

Release Notes for Pisces version 1.66

Release Date: **March 21, 2006**

The Fish & Wildlife Process Improvement Team is pleased to announce the latest release of Pisces: version 1.66. Building on the previous release, when we began to capture location and metrics data in Pisces, contractors are now able to indicate the “focal species” (primary species benefited by a project/contract action) for each applicable work element (as well as any secondary species benefited), and update their work element budgets throughout the year, as actual costs become more known. These additions to our existing suite of data in Pisces deliver broader and more sophisticated reporting capabilities for the Fish and Wildlife Program.

Pisces is a web-enabled software application aimed at helping BPA and its Fish & Wildlife program participants track and manage projects throughout the Columbia River Basin. Pisces allows contractors and BPA project managers to collaborate on project definition and ongoing project management over the internet.

New features in Pisces version 1.66 include:

1. Easy Access to Location, Metrics, and Focal Species Functionality

- a. You can now access Milestone, Location, Metrics, and Focal Species information directly from the Contract Details window. Simply right-click on the work element and select the destination you'd like. Alternatively, you can select a work element and then click the Details... button.
- b. From the Work Element Details window, you can use the new dropdown list at the top of the window. Selecting another work element loads the Milestones, Location, Metrics, and Focal Species for that work element. (No more going back to the Contract Details window to select another work element!)

2. Visual Cues to Prompt the User When Focal Species Data are Required

- a. On the Contract Details window, there is a new column (**F**) to indicate whether a focal species designation is required for each work element. As with environmental compliance review (column heading **EC?**), metrics (column heading **M**) and location (column heading **L**), a bullet (●) in the (**F**) column indicates that data must be entered for the selected work element.
- b. There are also visual cues in the Work Element Details window. If focal species data must be entered for the selected work element, an asterisk (*) will appear next to the text on the corresponding tab. Likewise, if you're on the Focal Species tab, Pisces will display an asterisk next to the work elements in the dropdown menu that require focal species data.
- c. Whether you like to focus on one work element and enter all its attributes, or focus on one attribute (such as focal species) and enter all the data for all work elements, these visual indicators should help make your data entry more efficient.

3. Focal Species Data Entry

- a. You can enter focal species designations from the newly expanded Work Element Details window.
- b. Users can choose primary and secondary focal species from a drop-down list for all applicable work elements, though only a primary focal species designation is required. [NOTE: not all work elements require focal species data. For example, focal species are not applicable to work elements like “Manage and Administer Projects” or “Produce Pisces Status Report,” among others.]
- c. For existing contracts, contractors will enter focal species data (for completed work elements that require them) when submitting their next status report. For most users, this means the Jan-Mar 2006 status report which is due April 15.
- d. Pisces will now prompt users with a “guide” when submitting status reports to help them understand where they are missing necessary data, such as focal species, metrics, location, and updated work element budgets.

- e. For all new contracts beginning March 21, 2006 or later, contractors will designate focal species for those work elements that require them prior to the submission of a Statement of Work (SOW).
- f. Already submitted your SOW? Not to worry: Pisces will prompt you to enter focal species data when you submit your first status report.
- g. Resources:
 - [List of focal species](#)
 - [Background information on focal species](#)

Both of these reports can be found at <http://www.efw.bpa.gov/contractors/focalspecies.aspx>.

4. Updated Work Element Budgets

- a. Work element budget estimates have been moved from the Contract Details window to their own tab, which is easily accessible at the top of the Contract Details window. This frees up valuable real estate for other contract information, and allows for several new work element budget features: updating, totaling, comparison, and prompts for updating budgets for completed work elements.
- b. Updating: Contractors can now update their work element budgets throughout the year. When work element budgets are entered at the beginning of the contract performance period, they are usually best guesses. However, as contract work progresses, contractors know more about what will actually be spent for each work element. The updating function allows contractors to provide revised work element budgets to reflect realities like rising or falling materials prices, shifts in tasks or schedule, etc.
- c. Totaling and Comparison: The Pisces team is pleased to deliver this long-requested function. Pisces now totals work element budgets and compares these to the budget for the contract performance period (which comes out of BPA's financial database, BES).
- d. Visual reminder for completed work elements: When all of the milestones and deliverables associated with a work element are complete, Pisces will display the date of completion in the Completed column next to the work element in the WE Budgets tab. Pisces will also prompt the user to enter a final updated work element budget estimate in the next status report.
- e. Pisces also provides a "Contractor Comments" and "COTR Comments" field for each work element budget estimate, though comments are optional.
- f. When a contract has both an Issued SOW Revision (e.g. on the original contract) and a Pending SOW Revision (e.g. a No Cost Time Extension amendment), Pisces will allow the contractor or the COTR to provide Updated Budgets and Comments on the Issued SOW Revision, but only Planned Budgets on the Pending SOW Revision.
- g. When contract is Complete, the contractor or the COTR (as well as BPA Manager) can still edit the Updated Budgets/Comments.
- h. When contract is Closed, the contractor can no longer edit the Updated Budgets/Comments; however, the COTR (or BPA Manager) can.
- i. Need help? From the Work Element Budgets tab, there's a link to [guidance on preparing work element budgets](#). You can also get to this guidance from BPA's "Information for Contractors" website: <http://www.efw.bpa.gov/contractors/workelementbudgets.aspx>.

