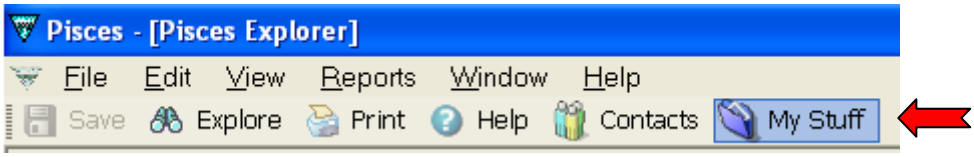
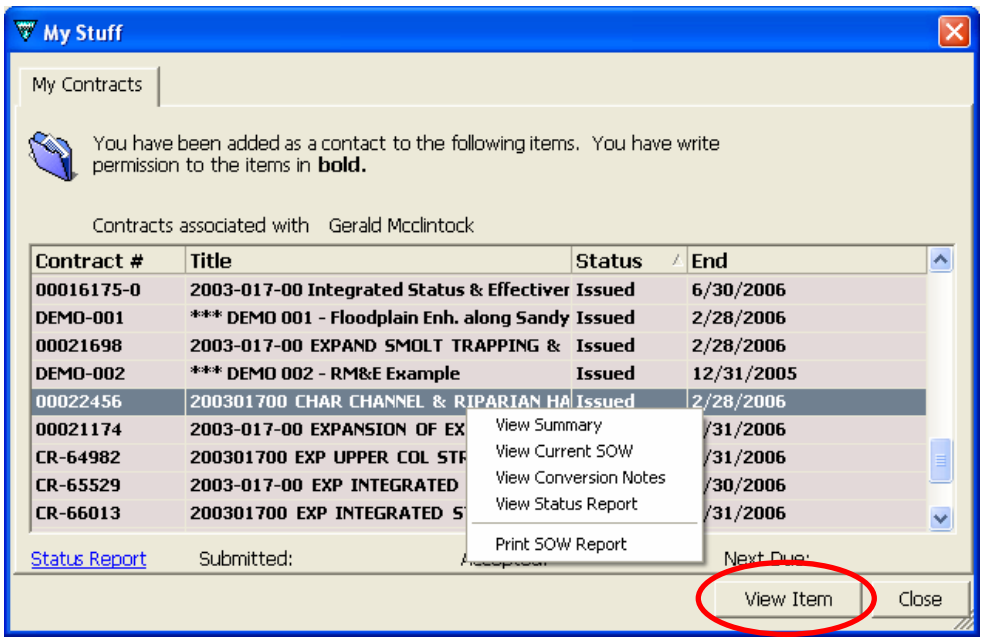
My Stuff



a. My Stuff provides instant access to information important to you.

b. Today, a tab with "My Contracts" shows all contracts where you're listed as a contact. Bold means you have write access to the contract in Pisces In the future additional tabs will be added for "Contracts", "Projects", etc.

c. Columns may be sorted, but there is no filter row.

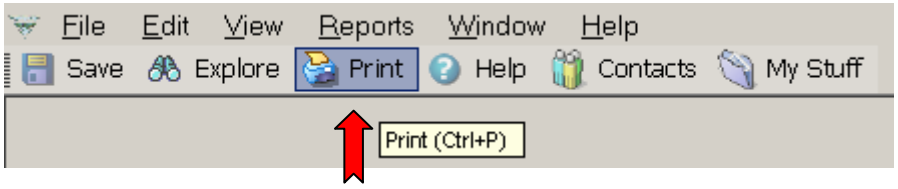


There are three ways to access details about a contract from this panel.

1. Right-click and select one of the context menu options;
2. Double-click any contract row; or
3. Click the "View Item" button.

Any of these actions will display the "Contract Details" panel.

Menu Now Has Labels Next to the Icons



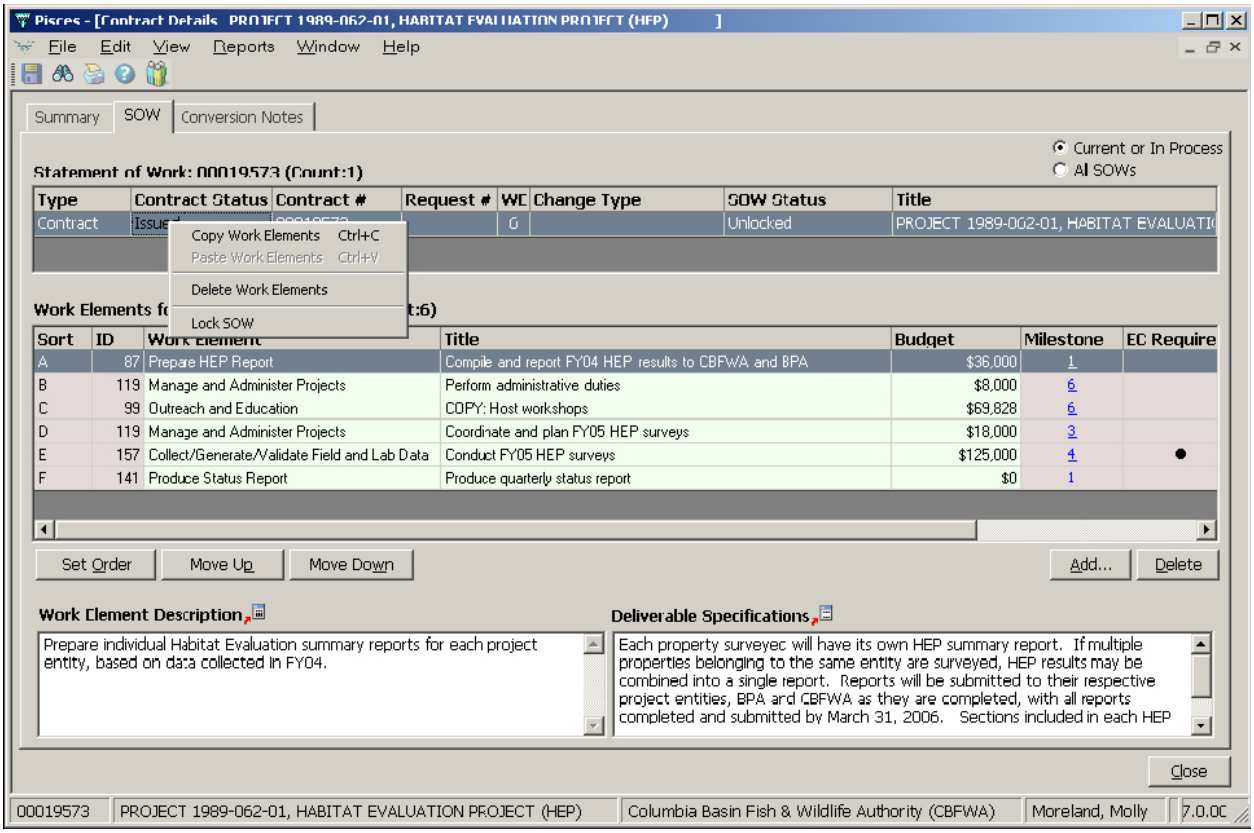
a. Each icon now has a text label to describe what the icon does or where it takes the user.

