

# Integrated Management Tool For Controls Software Problems, Requests and Project Tasking at SLAC

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## 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).

## Dashboard

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

The Home Tab dashboard includes sections for 'Current Status Information', 'Problems Assigned to Me', 'Jobs Assigned to Me', and 'Requests and Tasks Assigned to Me'. It features a 'Problems Day by Status' bar chart and a 'New Problems by Date for the Last 15 Days' bar chart.

## Workflow

