

Status Reporting in Pisces

Online status reporting is now available in Pisces

Beginning with the month of July 2005, and the July-September quarter, contractors may complete and submit status reports online, using a simple form automatically generated by Pisces based on milestones and deliverables established in the Statement of Work (SOW). The BPA COTR will review and accept status reports online via Pisces. To begin status reporting in Pisces, you must have a Pisces account and write-access to the Statement of Work you wish to report on.

To request a Pisces account, go to <http://www.efw.bpa.gov/contractors/usingpisces.aspx>.

How to begin

BPA COTRs will add the Produce Pisces Status Report work element to each active SOW. Addition of this work element will activate the online status reporting functionality, and will allow the COTR to establish the frequency (monthly or quarterly) of status reporting and email distribution list for status reporting reminders in Pisces. (More about reminders in a later section.)

Once the COTR has added the new Produce Pisces Status Report work element to an SOW, Pisces will automatically generate an online status report form based on the contract milestones and deliverables for each period. The contractor may then log in to Pisces and complete the status report in a single session, or during multiple sessions before submitting it to the COTR. Pisces status reports provide a quick and easy format for marking the progress of each milestone or deliverable that is relevant to that period, adding comments, and sending to the COTR ...all with a few clicks.

NOTE: Contractors will be required to submit **one** status report in Pisces for FY05. For most contractors, this status report will be due October 7, 2005 (if reporting monthly) or October 15, 2005 (if reporting quarterly). Contractors may begin status reporting via Pisces as early as July 2005. To find out if your contract is ready for status reporting, please contact your COTR.

Beginning October 1, 2005, most Fish and Wildlife program contractors will submit contract status reports in Pisces.

Accessing Status Reports

From the Explorer (main) screen, click on the My Stuff icon. Result: the My Contracts tab appears, showing all contracts where you're listed as a contact. Select the contract you wish to report on by double-clicking the contract row. Bold means you have write access to the contract in Pisces. In the future, additional tabs will be added for "Contacts", "Projects", etc.

The screenshot shows the 'Pisces - [Pisces Explorer]' application window. The 'My Stuff' icon in the toolbar is circled in red, with a red arrow pointing to the 'My Stuff' window. The 'My Stuff' window has a 'My Contracts' tab selected. It displays a message: 'You have been added as a contact to the following items. You have write permission to the items in **bold**.' Below this, it lists 'Contracts associated with Gerald McClintock' in a table. A context menu is open over the row for contract 00022456.

Contract #	Title	Status	End
00016175-0	2003-017-00 Integrated Status & Effectiver	Issued	6/30/2006
DEMO-001	*** DEMO 001 - Floodplain Enh. along Sandy	Issued	2/28/2006
00021698	2003-017-00 EXPAND SMOLT TRAPPING &	Issued	2/28/2006
DEMO-002	*** DEMO 002 - RM&E Example	Issued	12/31/2005
00022456	200301700 CHAR CHANNEL & RIPARIAN HA	Issued	2/28/2006
00021174	2003-017-00 EXPANSION OF EX		/31/2006
CR-64982	200301700 EXP UPPER COL STR		/31/2006
CR-65529	2003-017-00 EXP INTEGRATED		/30/2006
CR-66013	200301700 EXP INTEGRATED S		/31/2006

Context menu options for contract 00022456:

- View Summary
- View Current SOW
- View Conversion Notes
- View Status Report
- Print SOW Report

Submitted: _____ Next Due: _____

Buttons: View Item, Close

There are three ways to access status reports from this panel. First, highlight the row of the desired contract. Then do one of the following:

- Right-click and select View Status Report from the context menu options; or
- Double-click any contract row and when the Contract Details panel opens, choose the Status Report tab; or
- Click the Status Report hyperlink at bottom left.

Any of these actions will bring up the Status Report for the target contract.

What Does a Status Report Look Like?