b. Tool-tips with keyboard shortcuts (CTRL+P, for example) also appear when a user hovers over an icon.

Copying Work Elements

a. This new function allows users to copy work elements from one SOW to another. Copying is supported at two levels. First, users can copy all the work elements in an SOW and later paste them to any other SOW in the system. Second, users can copy an individual work element.

b. To copy all work elements associated with an SOW, open the SOW tab and right-click the row (in the upper pane) that contains the contract whose work elements you want to copy. Choose “Copy Work Elements” from the drop-down menu. Then open the SOW tab of the contract you wish to copy the work elements to. Make sure you have selected the correct contract by left-clicking on the appropriate contract row in the upper pane. (The "Paste Work Elements" function will not work unless you have selected the contract by left-clicking on it.) Then right-click and choose “Paste Work Elements” from the drop-down menu.



c. To copy a single work element from one SOW to another, simply right-click in the row of the work element you want to copy, and choose “Copy Work Element” from the drop-down menu. Then open the SOW tab of the contract you wish to copy the work element to. Make sure you have selected the correct contract by left-clicking on the appropriate contract row in the upper pane. (The "Paste Work Element" function will not work unless you have selected the contract by left-clicking on it.) Then right-click and choose “Paste Work Element” from the drop-down menu.

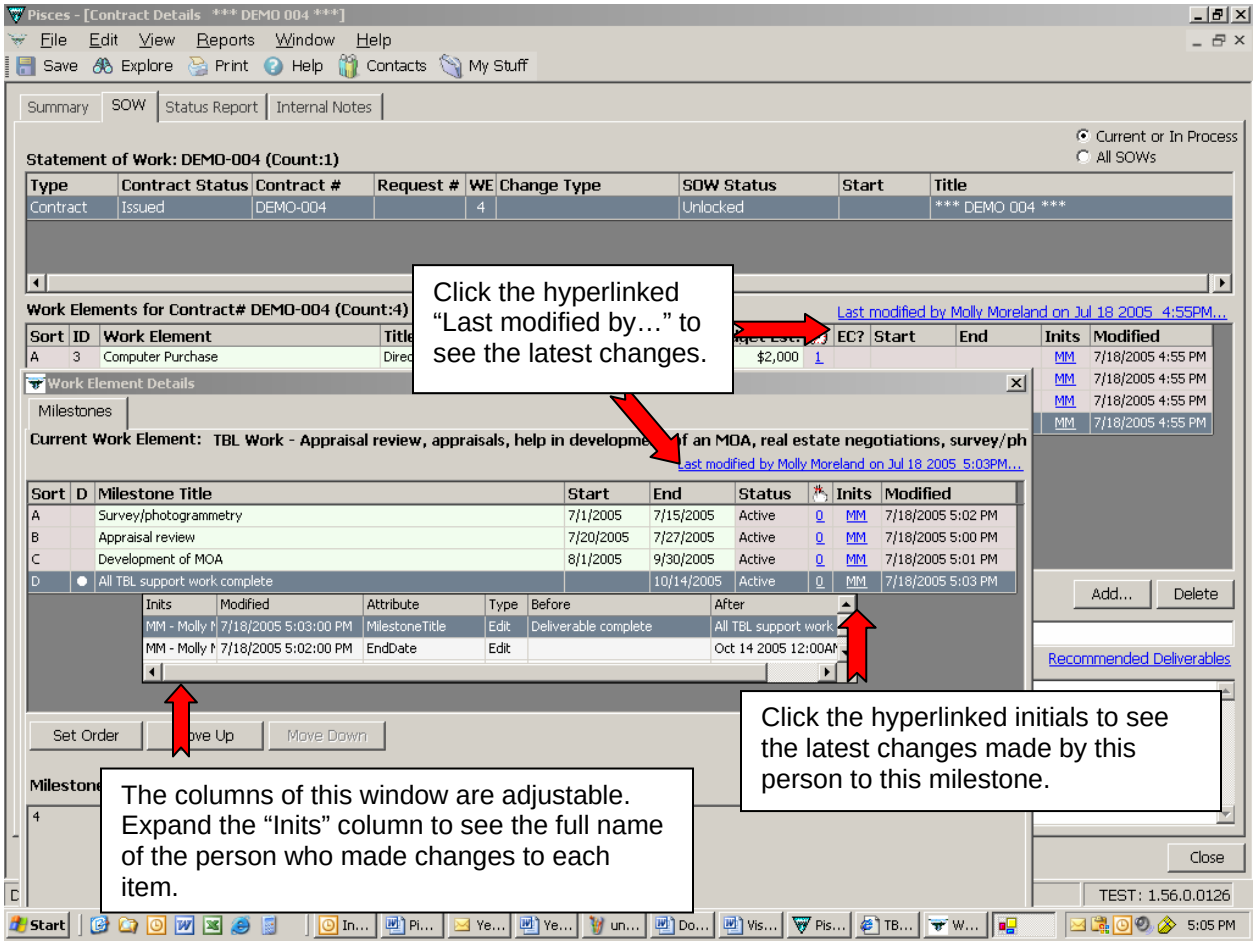
d. All the information underneath the work element such as milestones, specifications, budget, etc. will be copied along with each work element.

