

Release Notes for Pisces version 1.27

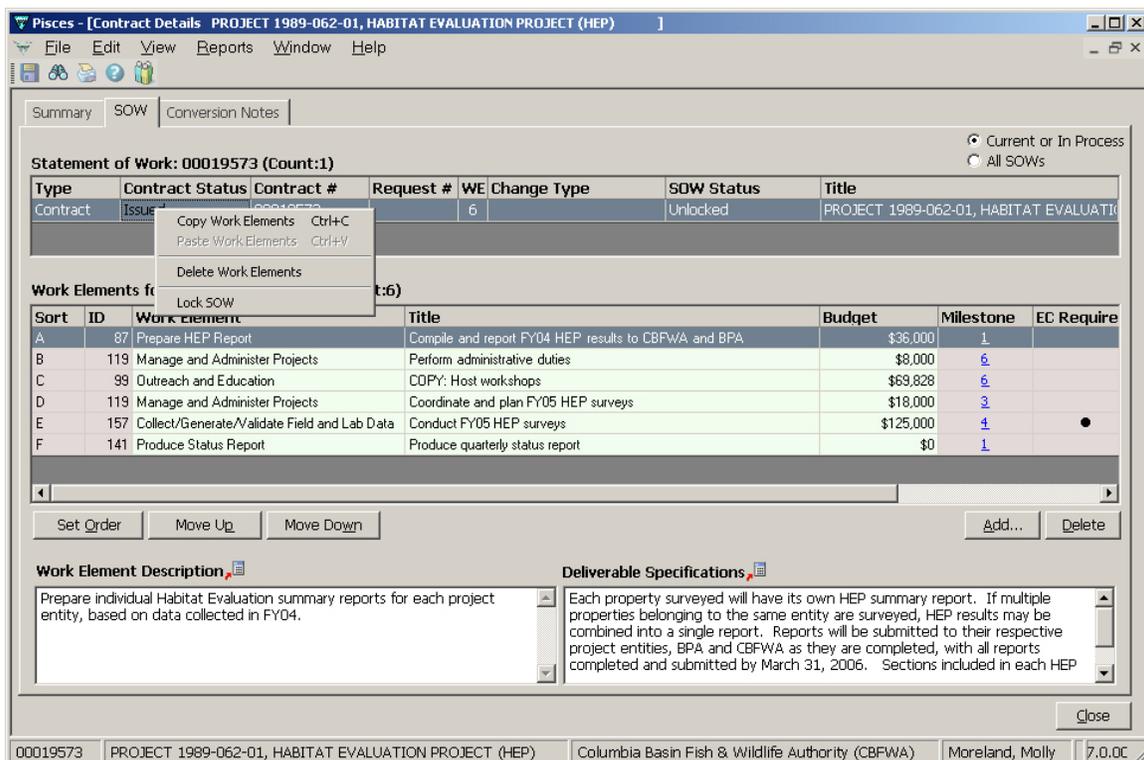
Release Date: **May 10, 2005**

The Fish & Wildlife Process Improvement Team is pleased to announce the latest release of Pisces, version 1.27. This release of Pisces contains new features that will accelerate the preparation of FY06 Statements of Work (SOWs): contractors and their BPA project managers can quickly and easily copy the work elements, milestones, and specifications they entered into Pisces for their FY05 SOWs over to any new SOW. Also included in this version are contact management tools that will support communication between all parties with roles in project implementation.

Enhancements in Pisces version 1.27 include:

Copying Work Elements

- 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.
- 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, right-click the desired contract row (in the upper pane), and choose “Paste Work Elements” from the drop-down menu.



- 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 you want to copy the work element to, right-click in the work element window, and choose “Paste Work Element” to paste the copied work element in the SOW.

- 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.

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.

The screenshot displays the Pisces software interface for Contract# 00005864. The main window shows the 'Statement of Work' and 'Work Elements' for this contract. The 'Work Elements' table is as follows:

| Sort | ID | Work Element | Title | Budget | Milestone | EC Requi |
|------|-----|--------------------------------|---------------------------|-----------|-----------|----------|
| A | 99 | Outreach and Education | Add New Work Element | \$75,246 | 1 | |
| B | 99 | Outreach and Education | Delete Work Element | \$131,680 | 1 | |
| C | 99 | Outreach and Education | Copy Work Element Ctrl+C | \$47,028 | 1 | |
| D | 119 | Manage and Administer Projects | Paste Work Element Ctrl+V | \$94,057 | 1 | |
| E | 118 | Coordination | Move Up | \$150,115 | 1 | |
| F | 118 | Coordination | Move Down | \$178,708 | 1 | |
| G | 118 | Coordination | Help on this Work Element | \$207,113 | 1 | |

Below the table, there are buttons for 'Set Order', 'Move Up', 'Move Down', 'Add...', and 'Delete'. The 'Work Element Description' and 'Deliverable Specifications' sections are also visible.

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

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.

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.
- b. 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.

