

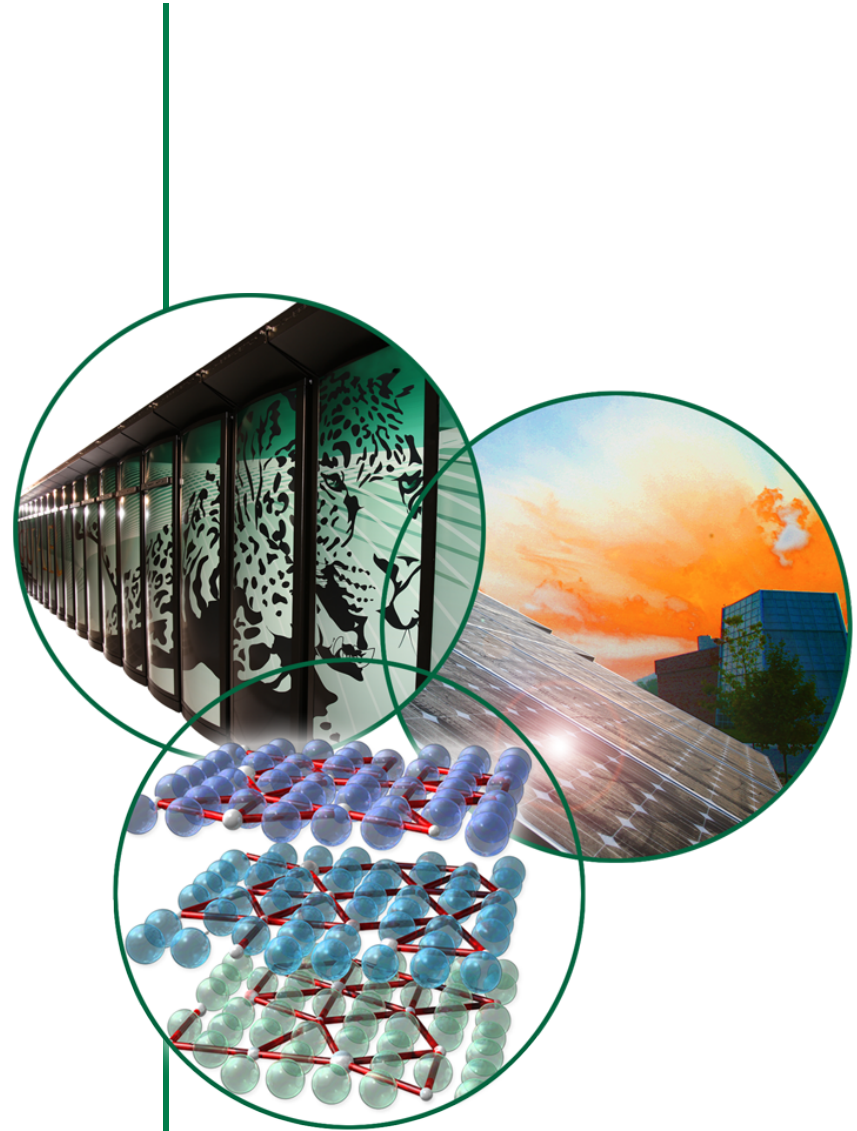
Controls Request Tracker

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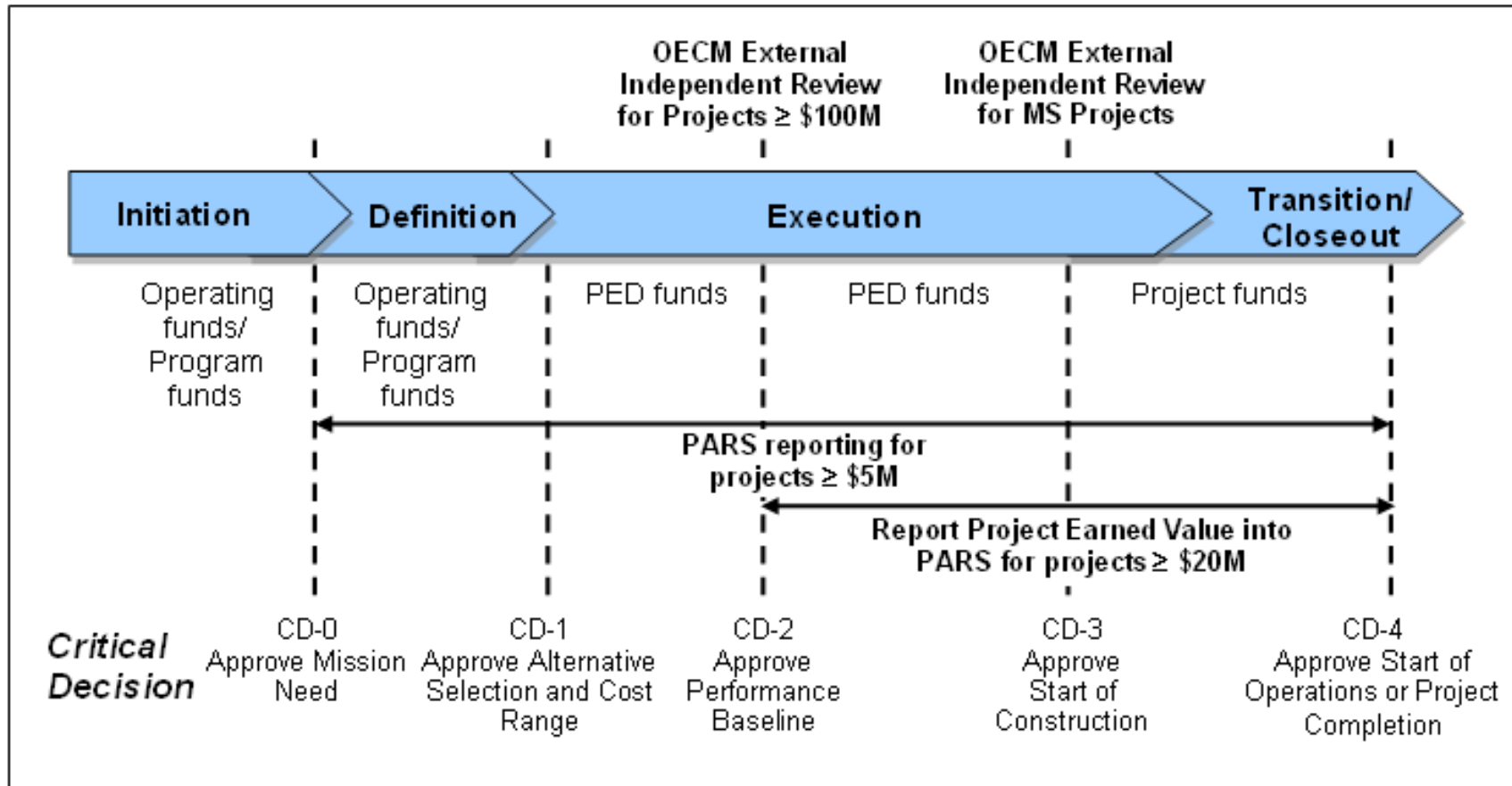
What is Controls Request Tracker?

- Tool to manage work requests, used by SNS Controls Group
- Based on **CPM** (Cosy Project Manager) a task tracking system developed and used by Cosylab
- Built on top of Request Tracker (RT) open source software and an RDB (MySQL or Oracle)
- We contracted with Cosylab to customize for our needs
- Captures requests, along with other relevant information, from multiple sources in a central database
- Each task is called a “ticket”
- Supports grouping tickets and hierarchy

Why CRT?