Status reports appear slightly different depending on who is looking at them. The contractor view has a text box for adding general comments about the month's or quarter's activities; comments are encouraged, but optional. NOTE: Only contacts listed in the contract's contact list on the Summary tab can view the Status Report tab. Further, only the COTR and those contacts explicitly granted write permission by the COTR (generally speaking, the contractor) can edit the status report.

The picture below is a contractor's view of a status report.

View: Jul-Sep 2005 - Draft

Current Report
 Period: Jul-Sep 2005
 Due: 10/15/2005
 Submitted: -

Previous Report
 Submitted: -
 Accepted: -

Legend
 G = will complete by the end date
 Y = may not complete by the end date
 R = will not complete by the end date

	Start	End	New End	Complete	Jul-Sep	Contractor Comments
175 - Design for 2 dike breaches (Hotfield and McC...)						
178 - Landowners for the 2 dike bre...					Y	Comments are required when an indicator is yellow.
165 - Supplemental Analysis						
Coordin...	2005	3/1/2005		<input checked="" type="checkbox"/>	G	
Particip...	2005	4/30/2005		<input checked="" type="checkbox"/>	G	
Particip...	2005	5/31/2005	6/15/2005	<input checked="" type="checkbox"/>	R	Comments are required when an indicator is red.
Comple...	2005	6/15/2005	6/20/2005	<input checked="" type="checkbox"/>	R	These text fields have a 100-character limit.
Comple...	2005	6/15/2005		<input checked="" type="checkbox"/>	G	
Obtain...	2005	6/30/2005		<input checked="" type="checkbox"/>	G	Comments are optional when an indicator is green
Obtain...	2005	6/30/2005		<input checked="" type="checkbox"/>	G	
180 - McC...				<input checked="" type="checkbox"/>	G	
Environmental compliance documentation	6/30/2005	7/1/2005		<input checked="" type="checkbox"/>	G	
Subcontractor hired for implementation	7/1/2005	7/31/2005		<input checked="" type="checkbox"/>	G	
Equipment mobilization complete	8/1/2005	8/8/2005		<input type="checkbox"/>		
Materials for implementation obtained	8/15/2005	8/19/2005		<input type="checkbox"/>		
Deliverable: Deliverable complete				<input type="checkbox"/>		

Jul-Sep 2005 Contractor Comments
 General comments about the activities of the past quarter or month go here. There is no character limit in this text field.

Submit **Close**

DEMO-001 *** DEMO 001 - Floodplain Enh. along Sandy River Bonneville Power Administration McClintock, Gerald TEST: 1.56.0.0126

COTR's View of a Status Report

The COTR may choose to accept the status report and add comments, or return it to the contractor.

Current Report
 Period: Aug 2005
 Due: 9/7/2005
 Submitted: -

Previous Report
 Submitted: 7/1/2005
 Accepted: 7/1/2005

Legend
 G = will complete by the end date
 Y = may not complete by the end date
 R = will not complete by the end date

	Start	End	New End	Complete	Jul	Contractor Comments
6 - <No Work Element Title Entered>				<input checked="" type="checkbox"/>	G	Done
Deliverable: Deliverable complete				<input checked="" type="checkbox"/>	G	Done
5 - <No Work Element Title Entered>				<input checked="" type="checkbox"/>	G	Done
Environmental Compliance Requirements	10/1/2004	12/31/2004		<input checked="" type="checkbox"/>	G	Done
Deliverable: Deliverable complete				<input checked="" type="checkbox"/>	G	Done
4 - <No Work Element Title Entered>				<input checked="" type="checkbox"/>	G	Done
Deliverable: Deliverable complete				<input checked="" type="checkbox"/>	G	Done
172 - Land Acquisition/Conservation Easements				<input checked="" type="checkbox"/>	G	
Obtain title search and report	10/16/2004	1/1/2005		<input checked="" type="checkbox"/>	G	
Acquire BPA review and approval of appr	10/16/2004	8/16/2005		<input checked="" type="checkbox"/>	G	
Coordinate with BPA and Corps on poten	10/1/2004	8/16/2005		<input type="checkbox"/>	G	Although I've
Identify cost share partnerships	10/1/2004	9/30/2005		<input type="checkbox"/>	Y	
Coordinate landowners	10/1/2004	9/30/2005		<input type="checkbox"/>	G	
Review definition of easement terms anc	10/1/2004	9/30/2005		<input type="checkbox"/>	G	
Deliverable: Deliverable complete				<input type="checkbox"/>	G	
119 - Manage and Administer Projects				<input checked="" type="checkbox"/>	G	
FY04 BiOp Metrics	10/1/2004	11/30/2004		<input checked="" type="checkbox"/>	G	
Develop Statement of Work in Pisces	4/1/2005	4/30/2005		<input checked="" type="checkbox"/>	G	
Develop FY05/06 Statement of Work	5/1/2005	7/31/2005	7/31/2005	<input type="checkbox"/>	R	Due to prob

