INTEGRATED MANAGEMENT TOOL FOR CONTROLS SOFTWARE PROBLEMS, REQUESTS AND PROJECT TASKING AT SLAC*

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Project Goal

- Online, automated Customer / Project Request Tracking System was developed for SLAC's Controls Software Department

- 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 centralize *customer requests* along with *project work* along with *problem* work in one database available to all

- To allow Leads, with Customer input, to prioritize resultant workload, as demand consistently exceeds capacity of available resources

- To standardize Jobs (software release plans) for enhancement, support, and project work for release into production on machine development days.

Solution Outline

- SLAC's existing custom Oracle web based Problem Tracking tool (named CATER) was leveraged to include Requests (~5 FTE months)

- Takes advantage of existing CATER user base, accounts, roles, familiar workflow and GUI, reports, advanced report builder, centralized database, development expertise

- Project work (DOE, AIP funding,..) is entered in addition to customer requests. (Problems keep flowing…)

- New Job form aids and standardizes software release planning, reporting, scheduling, approvals, test and back out plans

- Provides personalized dashboard for all users for all Problems, Jobs, Requests and Tasks "Assigned to Me"

Conclusion

- Results achieved
  - Customers may view **all work** to a) better understand why their requests may not have resources allocated b) track and aid progress
  - Supervisors/Leads/Staff are **informed** of all work to catch potential issues, prioritize, re-task staff, track status, justify resource decisions
- Lessons learned
  - Particularly useful for tracking the large volume of requests that are small and/or of minor complexity, and require a few hours/days of many people
  - Integration of Jobs (software test/release plans; child of a Problem/Request) very efficient for machine development days
  - > 1 developer for Application Express (APEX) proved challenging
  - Requests constrained by Problem workflow and CATER release cycle
- What's next …
  - More training, enforcement of data entry; Roll out to other organizations at SLAC; More reporting – weekly reports, Gantt charting