5. Work Completion Guide

- a. A new "Completion Guide" has been created to help ensure all required information – metrics, location, focal species, and work element budgets - has been entered before contractors submit a status report. For more information see the training materials: <http://www.efw.bpa.gov/contractors/CompletionGuide.pdf>
- b. Users can proactively display the guide at any point while working in a status report to see where they still need to enter data by checking the "Show Guide" toggle. The guide will display a green checkmark if information has already been entered. For those work elements still requiring information, a hyperlink will appear that when clicked will take the user to the specific area in Pisces where the additional information can be entered. (If a section does not appear, this is an indication that no *completed* work

elements for this performance period required additional information.)

- c. Since focal species functionality is new to the current release (see the [Focal Species training materials](http://www.efw.bpa.gov/contractors/FocalSpeciesTrainingMaterials.pdf) at <http://www.efw.bpa.gov/contractors/FocalSpeciesTrainingMaterials.pdf> for more specifics), the work completion guide will display all completed work elements requiring focal species designations, irrespective in which status report period they were completed.
- d. For work element budgets, the hyperlink in the guide will direct the user to the new WE Budgets tab. See the new [WE Budget training materials](http://www.efw.bpa.gov/contractors/WEBudgetsTrainingMaterials.pdf) at <http://www.efw.bpa.gov/contractors/WEBudgetsTrainingMaterials.pdf> for more information.
- e. The guide has a Refresh button -- to update the information in the guide after entering new data -- and a Close button, which allows the user to exit the guide even after leaving the Status Report tab. Alternatively, while still on the Status Report tab, the user can *uncheck* the “Show Guide” toggle. Clicking the Refresh button will also automatically save the status report.

6. Status Reporting Improvements

- a. To improve collaboration on status reports, COTRs can now view (though not edit) a “Draft” status report. Previously Pisces only allowed the COTR to see the blank status report, and hid all information that the contractor entered prior to submitting the report.
- b. A Reset button has been added to the status report screen to allow either the contractor or the COTR can clear the current status report.
- c. If a status report is in draft and an amendment is in process, clicking the Reset button will ensure the status report is pointing to the most current amendment/SOW. A word of caution: accepting the Reset will clear the current status report of all entries, so be sure to print anything you don’t want to lose.
- d. Status Report Milestone (SRM) labels will be more accurate. For example, the contract that goes from 3/16/05 – 3/15/06 will no longer have a first status report labeled “Apr-Jun 05” but rather will be labeled “Mar-Jun 05”. Or, the contract that goes from 2/25/05 – 2/24/06 will no longer have a first status report labeled “Jan-Mar 05” but rather will be labeled “Feb-Mar 05”.
- e. No more multiple “Final” status reports: When you do a No Cost Time Extension (NCTE) amendment, Pisces will rename the old “Final” status report appropriately, including updating its due date, and ensure there is ever only one “Final.”
- f. Fewer status reports: Pisces will be smarter about when to “merge” status reports that are very close to one another due to contracts that start and end on “odd” dates. For example, the contract that goes from 4/21/05 – 4/20/06 will no longer have a “Jan-Mar 06” report due 4/15/05 and a “Final” report due 4/20/06, but rather one “Final” report due 4/20/06 that covers 1/1/06 – 4/20/06. Part of this improvement includes a series of settings that define the shortest reporting period for which Pisces will create a status report. These settings can be adjusted if/when the need arises.
- g. Upon submission of a status report, Pisces will make two (2) checks (this will soon be consolidated into one). First, the status report will be validated against the “Status Report Validation” rules (click [here](http://www.efw.bpa.gov/contractors/StatusReportValidationRules.pdf) for more information or see <http://www.efw.bpa.gov/contractors/StatusReportValidationRules.pdf>). Second, Pisces will check to ensure all data requirements for completed work elements have been met.