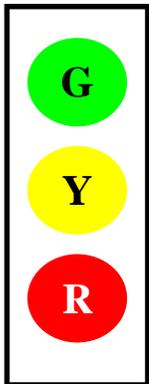
Aug 2005 Contractor Comments

Aug 2005 COTR Comments
 Great job. Keeping working with TNC, they could prove to be a valuable partner.

Return to Contractor | **Accept** | Close

Status Report Shortcuts and Features

- Hit the spacebar to copy the green, yellow or red indicator from the previous item to the next item (in the same month or quarter column).
- On first day of the performance period, the View dropdown box has only one item, the first Status Report Period in Draft state (e.g. for a contract starting 1/1/2005, on 1/1/2005, the contractor would see only one item in their dropdown, "Jan 2005 - Draft").
- Maroon column headings indicate columns containing editable content. Sorting columns on the Status Report tab is not supported.
- A bolded, italicized End Date signifies the date has changed since the original contract.
- Contractors always see the current status report (even immediately after submitting a status report, the contractor's view immediately refreshes, showing a read-only version of their report, but flagged as "Submitted." Not until the prior period's report is "Accepted" by the COTR can the Contractor start reporting status on the next period.



Green, Yellow and Red: What Do These Colors Mean?

Green:

The milestone or deliverable will be completed as on time as anticipated in the SOW. No foreseeable obstacles or issues. No comments necessary.

Yellow:

There is some chance that the milestone or deliverable will not be completed, or will be completed late. Comments required.

Red:

The milestone or deliverable will not be completed at all, or will be completed late. Comments required.

Status Reporting Protocols

Below are listed a number of protocols or rules for submitting and accepting a status report. Don't worry about memorizing these – Pisces will let contractors and COTRs know when their status report needs some tweaking. When the contractor clicks Submit or the COTR clicks "Accept" Pisces will validate the status report and make sure all the rules have been met.

- Contractors will report status for deliverables that have not yet been completed and accepted by the COTR.
- Contractors will report status for milestones that have already started but are not yet complete. When a milestone is complete, the contractor should mark the milestone's Complete checkbox and enter a comment.
- Comments must be provided by the contractor when marking a milestone Red or Yellow.

Status Reporting Protocols, continued

- When the contractor enters a New End date, he or she is effectively requesting a new date; that requested date won't become the official end date of the milestone until the COTR accepts the status report. If a contractor requests a New End date for a milestone, it must fall within the performance period. Whenever a contractor enters a New End date, even if it is sooner than the original date, a comment is required.
- Pisces will ask the contractor to provide confirmation upon clicking Submit. A message will pop up saying "This will submit your report to your COTR, [insert COTR name]. Are you sure you are ready to submit?" If a contractor accidentally submits a status report too early, he or she can notify the COTR, who can use the "Return to Contractor" function to return the status report.
- COTRs may ask contractors to submit status reports on either a monthly or quarterly basis. Due dates are as follows: for monthly reports, the 7th of each month (covering the previous month's activities), and for quarterly reports, 15 days after the end of each quarter (April 15th for Jan-Mar, July 15th for Apr-Jun, etc.).
- The final status report is now due within the performance period of the contract. So, if your contract has a performance period of June 1, 2005 through May 31, 2006, the final report will be due May 31, 2006 whether you have monthly or quarterly reports.
- Pisces does not create milestones for reports that are in the past.
- The contractor will indicate completion of a deliverable by marking its checkbox in the status report. While you won't see a date on the screen, Pisces records the date the deliverable was marked complete in order to accommodate reporting of completed deliverables at the end of the fiscal year.
- To see a complete list of validation rules, go to <http://www.efw.bpa.gov/contractors/StatusReportValidationRules.pdf>.

