 Display Options for Comparison Report

12). Under the “Available Display Options” select the Excess type to count. For this report we want to only count those excess items that are excess as of the start date of the COA Run. Therefore, we selected “Excess at Start.”

If we would want to see all of the excess (what is excess today and what will be excess in the future) select the “Excess Type” of “Total.” If you only want to see what is excess in the future, select the “Excess Type” of “Projected Excess.”

13). Check the “Display Graph Title” and “Graph Legend” checkboxes.

14). Check the “Show Values” the “Show Grid Data” checkboxes.

15). Uncheck all of the Lateral Transferred Related check boxes under Available Data Options.

B. BDE level Excess Metrics Report: Build an Excess Metrics report to compare a BDE's current excess numbers across multiple months.

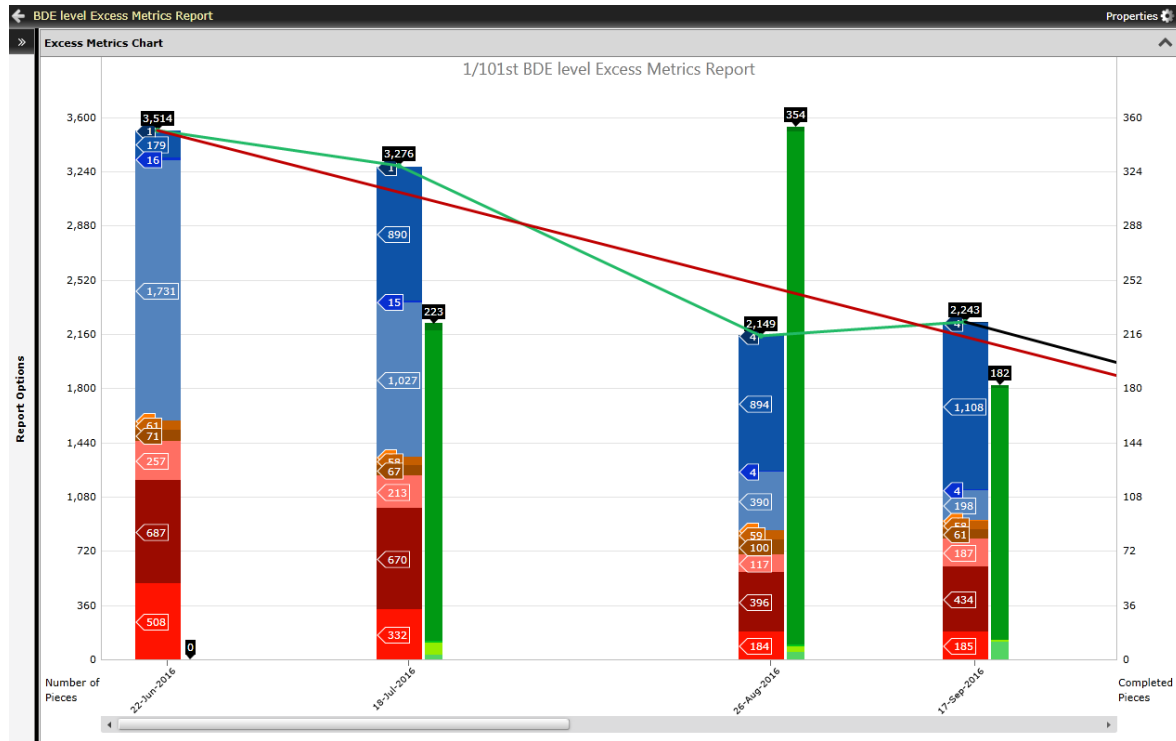


Figure 30 BDE level Excess Metrics Report

- 1). From the "Custom Reports" menu, click "New" at the upper right corner of the Custom Reports home screen.
- 2). Select "Excess Metrics Report" from the "Report Type" dialogue box and click "Next."
- 3) Name the report, add any Description information and select the visibility.

Figure 31 Add New Excess Metrics Report

4). The “Report Options” page will display. Select the execution dates that you wish to use for the comparison. For this example we will select an execution for each month from June to September. This will provide a view to determine the amount of projected excess, planned and in execution PSD and completed PSDs.