e. When you paste work elements, Pisces prepends the copied work elements with the word “COPY” in most fields so that you can easily distinguish the content you copied.

Activity Logging

a. This feature provides transparency to who's been editing what and when.

b. Whenever someone makes a change to a milestone, deliverable, date or budget, the change is marked with the person's initials, date and time of the change. When a user clicks the hyperlinked "Last modified by…" or initials text (MM in the example below), a window opens displaying the list of changes made by that person.



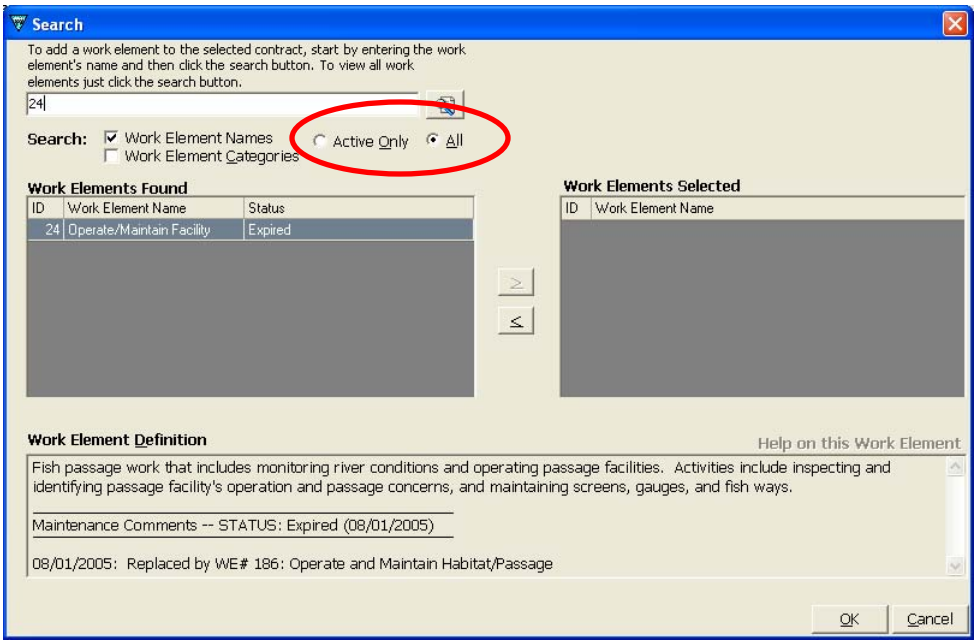
Changes to Work Elements

a. Additions or deletions to Work Elements will occur only once a year, around July 1.

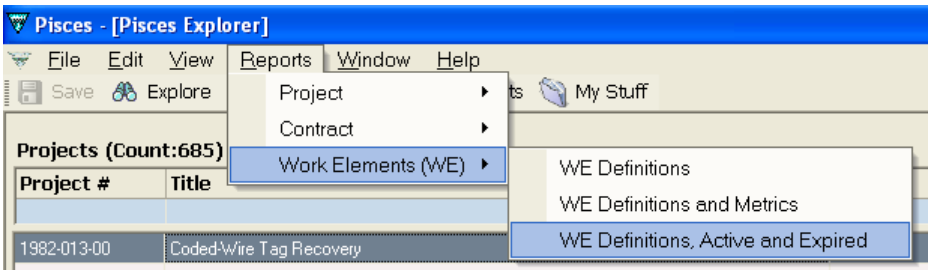
b. Updates or clarifications to Work Element titles or definitions may occur at any time.

c. If you copy a Statement of Work (SOW) that contains a Work Element that is no longer valid, Pisces will prepend the Work Element title with "Expired:", alerting you to the fact that the work element is no longer to be used.

d. Maintenance comments have been added to the Add Work Element dialog box. Typing in the expired Work Element name or number (be certain to check the box "**All**"), will display relevant information to the disposition of the expired Work Element. Occasionally, more than one alternative exists for the old Work Element. See: **Help Using Work Elements** below.