Pisces Status Report Views and Permissions are User-Sensitive

- Depending on who you are, you'll have different access and visibility to status reports.
- Contractors can only view status reports for contracts where they are added as a contact. They can only edit status reports for contracts where they have been given explicit write access by their COTR.
- COTRs, Contracting Officers, & BPA Management, as well as those on the contract's contact list can see one of two "flavors" of the Status Report: 1. Report as submitted by the contractor but not yet accepted by the COTR, or 2. Report as accepted by the COTR.
- Only the contractor may see a "Draft" status report that they have yet to submit.
- Only the COTR assigned to the contract may make changes to a submitted or accepted report.
- In the future, Northwest Power Planning and Conservation Council (Council) members and staff and Columbia Basin Fish and Wildlife Authority (CBFWA) staff will be able to see the "Cumulative" reports that summarize accepted status reports at the level of deliverable status (not milestones).
- All others – e.g. contractors not affiliated with a contract – will not see the Status Report tab at all. Eventually some reports may be available, but likely not until we support rolling up status at the project level.

Reminders and Notifications

Pisces will automatically generate – based on COTR and contractor preferences -- two kinds of email messages to help keep people apprised of contract-related events and requirements. These are **notifications** and **reminders**.

<p>Notifications are based on events. Sample notifications:</p> <ul style="list-style-type: none"> ➤ Status Report Submitted ➤ Status Report Accepted ➤ Status Report Returned ➤ Deliverable Marked Complete 	<p>Reminders are based on the passing of time. Sample reminders:</p> <ul style="list-style-type: none"> ➤ Milestone due in 10 days ➤ Milestone due today ➤ Late Milestone – due 5 days ago <p>Reminders are always set at the Milestone level.</p>
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When the COTR sets up online status reporting for each contract, he or she will also assign an email distribution list for reminders associated with status reporting, and will choose the reminders the contractor will receive. For example, the COTR may assign a contractor to receive the reminders below:

Status Report Configuration - Contract # CR-64982

Pisces can automatically create reminders for each Status Report milestone.

Possible Reminders

- Milestone due in 30 days
- Milestone due in 15 days
- Milestone due in 10 days
- Milestone due in 5 days
- Late Milestone - due 15 days ago
- Late Milestone - due 30 days ago

Selected Reminders

- Milestone due in 2 days
- Milestone due today
- Late Milestone - due 5 days ago

Reminder Details

Owner: Gerald Mcclintock
 Message: Standard Custom
 To: "Gerald Mcclintock" [gmclintock@bpa.gov]; "Mike Ward" [wardski@televar.com]
 Subject: Milestone "[MilestoneTitle]" is due in 2 days

Dear [RecipientFirstName],

Milestone "[MilestoneTitle]" of work element "[WorkElementName]" on contract # [ContractNumber] is due on [MilestoneEndDate].

If you feel this email has reached you in error, please contact the assigned COTR.

Thank you,

Select Recipients

Show names from the: **Current Contract's Contacts**

Name	Email Address	Phone Number	Organization
Hillman, Tracy	tracy.hillman@bi...	(208) 939-4052	Bioanalysts, Inc.
Jordan, Chris	Chris.Jordan@no...	(206) 860-3423	National Oceanic and ...
Lanigan, Steve	slanigan@fs.fed.us	(503) 808-2261	<Known but not in list>
Mcclintock, Gerald	gmclintock@bp...	(503) 230-5375	Bonneville Power Adm...
Nadeau, Mark	mhnadeau@bpa...	(503) 230-5889	Bonneville Power Adm...
Ward, Mike	wardski@televar...	(509) 486-2426	Terraqua, Inc.
Weintraub, Nancy	nhweintraub@b...	(503) 230-5373	Bonneville Power Adm...