7. Other Improvements

- a. Pisces will now support amendments that shorten the contract’s performance period.
- b. Milestone states have changed a little due to new data model efficiencies. The four possible states are: Inactive, Active, Canceled, and Completed. The “Inactive” state replaces three previous states: “Draft”, “Pending”, and “Closed”. Also, the steps to Cancel a milestone are slightly streamlined: simply right click on a milestone (in the Milestones tab) and select “Cancel Milestone.” Once canceled, BPA users can now “un-cancel” a milestone by right clicking on the milestone and selecting “Restore Milestone Status”. [NOTE: as before, these right click options are only available to the COTR of record, a BPA Manager, or SOW Admin.]
- c. There is a new “Project Status Report” link on the Project Details window’s Summary tab. This link will generate a report that displays key information about a project, such as metrics, work elements budgets, progress on deliverables, etc. [NOTE: this feature will be operational in April 2006.]

- d. There is a new “Summary” text field (limited to 500 characters) on the Project Details window’s Summary tab where project sponsors can enter information such as background and history to describe what their project is about.
- e. A “Value” column has been added to the Contract Actions grid at the top of the SOW tab. This will display the monies added or subtracted from the Contract Value.
- f. WE 185 (Produce Pisces Status Reports) now acts just like any other work element: no more repeated work element letters, no SOWs that have only one work element, etc.
- g. New validation rules have been added to the SOW Validation report:
 - Must have focal species designated if a work element requires it.
 - On a new contract (CR), the Total WE Budget must equal the Performance Period Budget.
 - Every work element must have a value in the Planned Work Element Budget field (\$0 budget values are okay). This rule fires only on pre-issued contracts.
 - Statements of Work must not include the phrase, “COPY:” in any field, or the phrase “Deliverable Complete” in the Deliverable Title field.
 - Must have a non-blank “Project Summary” field on the Project Details’ Summary tab.

Fixed Bugs and Enhancements

- Incorrect sort order: A, AA, B, C, of work elements and milestones within Pisces has been fixed (bug 329)
- SOW Report should load faster (bug 533) – in our testing, a 51 page report displayed in less than 15 seconds.
- Accidental mouse wheel scrolling will no longer cause the Status Report dropdown menu to cycle (bug 649)
- Milestone date change flag (italicized text) sticky after pasting to new contract (bug 735)
- In Contract Explorer, the Amd column’s CCR count now includes Review & Approved CCRs as well as Pending CCRs (bug 891).
- The Metrics tab now has additional information in the intro text to explain how the checkboxes work (enh 927).
- A tooltip has been added for "Planned" metrics column to explain that the column is disabled for everyone (enh 928). (Planned metric functionality will be available in a later release.)
- The word “optional” has been added to the Comment column headings on the Metrics tab (enh 929).
- Users can now copy a work element, delete it (mark for deletion and save), and then paste it (bug 936).
- Reported metrics are now in the same sort order as in the rest of Pisces (bug 957).
- The WE (work element) number now appears in the Statement of Work Report (enh 963).
- Pisces now allows carriage returns to be saved with Milestone Titles (bug 1022).
- Deliverable (Milestone) Title text with carriage returns will no longer get cropped (bug 1023).
- Changes to Contact Role will now be saved when users answer “Yes” to save-changes prompt (bug 1099).
- The View Item function on the first record in the My Stuff dialog should work now. In some cases, the My Stuff dialog closed when trying to view this record (bug 1123).
- Selecting View Summary right-click menu option for the top record in the grid of the My Stuff dialog has been fixed (bug 1125).
- My Stuff’s Contracts grid display will no longer cut off top and bottom rows for a long list (bug 1133).
- CSV Export from PDF reports now filter out CRs after the contracts have been issued (bug 1144)
- SOW Validation Report: leading zeros for contract numbers, e.g. "00072980," have been removed (bug 1223)
- SOW Validation - rule #24 (WEs with metrics must have Deliverable Title and Specification) is now working consistently (bug 1246).

End of Pisces v.1.66 Release Notes