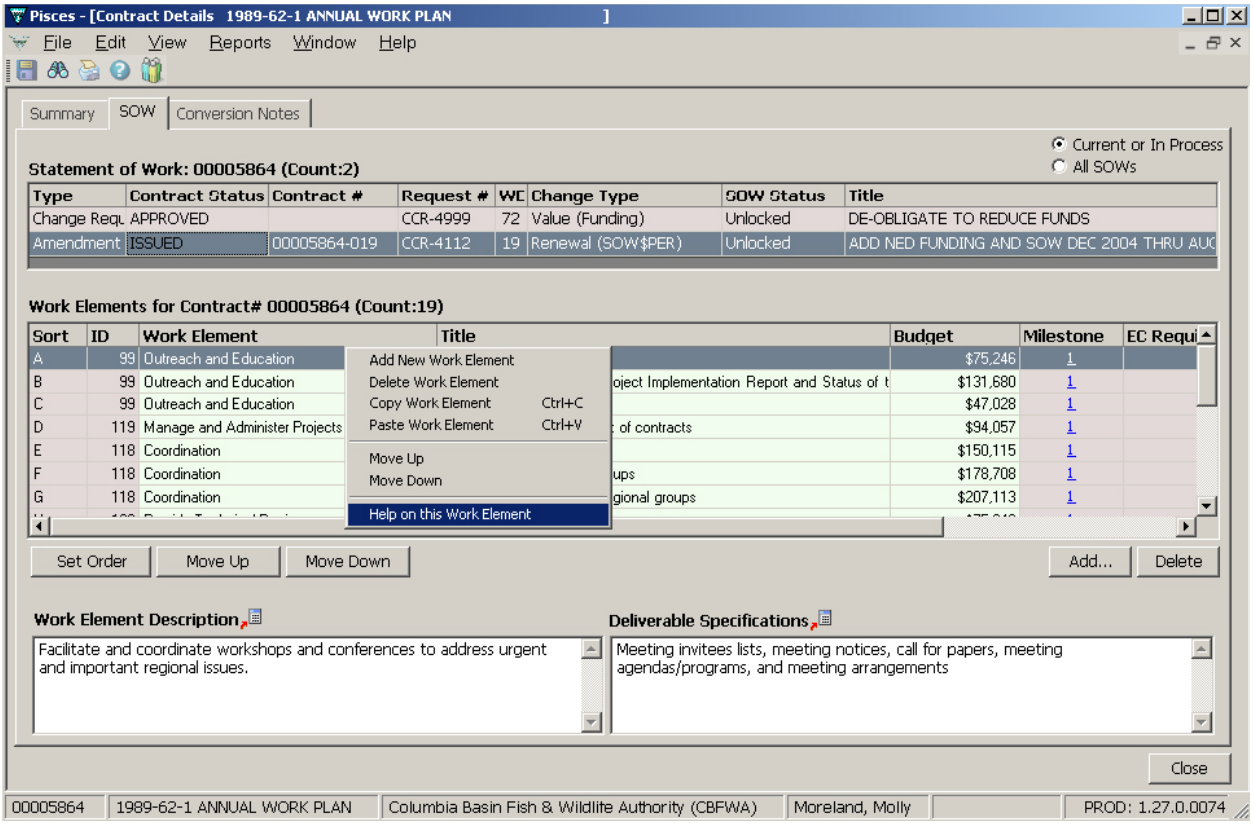
e. You can print a report from the Pisces main menu that shows all Work Elements, Active and Expired. This report is produced from the same database as the Add Work Element uses and is the most up-to-date source available.



Help Using Work Elements

a. Each work element has a background page that explains the rules, examples, and suggested milestones for using that work element.

b. To access the background page for a particular work element in Pisces, users may now right-click on that work element in an existing SOW and choose “Help on this Work Element” from the drop-down menu.



c. The link to each work element background page may also be found in the “Add Work Element” dialog box.

Milestone Help

a. When a user adds a new work element that requires Environmental Compliance, Pisces now automatically adds a milestone to that work element called “Environmental Compliance Requirements Complete.”

b. Pisces will also pre-populate the milestone description; however, the user will still need to enter the start and end dates of the milestone. Look for more of this type of milestone help in future releases.

Environmental Compliance (EC) Required

a. While the last release saw the addition of the “EC Required” column on the SOW report, that same information is now available in the list of work elements on the SOW tab. A dot in this new column “EC Required” indicates that some form of Environmental Compliance inquiry and documentation is likely required before work can proceed. Right-click on the work element and select “Help on this Work Element” for more details.