To: "Gerald Mcclintock" [gmclintock@bpa.gov]; "Mike Ward" [wardski@televar.com]

To delete a recipient, click on the name and press the DEL or Backspace key.

Contractors May Set Up Their Own Reminders and Notifications

To sign up for notifications, double-click on your contract row in the Explorer and go to the Summary tab (or use the "My Stuff" window). Click the Notifications button. The Contract Notification window appears. Before adding yourself, you might want to see if your COTR has already signed you up for certain notifications; to do this, simply click the "View all notifications and reminders" hyperlink at the bottom edge of the window.

Select the notifications you wish to receive by highlighting them in the "Possible Notifications" list and then clicking the ">" button to move them to the "Selected Notifications" list. Pisces automatically adds you to the "To" list. As a contractor, you do not have the ability to sign anyone else up for notifications or reminders, so the "To" button will always be disabled.

Project Management Information

Project Number: 1999-019-00
 Project Title: Restore Salmon River (Challis,
 Project Manager: McClintock, Gerald
 Province: Mountain Snake
 Sub-Basin: Salmon
 Contract Number: 00006116
 Contract Title: 1999-019-00 RESTORE SALMON RIV
 Contract Status: Issued
 Work Order ID: 89478
 Task ID: 1
 Contract Type: Contract (IGC)
 Pricing Method: Cost Reimbursement (CNF)

Prime Contractor: Custer County SOI

Contact Name	Organiz
Bragg, Karma	Custer Co
Christianson, Carl	US Army (
O'Neal, Ted	Custer Co
Stark, Mark & Brenda	<Intereste
McClintock, Gerald	Bonneville
Dowling, Angela	Bonneville

Notifications

When events related to this contract occur, you can have Pisces send the following notifications.

Possible Notifications	Selected Notifications
Status Report Submitted	
Status Report Accepted	
Status Report Returned	
Deliverable Marked Complete	

Notification Details

Owner: Enabled
 Message: Standard Custom
 To:
 Subject: Status Report Submitted
 Dear [RecipientFirstName],
 A status report for contract # [ContractNumber] has recently been submitted by the contractor. You may view the submitted report in Pisces.
 If you feel this email is inappropriate, please contact the contractor.
 Thank you,

Select Recipients

Show names from the: Current Contract's Contacts

Name	Email Address	Phone Number	Organization
Hillman, Tracy	tracy.hillman@bi...	(208) 939-4052	Bioanalysts, Inc.
Jordan, Chris	Chris.Jordan@no...	(206) 860-3423	National Oceanic and ...
Lanigan, Steve	slanigan@fs.fed.us	(503) 808-2261	<Known but not in list>
McClintock, Gerald	gmccintock@bpa...	(503) 230-5375	Bonneville Power Adm...
Nadeau, Mark	mhnadeau@bpa...	(503) 230-5889	Bonneville Power Adm...
Ward, Mike	wardski@televar...	(509) 486-2426	Terraqua, Inc.
Weintraub, Nancy	nhweintraub@b...	(503) 230-5373	Bonneville Power Adm...