Execution Date	Run Description
<input checked="" type="checkbox"/> 17-Sep-2016 Z	
<input type="checkbox"/> 12-Sep-2016 Z	
<input checked="" type="checkbox"/> 26-Aug-2016 Z	
<input type="checkbox"/> 25-Aug-2016 Z	
<input type="checkbox"/> 19-Aug-2016 Z	
<input type="checkbox"/> 09-Aug-2016 Z	

5). Under “Select Input Parameters” choose “What to Count” as Individual Pieces.

6). If you wish to compile a report on a specific set of LINs, choose the LIN or LIN set to be used. For this example we will use the default “all LINs.”

7). If you wish not to count those Intra-Battalion Lateral Transfers, check the box. For this example I will leave the box unchecked, so that we count the total number of transactions /pieces across the BDE, regardless if the transaction would improve readiness or if it is simply mal-aligned within the battalion.

8). Next we will select the BDE level organization that we wish to compare across the Excess Metrics Report. For this selection, the options are either Filter Sets, the AOS force tree, or the DST force tree. For this example I selected the 1/101 ABN Div from the DST Force Tree.

9). Click “Run Report”

10). Once the run has completed, click on the name of the report from the “Custom Reports” home screen

to open the report.

11). In the “Display Options” Tab set the criteria for the Baseline Glide Path by selected the first run included in the report (22 JUN 16 in this example) and select an end date for the glide path.

12). Select an Adjusted Glide Path (this shows the adjust slope to completion based on what execution that is selected) by selecting the last execution (17 SEP 16 in this example).

13). Add any notes that you would like posted to the graph/chart and click “Save.”

**Note: you must click “Save” for the settings to be displayed on the graph/chart.

14). Under the “Excess Type” drop down select “Excess at Start.”

15). Check the “Show Baseline,” “Show Adjusted Path” and “Show Trend Line” check boxes.

16). Check the "Show Values" check box.

17). To view the graph/chart in full screen, uncheck the "Show Grid Data" check box and click on the double arrows at the top right of the Report Options pane to close it.