Improved Visibility of Deliverables

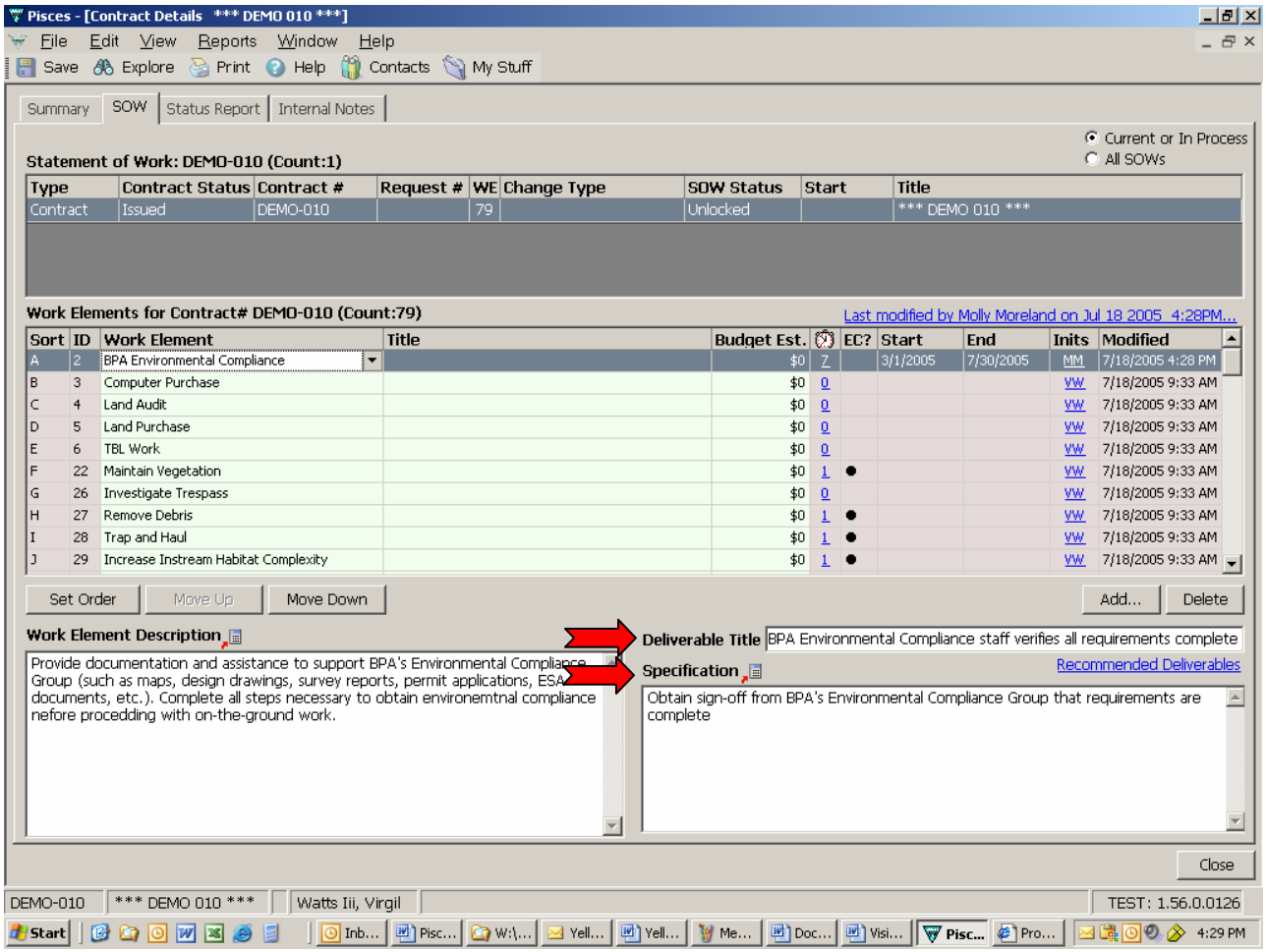
a. Before, deliverable specifications were entered in the Work Element Details (milestone) panel, just like any other milestone. The title “Deliverable complete” was not editable.

b. Now, deliverable titles and specifications appear on the same page as work elements.

c. When a user selects a work element, the deliverable for that work element appears in the Deliverable Title field at bottom right.

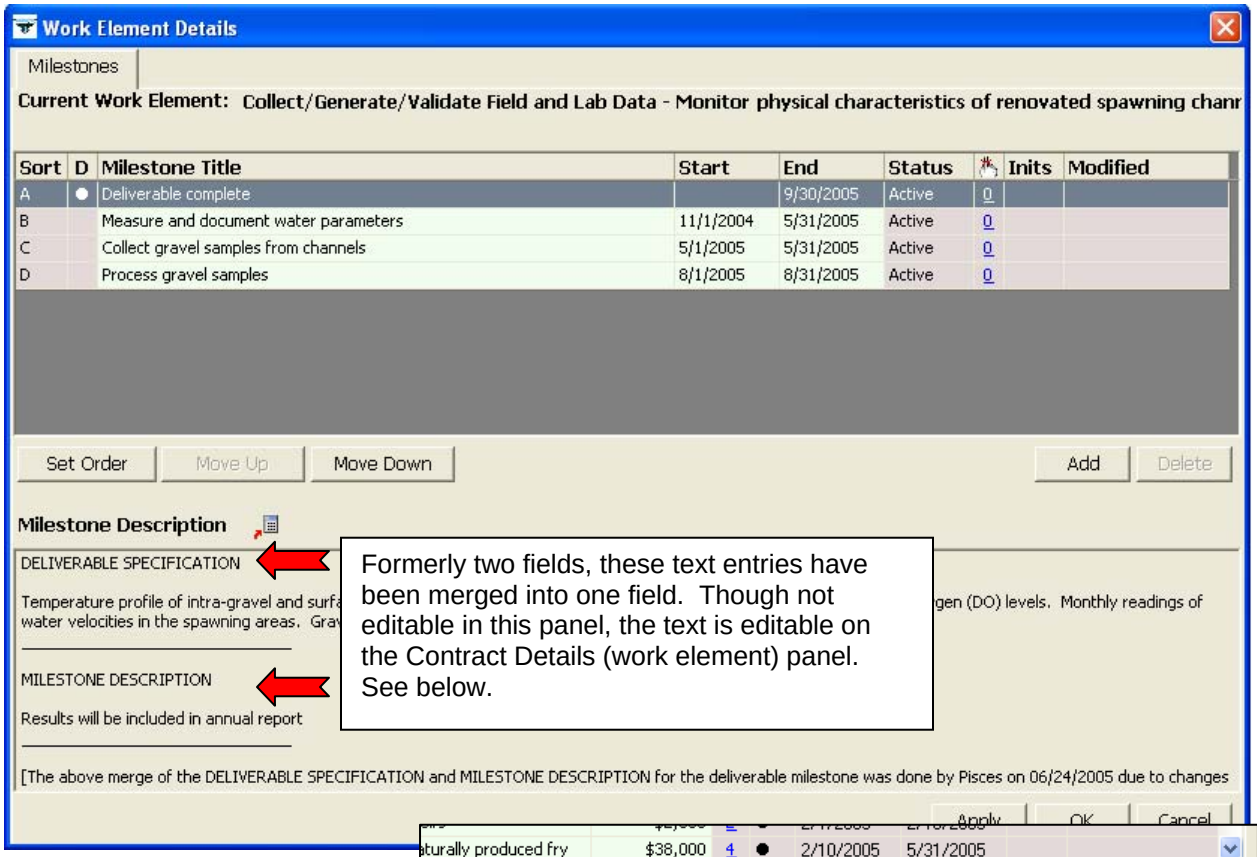
d. Details about the deliverable for each work element appear in the Specification field below the Deliverable Title.

e. The Deliverable Title is now editable. Both the title and deliverable specifications should be entered on the Contract Details panel, below.