- DOE Order 413.3A Program and Project Management for the Acquisition of Capital Assets establishes a formal process for DOE construction projects
 - **5 Critical Decisions**
 - **Budget and schedule carefully managed**
 - **Support from Project Management professionals**
 - **Project milestones**
 - **Semi-annual reviews**
 - **Phased funding**

DOE Critical Decision Process



Source www.directives.doe.gov

Operations

- Successful completion of CD-4 triggers the start of “Project Operations”
- Formal project schedules and milestones replaced with metrics for production hours and availability
- Annual or less frequent reviews of technical achievements
- Groups manage their work less formally and without PM support
- Work includes commissioning, operational support, upgrades, improvements, smaller scale construction

Nature of the Work

- During Operations, work is driven by:
 - Meeting design goals that exceed CD-4
 - Addressing emerging availability issues
 - Building systems and features that were “descoped” during construction
 - Machine support
 - New features

Nature of the Work

- Frequent customer requests from many sources
 - In response to operational issues
 - Verbally, in meetings, hallways
 - By e-mail
- Requests made to Group Leader, Team Leader, Engineers
- Very high volume of requests exceeds available resources
- Important to carefully prioritize

Without CRT

- Task management varied by team or individual
- Work managed via strings of e-mails, spreadsheets, personal databases, other distributed files
- Difficult to get complete picture of any project all in one place
- No common way to communicate
- Getting current status information meant contacting someone for each project
- Impossible to prioritize work without an accurate, complete list of all requests

Tickets

- Tickets have many fields: Status, Type, System, Subsystem, Requestor, Developer, Dependencies, Dates, Effort
- Complete history of ticket is saved
- Accept updated through web interface or e-mail
- Supports attachments

Ticket Types and Status

Status

New - Unassigned

Open – Work In Progress

Stalled – Work can't proceed

Resolved – Completed

Rejected – Won't be completed

Deleted – Won't show in reports

Ticket Types

Problem

Maintenance

Configuration

Documentation

Improvement

Idea

Management

Milestone

How do we use CRT? – Phase I

- Controls Group/Team Leaders enter tickets and assign to developers based on requests from customers or problems reported in e-log
- Developers can enter, grab (volunteer), reply to, resolve, reassign, update tickets and add more information
- Tickets can be linked to predefined milestones such as “July 2010 Outage” and/or grouped to form projects
- Individuals use to manage work load, report status
- Group/Team Leaders get data to prioritize, balance work loads, track progress, justify requests for resources

CRT Interfaces and Reports

- Dashboard for each user that can be customized according to user preferences
- Predefined reports and an interface for user designed reports
- Simple and complex searches
- We have added custom reports

Create a Ticket

Create a new ticket - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://fics-web.sns.ornl.gov/crt/Ticket/Create.html?Queue=2

WebWHOS: List ICALEPCS 2009 Screenshot - Wikipedia, the fr... WebWHOS: List PALS Web Client Start Page Create a new ticket

SNS **cosylab** ORNL

Logged in as ksw | Preferences | Logout

Home
Simple Search
Complex Search
Tools
Configuration
Preferences
Manual

Create a new ticket

Search

Show basics · Show details

Create a new ticket

Queue: SNS-CNTRLS Status: new Owner: "Nobody in particular" <> (Nobody)

Responsible: Karen S. White

Requestor: whiteks@ornl.gov

Co: (Sends a copy to these people who will receive future updates.)

Admin Co: (Sends a copy to these people who will receive future updates.)

Subject:

Ticket Type: Problem, Maintenance, Configuration, Documentation, Improvement (Select multiple values)

Work Order: (Enter one value)

Attach file: Browse... Add More Files

Describe the issue below:

Create

Find: size Next Previous Highlight all Match case Done



Searches

Found 8 tickets - Mozilla Firefox

File Edit View History Bookmarks Tools Help

ornl.gov https://ics-web.sns.ornl.gov/crt/Search/Build.html

WebWHOS: List WebWHOS: List Found 8 tickets

  Logged in as ksw | Preferences | Logout

Found 8 tickets Search

Home
Simple Search
Complex Search
Tools
Configuration
Preferences
Manual

New Search · Edit Search · Advanced · **Show Results** · Bulk Update

Spreadsheet · RSS · iCal · Editable text

#	Subject Requestors	Status Created	Queue Last Updated	Owner Due	Priority Ticket Type
124	Develop Chipmunk IV b prototype wrightpa@ornl.gov	new 7 months ago	SNS-CNTRLS-Protection_Systems-Radiation_Protection-Chipmunk 7 months ago	9m4 3 days ago	0 Improvement
127	Chipmunk IV b prototype RSC presentation wrightpa@ornl.gov	new 7 months ago	SNS-CNTRLS-Protection_Systems-Radiation_Protection-Chipmunk 7 months ago	9m4 40 years ago	0 Improvement
173	LION development mossd@ornl.gov	open 7 months ago	SNS-CNTRLS-Protection_Systems 3 days ago	9m4	0 New
175	APPS spare parts mossd@ornl.gov	open 7 months ago	SNS-CNTRLS-Protection_Systems-APPS 3 days ago	9m4	0 Improvement
233	Improve EPICS screens for RMS III units in target building wrightpa@ornl.gov	new 7 months ago	SNS-CNTRLS-Protection_Systems-Radiation_Protection-RMS3 7 months ago	9m4 3 months ago	0 Improvement
956	Update Chipmunk EPICS detail screens wrightpa@ornl.gov	new 7 weeks ago	SNS-CNTRLS-Protection_Systems-Radiation_Protection-Chipmunk 7 weeks ago	9m4 4 weeks	0 Configuration
1036	Clean up RMS installations wrightpa@ornl.gov	new 2 weeks ago	SNS-CNTRLS-Protection_Systems-Radiation_Protection-RMS3 2 weeks ago	9m4	0 Maintenance
1064	Revise Chipmunk OPM 18.6 wrightpa@ornl.gov	new 8 hours ago	SNS-CNTRLS-Protection_Systems-Radiation_Protection-Chipmunk 8 hours ago	9m4	0 Documentation

Don't refresh this page.