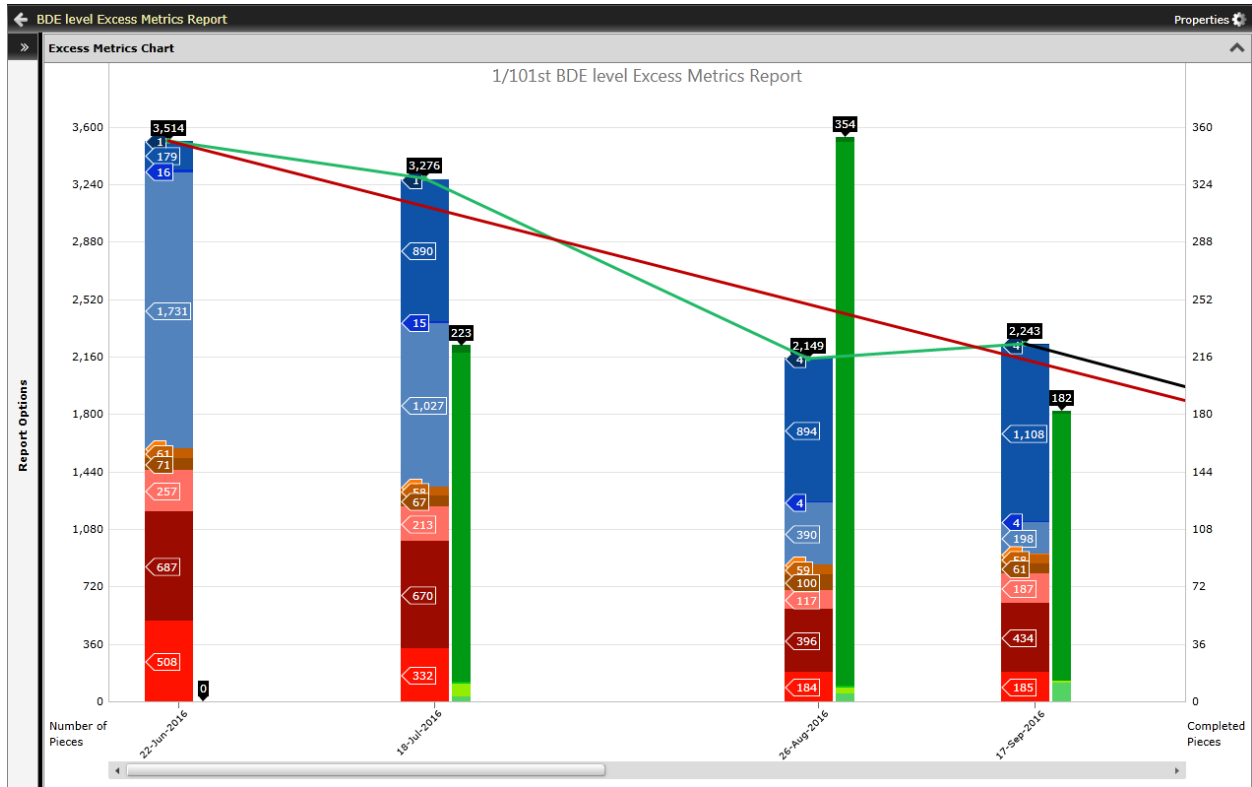


Figure 33 Completed BDE Level Excess Metrics Chart showing changes in excess over time

C. Compare a Corps and its Divisions in an Excess Comparison Report: Visualize a Corps total excess and breakout out all of its Divisions on the same comparison report.

- 1). From the "Custom Reports" menu, click "New" at the upper right corner of the Custom Reports home screen.
- 2). Select "Excess Comparison" from the "Report Type" dialogue box and click "Next."
- 3) Name the report, add any Description information and select the visibility.

Figure 34 Add New Excess Comparison Report Dialogue Box

- 4). The "Report Options" page will display. Select the execution date that you wish to use for the comparison. For this example we will select the most recent execution (17 SEP 16).

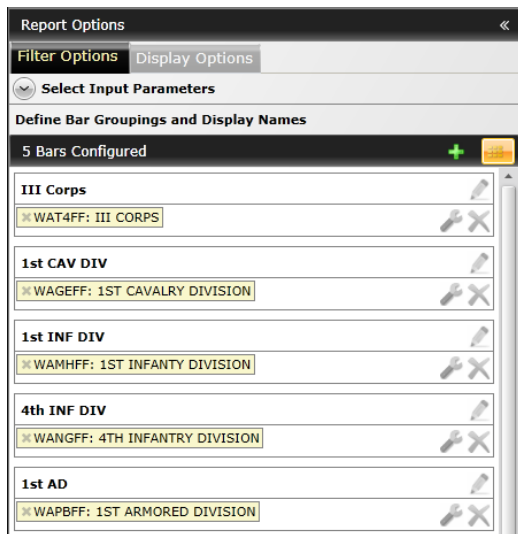
Figure 35 Filter Options for Comparison Metrics Report

- 5). Select "What to Count," individual pieces or number of PSDs/CSDs. I will select Individual Pieces for this example.

- 6). If you wish to compile a report on a specific set of LINS, choose the LIN or LIN set to be used. For this example we will use the default "all LINS."

- 7). If you wish not to count those Intra-Battalion Lateral Transfers, check the box. For this example I checked the box to only show those transactions that are above the BN level.

8). Next, we will select the units that we wish to include in this report. In the lower left hand pane (Define Bar Groupings and Display Names) click on the wrench icon in the first bar to select the first unit. Using either a supply set, or the AOS or DST force tree, repeat this process to include all of the units that need to be included in the report.



For this example, I used the DST force tree and included II Corps and all of the Divisions within that corps.

Click "Run Report."

Figure 36 Bar Groupings for a Comparison Metrics Report

9). The report will begin to run and the screen will display the below message.

The report is currently running and may take a few minutes to complete. You can remain on this page and the screen will refresh when the report is done. Alternatively, you can continue to use the rest of the application and return to view the report at a later time.



****Note: while the report is running, you can use other modules within DST or create another report within the "Custom Reports" module.**

10). Once the report completes, click on the name of the report (if you are in the "Custom Reports" home page) to open the report.

11). When the report loads note that all 15 categories of data are displayed. At this point you can customize what is displayed in the graph/chart. For this report we want to display all items.

12). Click on the "Display Legend" to populate the legend into the graph/chart.