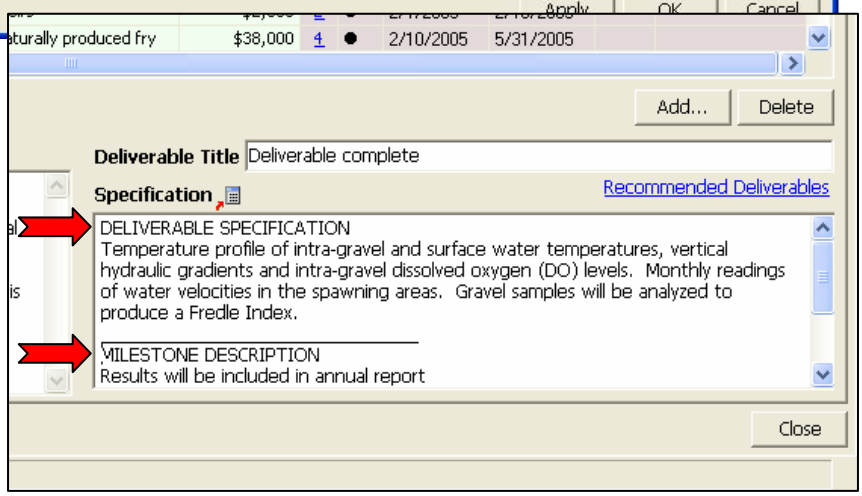


f. The fields formerly known as Deliverable Specifications and Milestone Description (for the deliverable, on the milestone panel) have now been merged into one field: Specification.
g. Any text entered in a Milestone Description field has been preserved. Any user who had entered text into both the Deliverable Specification and Milestone Description fields will now see both text entries when they open the Work Element Details (milestone) panel, along with a note from Pisces with the date of merge.
h. The Milestone Description field on the Work Element Details (milestone) panel is now uneditable (grayed out).

Visibility of Deliverables, Continued



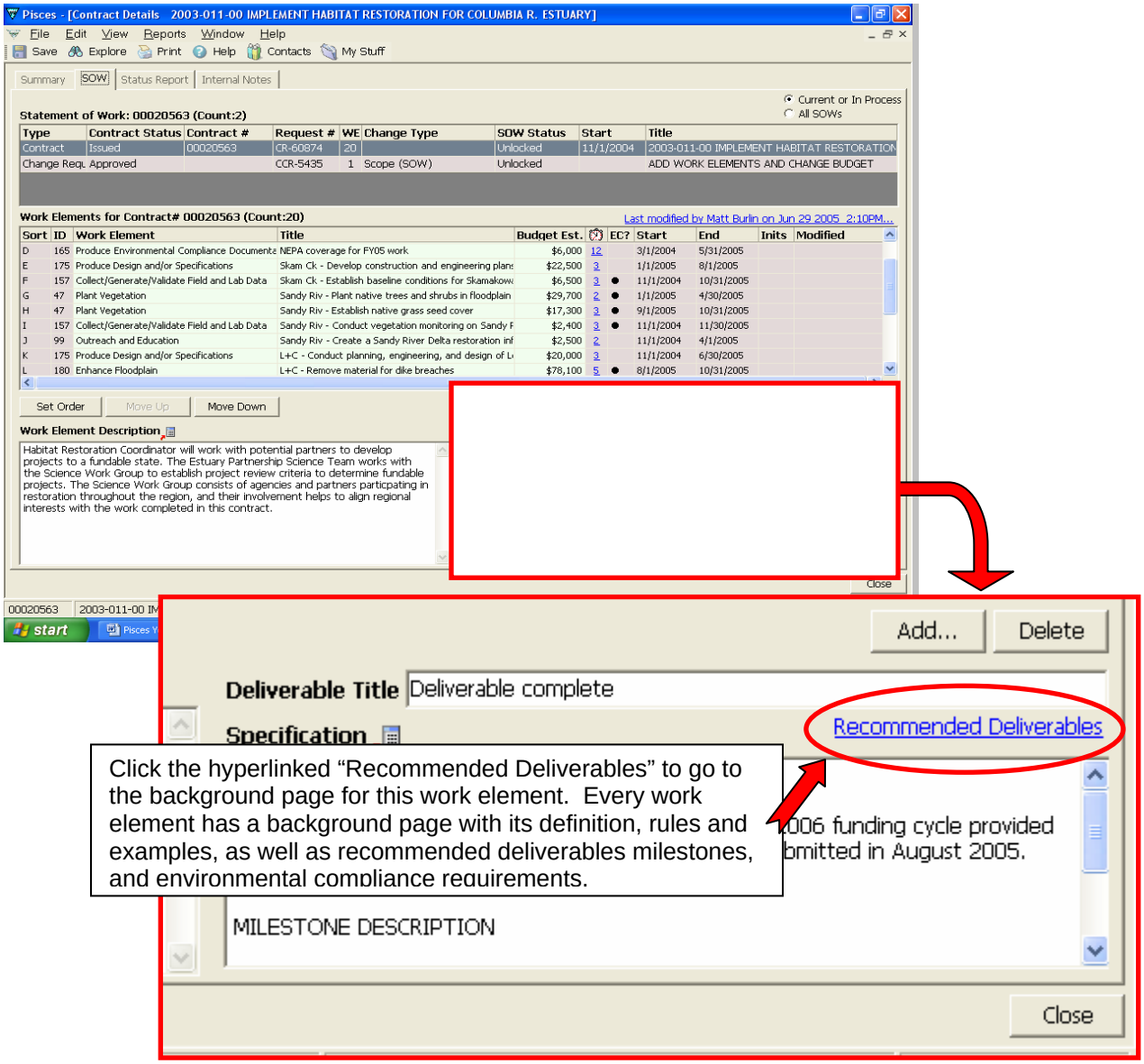
Formerly two fields, these text entries have been merged into one field. Though not editable in this panel, the text is editable on the Contract Details (work element) panel. See below.



