### Introduction

An online, automated Customer / Project Request Tracking Database System was developed for SLAC’s Controls Software Department in 2011.

- To capture the large volume of LCLS / FACET / Accelerator Test Facility operational enhancement and support requests otherwise directed via hallway conversations, emails, meetings, etc.
- To additionally capture the large volume of Project work, DOE, Accelerator Improvement Projects, ...
- To allow Leads, with Customer input, to prioritize resultant workload, as demand for resources consistently exceeds capacity of available resources
- To allow users to view all workload, resource assignments, status, priorities, etc, in one centralized repository available to all
- Emails and Reports keep everyone informed
- Project Funding is linked to each Request

### CATER Tracking Tool of Choice

SLAC’s Oracle and web based Comprehensive Accelerator Tool for Enhancing Reliability (CATER) tool (CATER) was leveraged to include Software (SW) Requests.

- Requests join the workflow of Problems and are of 2 types: a) Customer, b) Project Component
- Takes advantage of existing CATER user base, accounts, roles, familiar workflow and GUI, reports, advanced report builder, centralized database, development expertise
- To centralize customer requested enhancement/support work along with project work along with problem work along with Jobs in one database available to all
- New Job form aids and standardizes software release planning, reporting, scheduling, approvals, test and back out plans. Aids physicist in charge and Controls Deputy (CD) (CD is a controls software engineer in charge of releases on a weekly rotational basis).

### Workflow

- **SW Request**
  - Associated Task
  - Associated Job
- **Operator, Physicist, Engineer, Manager, Creates Problem or Request**
- **SW Problem (New)**
  - 2 Types:
    1. Customer Request - enhancement, maintenance, or support for Ops / Physicists
    2. Project Component - OER, Construction or Accelerator Improvement Project (API)
- **SW Request (New)**
- **Resource**
- **Lead Assign Resource**
  - Resource receives Email
  - “New” Email sent to Leads/List
- **Lead Assign to Problem**
  - Problem assigned to Leads
  - Problem assigned to Stakeholders
- **Software Problem (In Progress)**
  - Task(s)
  - Job(s) = SW Release Plan
  - Optional Project Job(s) contain description, resource(s), status, priority, etc
  - Task Status (In Progress or Rejected) To Close
  - Job Status = Active, Complete, Del NP
- **Resource(s) completa(s) all Task(s) and Job(s)**
  - “Review to Close” Email sent to Leads/List
- **Review to Close**
  - SW Request (Review to Close)
  - Reviewed for Closure by Leads
- **Lead Closes**
  - “Closed” Email sent to Leads/List
- **SW Request (Closed)**

### Dashboard

Once logged onto CATER, all Users default to their Home tab (Dashboard) that summarizes and links to all open “Problems Assigned to Me”, “Jobs Assigned to Me”, and “Requests and Tasks Assigned to Me.”