To-> "Gerald McClintock" [gmccintock@bpa.gov]; "Mike Ward" [wardski@televar.com]

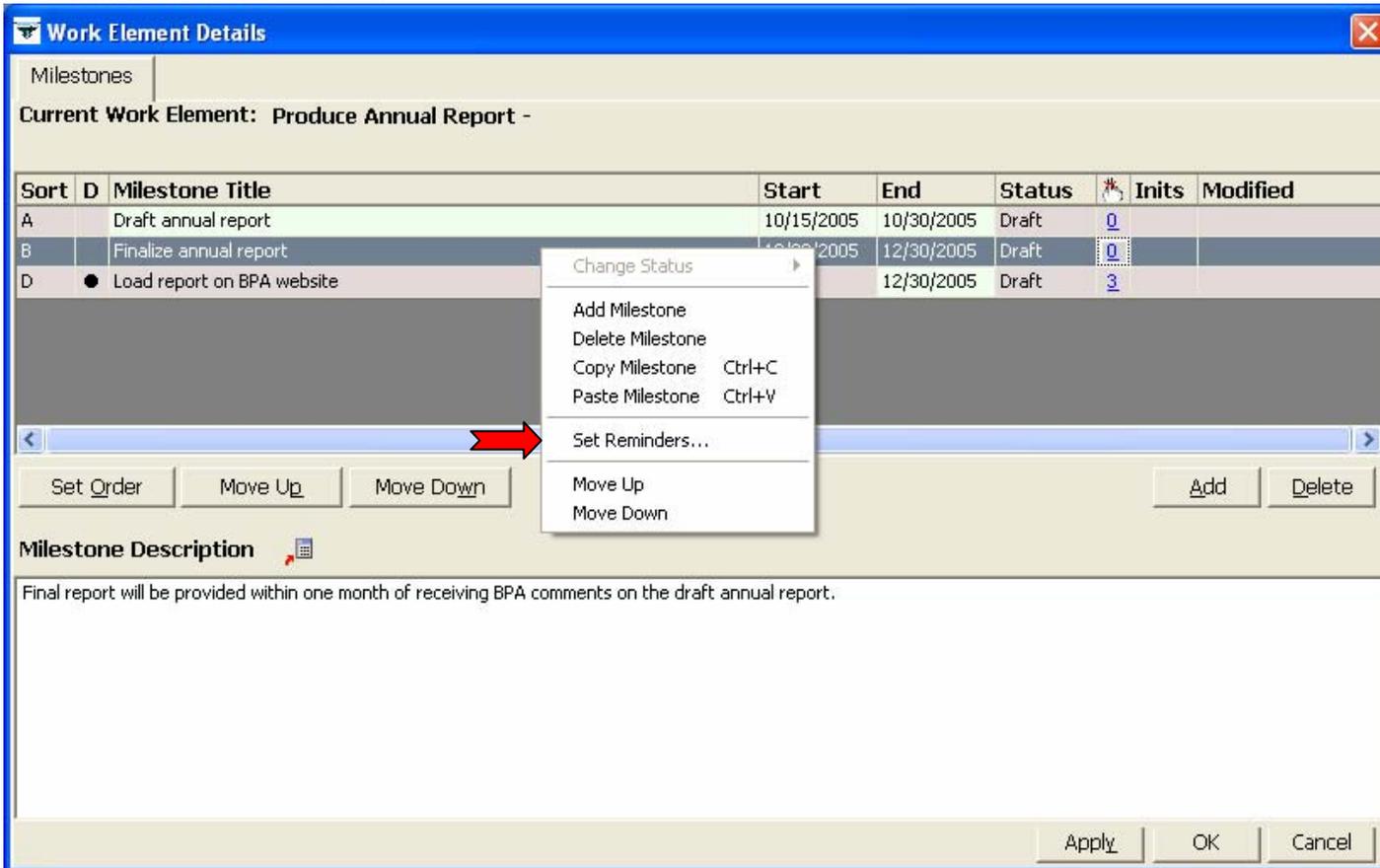
To delete a recipient, click on the name and press the DEL or Backspace key.

Reminders and Notifications, continued

Reminders are set at the milestone level; to set reminders, it is necessary to open the Statement of Work and drill down to milestones.

To sign up for reminders, double-click on your contract row in the Explorer and go to the SOW tab (or use the "My Stuff" window). Select the work element that has the milestone(s) you wish to create a reminder about. Examples: Annual Report due date (under Produce Annual Report), due date for submitting next year's SOW and budget to BPA (under Manage and Administer Projects).