Any text entries previously entered in the Deliverable Specification and Milestone Description fields appear here, in the Specification field of the Contract Details panel. This field is editable.

Help on Deliverables

a. There is now a link to work element background pages to help a user with suggestions for deliverables.



Sorting It Out

a. Users now have much finer control over the order in which work elements are listed in the SOW report.

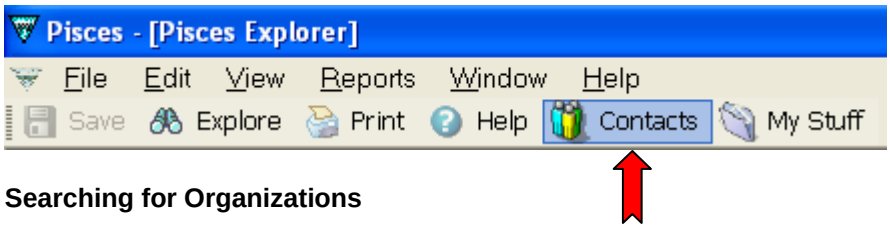
b. In addition to being able to move work elements up and down in your list, users can now sort by any column and then click "Set Order" to save the order exactly as it appears on the screen. This should save users from having to click "Move Up" and "Move Down" multiple times.

Milestone Sorting is Back

a. Users may now sort the order in which milestones appear on the screen and in the SOW report, just as with work elements.

b. After moving milestones up and down, users can then click "Set Order" to save the order exactly as it appears on the screen.

Contact Management



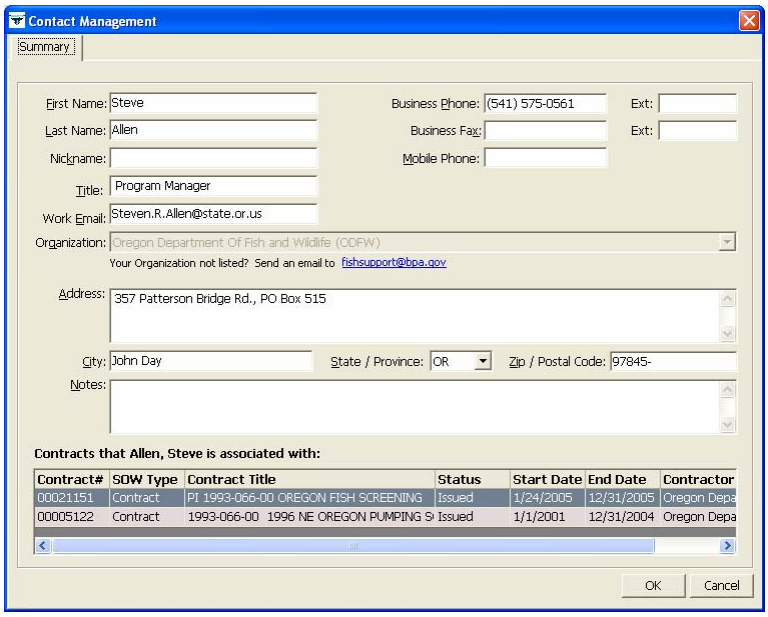
Searching for Organizations

When clicking the Contact Management button on the Pisces toolbar, users now have the choice to search for Contacts by name or by Organization.

Editing Contact Information

a. The Edit contact screen has been redesigned to make it easier to enter and edit information. There is a new "Nickname" field and a Notes field. Tip: use the Notes field to copy a contact's entire email signature and then copy/paste individual elements to their appropriate fields.

The bottom of the screen displays a list of all the contracts with which a user is associated – Pisces does this by looking for the user's name in the contacts list.



BPA Contacts

a. Pisces now automatically adds the contract's COTR and BPA Contracting Officer (CO) to the list of contacts.

b. These two contacts are special – the "Role" is not editable and they cannot be deleted. This ensures that the SOW report's list of contacts is accurate.