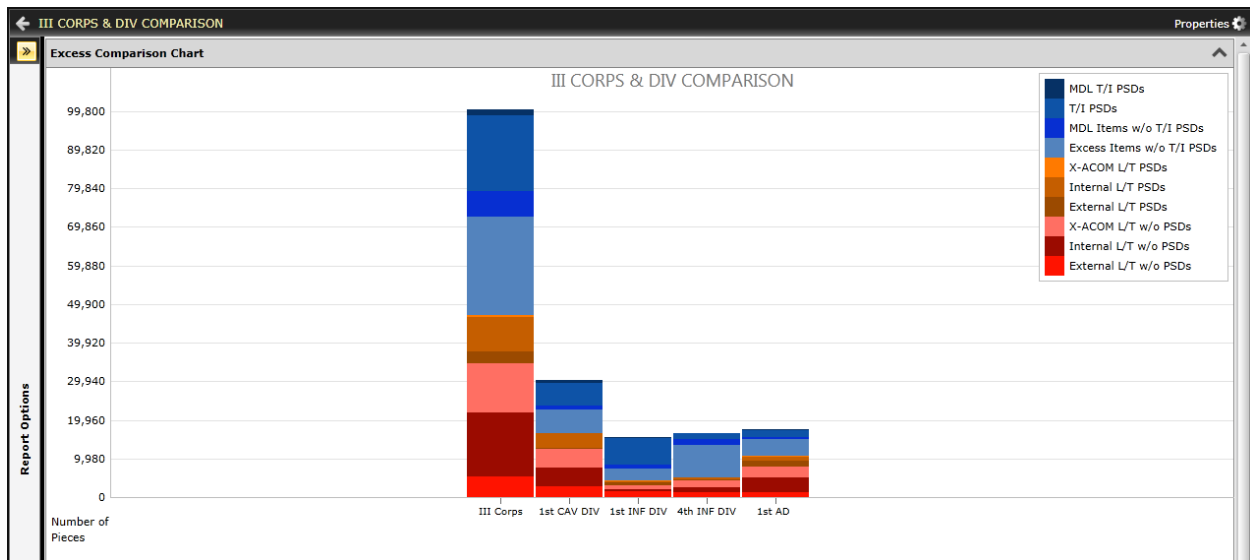


Figure 37 Completed Excess Comparison report

12). Below the graph/chart is the grid data.

Metrics by Suppliers (Counting Pieces)					
Metric	III Corps	1st CAV DIV	1st INF DIV	4th INF DIV	1st AD
MDL Turn-In PSDs	6,477	2,378	417	994	1,418
Turn-In PSDs	57,561	18,232	13,904	10,757	5,453
MDL Items Without Turn-In PSDs	6,589	1,003	984	1,559	544
Excess Items Without Turn-In PSDs	37,702	12,247	3,665	9,748	5,146
Cross ACOM Lateral Transfer PSDs	4,384	1,099	1,999	127	563
Internal Lateral Transfer PSDs	20,188	4,869	2,539	3,178	1,204
External Lateral Transfer PSDs	12,011	2,566	2,800	1,121	3,410
Cross ACOM Lateral Transfers Without PSDs	13,751	4,944	1,158	2,187	2,929
Internal Lateral Transfers Without PSDs	32,199	9,688	2,401	3,554	5,575
External Lateral Transfers Without PSDs	9,111	4,632	2,536	2,264	2,324