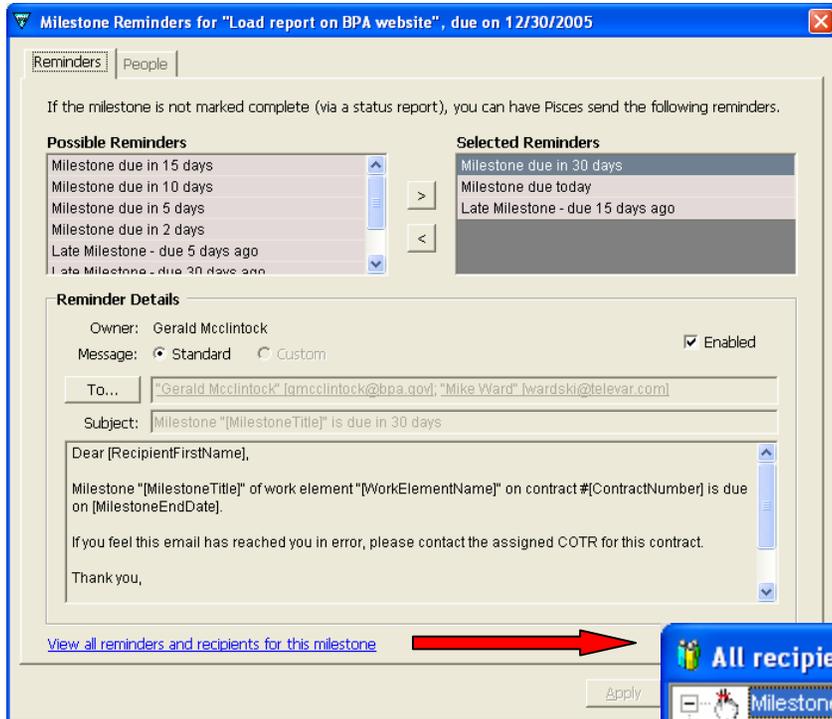
Click the blue hyperlinked number under the reminder icon , or right-click on any milestone and select **Set Reminders**. Double-click a possible reminder or use the > button to select a reminder.



The screenshot shows the 'Work Element Details' window with the 'Milestones' tab selected. The current work element is 'Produce Annual Report'. A table lists three milestones with columns for Sort, D, Milestone Title, Start, End, Status, Inits, and Modified. A context menu is open over the second milestone, showing options like 'Change Status', 'Add Milestone', 'Delete Milestone', 'Copy Milestone', 'Paste Milestone', 'Set Reminders...', 'Move Up', and 'Move Down'. A red arrow points to the 'Set Reminders...' option. Below the table are buttons for 'Set Order', 'Move Up', 'Move Down', 'Add', and 'Delete'. At the bottom, there is a 'Milestone Description' field with the text: 'Final report will be provided within one month of receiving BPA comments on the draft annual report.' and buttons for 'Apply', 'OK', and 'Cancel'.

Sort	D	Milestone Title	Start	End	Status	Inits	Modified
A		Draft annual report	10/15/2005	10/30/2005	Draft	0	
B		Finalize annual report	11/30/2005	12/30/2005	Draft	0	
D	●	Load report on BPA website		12/30/2005	Draft	3	

Reminders and Notifications, continued



Although contractors may sign up for additional reminders and notifications, they may not remove themselves from any reminders and notifications the COTR has set for them. These may be negotiable, however; contact your COTR to discuss.

Pisces allows the COTR to disable a reminder in the event it becomes unnecessary. For example, if the COTR already knows a contractor is working on and may complete a milestone 8 days before it is due, he or she may disable the reminder "Milestone due in 5 days," but perhaps keep the reminder "Milestone due today", just in case the milestone is not completed on time.

When a milestone has been marked complete (for example, the submission of a status report), Pisces will stop sending reminders for that milestone.

Need help?

Contact your COTR or fishsupport@bpa.gov.