New Roles

The list of Roles available within the Contacts grid has changed. The new list is shorter and is different for projects and contracts. Any role assignment done in the past was mapped to a new role name. Here is the basic mapping:

New Pisces Role	Old Pisces Role
Administrative Contact	Administrative Contact or Fiscal Contact
Contract Manager (Contract level only)	Authorizing Manager, Principal Investigator, Proposal Contact, or Project Manager
Project Lead (Project level only)	Authorizing Manager, Principal Investigator, Proposal Contact, or Project Manager
Technical Contact	Technical Contact

And here are the Role Definitions:

Role Name	Role Definition
Contracting Officer	The BPA Contracting Officer; person responsible for legally and financially committing BPA to the contract. This field is inherited from BPA's BES system and is therefore not editable in Pisces.
COTR	The BPA Contracting Officer's Technical Representative; person responsible for overseeing the technical aspects of the Statement of Work (SOW). This field is inherited from BPA's BES system and is therefore not editable in Pisces.
Env. Compliance Lead	The BPA Environmental Compliance Lead responsible for reviewing Statements of Work for compliance with NEPA and other requirements.
Administrative Contact	Contractor (or subcontractor) involved in invoicing, accounting, contracting or other administrative capacity.
Technical Contact	Contractor (or subcontractor) directly involved with on-the-ground, scientific, or other technical components of the work.
Contract Manager	Contractor (or subcontractor) who does a combination of the technical and administrative work. This was formerly called project manager or project lead. The term has been changed to clarify that this role is at the contract level and to distinguish it from the BPA project manager.
Supervisor	Someone who supervises any or all of the following: Administrative, Technical, Contract Manager.
Interested Party	Someone who is not involved contractually with the work, but who is interested in or related to the work. This could include landowners, cost-share partners, or research collaborators.
Project Manager	The BPA project manager assigned the overall responsibility for the project (may be different than the COTR). This field is inherited from BPA's BES system and is therefore not editable in Pisces.
Project Lead	Someone (non-BPA) with overall responsibilities for the project. Often the original sponsor, this is someone who gets involved in budgeting at the project level and stays with the project as it moves through different phases of implementation.

Additional Edit Contact notes:

- Since a user's email address (and thus their Pisces account) must be tied to their organization for security purposes, users can no longer change a contact's organization. If the organization is wrong, send an email to fishsupport@bpa.gov.
- People within the same organization can edit any contact within their organization, but not contacts from other organizations.
- When users enter their first and last names, Pisces now checks for the same first and last name in the system. If Pisces finds a match, it will notify the user, but still allow the user to save that information (there very well might be two "Jack Johnson" contacts in the system).
- While an email address is not required, if a user enters an email address, it must be unique across all contacts in the system, and be in the format of "name@domain.ext."

Status Reporting

a. Contractors may now complete and submit status reports online, using a simple form automatically generated by Pisces, based on milestones and deliverable established in the SOW.

b. Pisces enables contractors to mark deliverables and milestones as complete, to report status for deliverables and milestones that are not yet complete, and to provide comments. BPA COTRs add their own comments when accepting submitted status reports.

c. Pisces status report views and permissions are user-sensitive. Depending on who you are, you'll have different access and visibility to status reports. For example, contractors may only view status reports for contracts where they are added as a contact, and can only edit status reports for contracts where they have been given explicit write access by their COTR. COTRs and BPA staff may see any submitted status reports. All others – e.g. contractors not affiliated with a contract – will not see the Status Report tab at all.

d. In order to activate the online status reporting functionality, BPA COTRs will add the Produce Pisces Status Report work element to each active SOW.

e. Detailed instructions and pictures of status reporting functionality are posted at http://www.efw.bpa.gov/contractors/reporting.aspx.

Notifications & Reminders

a. Pisces will automatically generate two kinds of email messages to help keep COTRs and contractors apprised of contract-related events and requirements. These are notifications and reminders.

b. Notifications are based on events, for example: Status Report Submitted, Status Report Accepted, Deliverable Marked Complete.

c. Reminders are based on the passing of time, for example: Milestone due in 10 days, Milestone due today, Late Milestone – due 5 days ago. Reminders are always set at the Milestone level.

d. Reminders and notifications will be set up by the BPA COTR; however, contractors may also set up their own reminders and notifications.

e. Detailed instructions and pictures of reminders and notifications functionality are posted at http://www.efw.bpa.gov/contractors/reporting.aspx.

Validation of SOWs within Pisces

There will be two flavors of rules: “Must” and “Should” haves. Therefore, the SOW Validation report will be segmented into two main parts:

- Must = “Problems that need to be resolved”
- Should = “Potential issues you should take a look at”

Work Element Rules

- Must have a Title
- Must have at least one milestone.
- Must have a Work Element Description.
- Must have a Deliverable Title and Specification for work elements with metrics.
- Must have a Deliverable Specification if there is a Deliverable Title.
- Must have a Deliverable Title if there is a Deliverable Specification.
- Must have a WE#185 (“Pisces Status Report”) and it must have one or more status report milestones within the performance period of the SOW.
- Must have a WE#119 (“Manage and Admin. Projects”)
- Should have a non-zero Budget Estimate.
- Should have a Deliverable Title and Specification for work elements without metrics.
- Should have WE#132 (“Produce Annual Report”)
- Should have a WE#165 (“Produce Env. Comp. Documentation”) whenever an SOW includes a WE that requires EC.

Milestone Rules

- Must have a Title.
- Must have a Start and End date for non-Deliverable milestones.
- Must have an End date for Deliverable milestones.
- Must have Start and End dates that fall within the contract’s performance period.
- Should have a Milestone Description
- Should have at least one reminder set for status report milestones.

Other Rules

- Must have a Contract Description.
- Must have a Performance Period Start and End date
- *Note*: We are adding Performance Period “Start” and “End” date columns to the SOW History grid at the top of the SOW tab, thus making the Performance Period more visible (and not just buried in the Status Report Wizard).
- Must have at least one Project contact from an organization other than BPA.
- Must have at least one Contract contact from an organization other than BPA.
- Must have an Environmental Compliance contact if the SOW contains one or more WEs requiring EC.
- Must have “Role” set for each Project and Contract contact.
- Should have notifications set for at least one event (any event). For example, Status Report Submitted or Status Report Accepted.