Figure 38 Grid Data for Corps and Division level Excess Comparison Report

D. Create an ACOM level line graph: to compare excess number and execution across multiple COA execution dates.

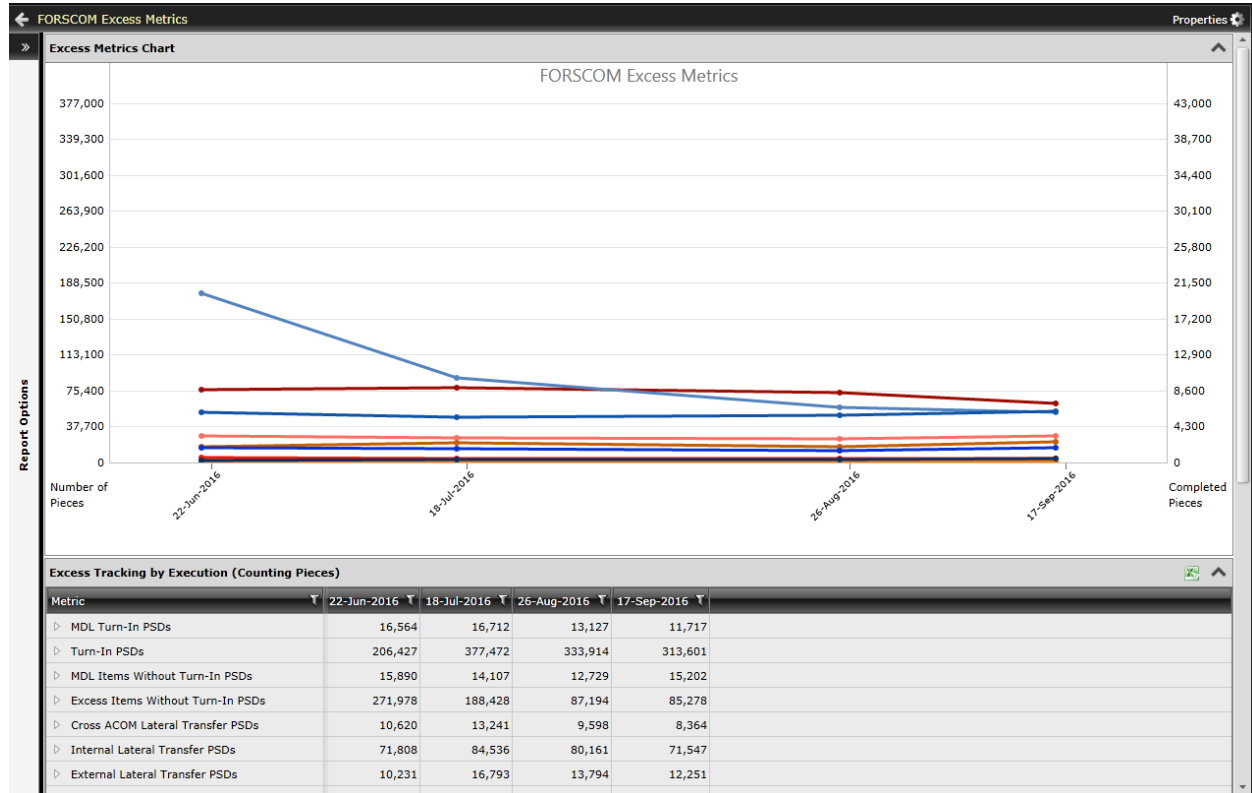


Figure 39 ACOM Level Excess Metrics Line Graph

- 1). From the "Custom Reports" menu, click "New" at the upper right corner of the Custom Reports home screen.
- 2). Select "Excess Metrics Report" from the "Report Type" dialogue box and click "Next."
- 3). Name the report, add any Description information and select the visibility.

Figure 40 Add New Excess Metrics Dialogue Box

4). The “Report Options” page will display. Select the execution dates that you wish to use for the comparison. For this example we will select an execution for each month from June to September. This will provide a view to determine the amount of projected excess, planned and in execution PSD and completed PSDs and how those numbers have changed across those months.

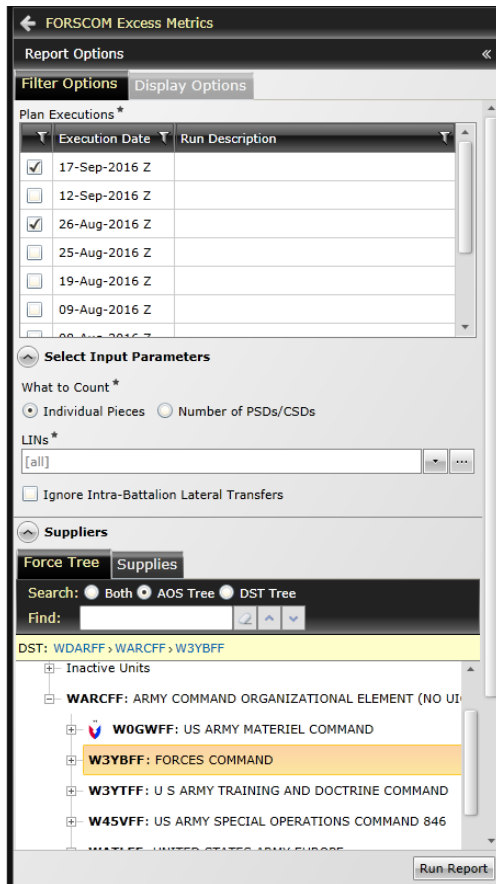


Figure 41 Filter Options for Excess Metrics Report

5). Under “Select Input Parameters” choose “What to Count” as Individual Pieces.