bar chart by Status

Find: size Match case

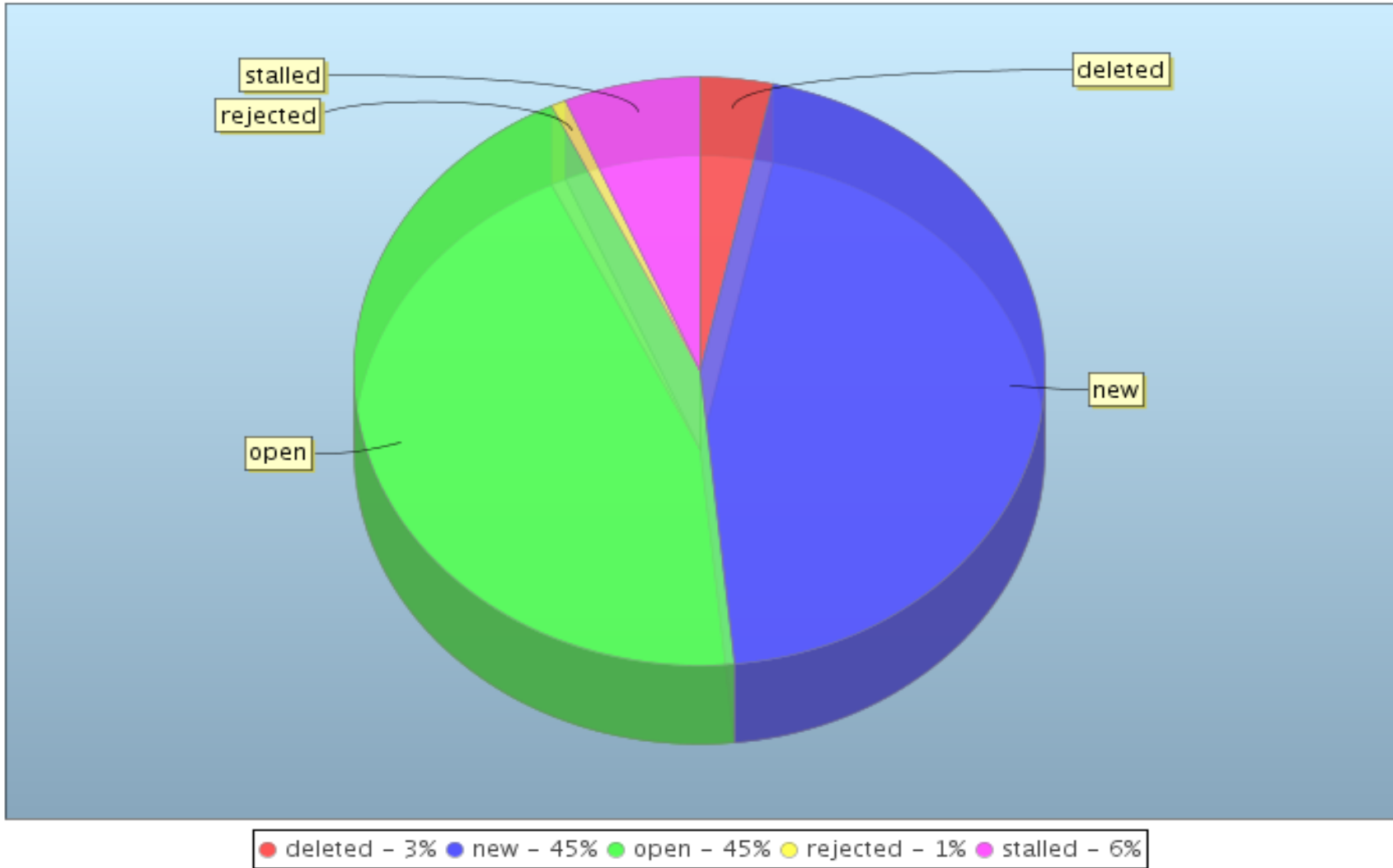
Done

Report – Tickets Resolved This Week

#	Id	Queue	Owner	Subject	Status	Last Update
1	1063	SNS-CNTRLS- Device_Control-Cooling- RCCS_&_QMCS	Danny R. Parrott Jr.	Configure DTL, CCL, and QMCS area resistivity transmitters for temperature compensation	resolved	2009-10-02 13:38:13
2	203	SNS-CNTRLS- Protection_Systems-APPS	Dennis Bryan Moss	Spare parts training for APPS equipment	resolved	2009-09-29 18:32:00
3	628	SNS-CNTRLS- Protection_Systems- Radiation_Protection- RMS3	Dennis Bryan Moss	Install RMS III in target cask cart room	resolved	2009-09-29 18:31:01
4	991	SNS-CNTRLS-Global- Computer-OPIs	Shaun N. Cooper	Target moderator OPI replacement	resolved	2009-09-30 14:07:31
5	829	SNS-CNTRLS- Device_Control-Cryogenics	Steven M. Hartman	Cryo controls maintenance tasks -- 2009 Summer	resolved	2009-09-28 15:54:20
6	356	SNS-CNTRLS- Device_Control-Cryogenics	Steven M. Hartman	Add new Cryo alarms	resolved	2009-09-28 15:53:07

Report – Tickets By Status

Ticket Status



Report - Summary of All Tickets

Status	Ticket Count ▼
Rejected	3
Deleted	15
Stalled	28
Open	196
New	198
Active (new, open, stalled)	422
Resolved	563
Total	1003

Status and Future Plans

- Using CRT since May 2009
- Over 1000 tickets entered
- Easy to use, has already been very useful
- We use a fraction of CPM features
- SNS uses a Work Order system built on DataStream to manage maintenance, repair and outage work on the machine
- We plan to develop CRT functions
 - To turn a ticket into a DataStream work order
 - To turn an e-log entry and turn it into a CRT ticket