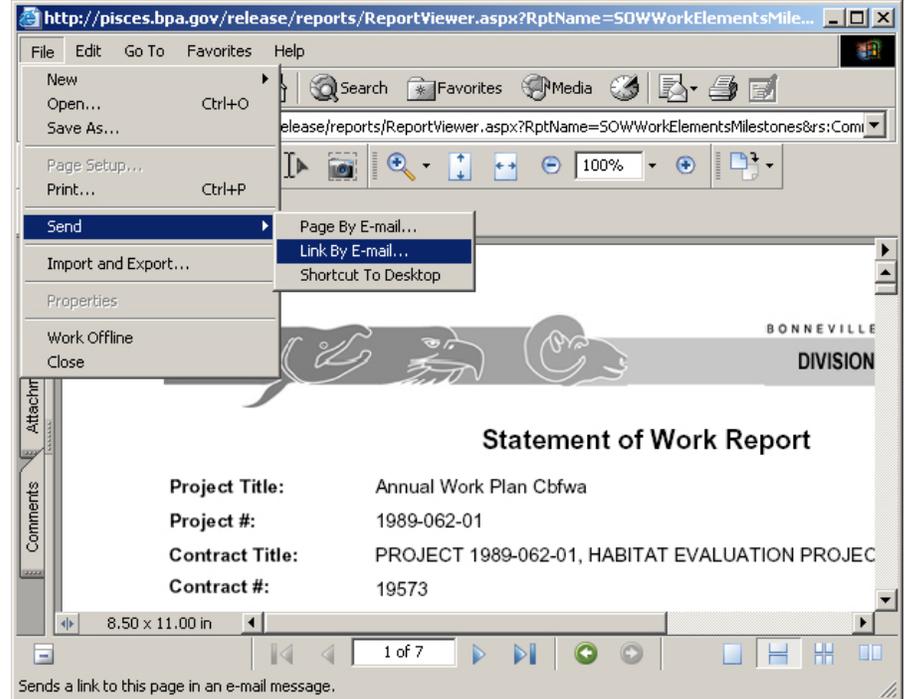
Milestone Help

- 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.

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SOW Report Improvements

- The first page of the SOW report is now more streamlined. A slightly different set of fields appears depending on the kind of SOW and its status (CR, Contract, CCR, or Amendment; Pending, Issued, etc.)
- To send a link to the SOW report via email, go to the SOW tab of the desired contract, and “print” the SOW using the print icon. Result: a PDF file opens in a browser. Choose “Send...Link by E-Mail” from the File menu. An email dialogue box will open, allowing you to send the link to the SOW report in an email message.



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.

BPA Contacts

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

| <u>New Pisces Role</u> | <u>Old Pisces Role</u> |
|---|---|
| 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:

| <u>Role Name</u> | <u>Role Definition</u> |
|-------------------------|---|
| 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. |

Editing Contact Information

- 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. This list is a quick way to get a list of all of your contracts without having to enter filters in the Pisces Explorer. In the next release, this list will be easier to get to (you won’t have to go into Edit Contact).

Contact Management

Summary

First Name: Benjamin Business Phone: (503) 230-4737 Ext:

Last Name: Zelinsky Business Fax: Ext:

Nickname: Bucky Mobile Phone:

Title: Fish And Wildlife Project Manager

Work Email: bdzelinsky@bpa.gov

Organization: Bonneville Power Administration
 Your Organization not listed? Send an email to fishsupport@bpa.gov

Address: P.O. Box 3621 Mailstop - Portland, OR 97208-3621

City: Portland State / Province: OR Zip / Postal Code: 97208-3621

Notes:

Contracts that Zelinsky, Benjamin is associated with:

| Contract# | SOW Type | Contract Title | Status | Start Date | End Date | Contract |
|-------------|----------|---|--------|------------|-----------|-------------|
| 00000422-00 | Contract | 1996-011-02 GARDEN CITY/LOWDEN 2 FIS | Closed | 9/10/2001 | 6/30/2003 | Montgome |
| 00000422-00 | Contract | 1996-011-00 GARDEN CITY CONSTRUCTION | Closed | 11/15/2001 | 2/28/2003 | Montgome |
| 00014887 | Contract | 1996-011-00 WALL & WALL & TRIVENTRE AND | Closed | 8/15/2003 | 9/30/2003 | City Of Mil |

OK Cancel

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.”

Fixed Bugs

- When you close a window that has information that is not saved, Pisces prompts you to save. In some situations in the past, even if you clicked “Yes,” Pisces didn’t actually save the information. This is now fixed.
- Work Element counts in the Explorer and on the SOW tab are now accurate.
- Various bugs affecting sorting of work elements and milestones are now fixed.

- Milestone date verification is now more accurate (In some cases, Pisces thought that “1/31/2006” was before “11/30/2005”.)
- Various data quality improvements.
- Tooltips are back for most of the column headings in the application.

End of Pisces v1.27 release notes