6). If you wish to compile a report on a specific set of LINS, choose the LIN or LIN set to be used. For this example we will use the default “all LINS.”

7). If you wish not to count those Intra-Battalion Lateral Transfers, check the box. For this example I will check the box since we only want to see those lateral transfer transactions that could improve readiness across the ACOM.

8). Next we will select an ACOM (FORSCOM) level organization that we wish to compare across the Excess Metrics Report. For this selection, the options are either Filter Sets, the AOS force tree, or the DST force tree. For this example I selected FORSCOM from the DST Force Tree.

9). Click “Run Report”

10). Once the run has completed, click on the name of the report from the “Custom Reports” home screen to open the report.

11). Add any notes that you would like posted to the graph/chart and click “Save.”

****Note: You must click “Save” for the settings to be displayed on the graph/chart.**

12). Under the “Chart Type” drop down box select “Line.”

13). Under the “Excess Type” drop down select “Excess at Start.”

14). Check the “Show Values” check box

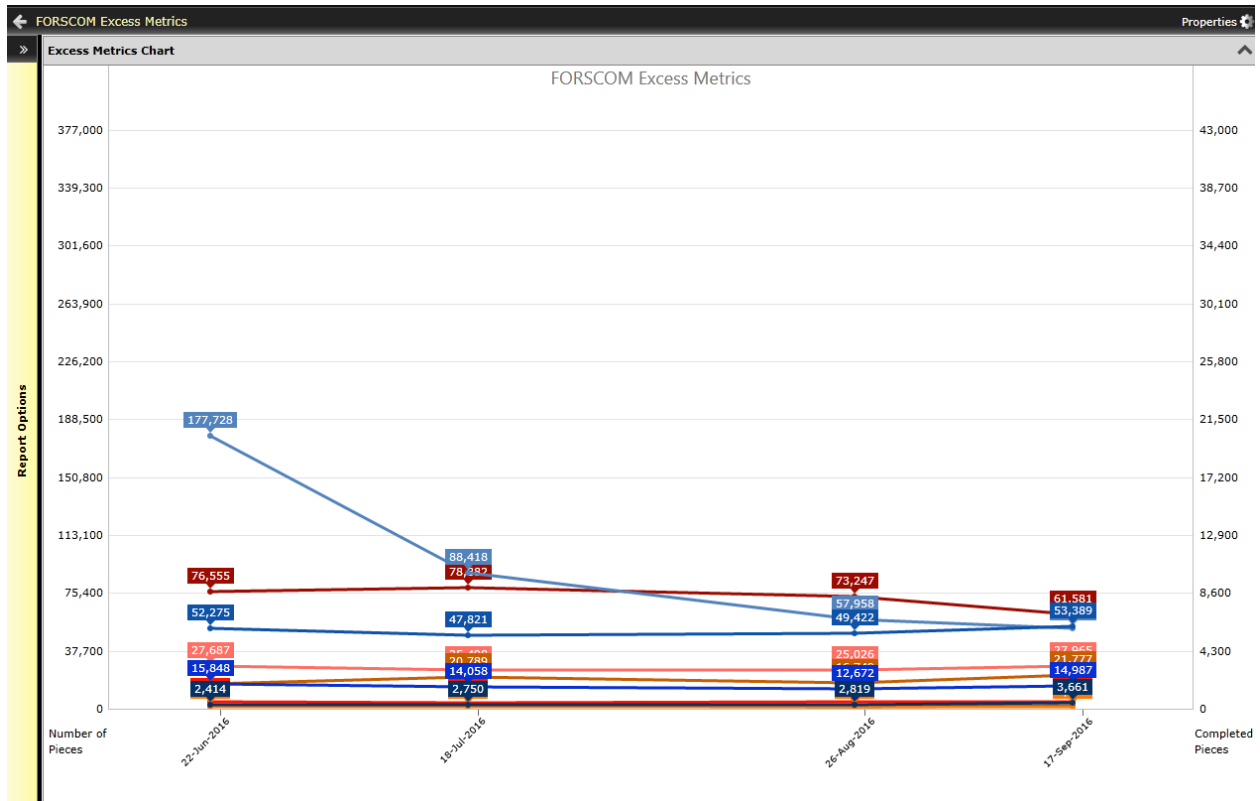


Figure 42 ACOM Level Excess Metrics Report