Rules for Validating Statement of Work

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SOW Type: Contract

This report lists business rules used by the SOW Validation report to evaluate Statements of Work in Pisces. The Area and Problem Statement columns appear in the SOW Validation report. This report can be run for either Contract or BPA-Internal Statements of Work. Report is sorted by Area, then by Type (Mandatory/Recommended), and then by Rule #.

Project and Contract Rules

#	Rule	Area (tab, window, etc.)	Type	Problem Statement (with implied solution)
13	Must have a Contract Description.	Contract Summary tab	Mand.	Contract Description is blank.
16	Must have a CONTRACT contact with the role of "Supervisor".	Contract Summary tab	Mand.	A non-BPA contact with the role of "Supervisor" has not been added to Contract Contacts.
17	Must have a Contract EC Lead contact if the SOW contains work elements requiring EC Review.	Contract Summary tab	Mand.	An EC Lead has not been added to Contract Contacts, yet the SOW contains a work element that requires EC Review.
18	Must have Role set for each contact.	Contract Summary tab	Mand.	One or more contacts does not have an assigned role.
46	Must have a Contract contact as "Contract Manager" from an organization other than BPA.	Contract Summary tab	Mand.	A non-BPA contact with the role of "Contract Manager" has not been added as a Contract contact.
59	Primary Vendor is not the same as of the previous contract.	Contract Summary tab	Mand.	A renewed contract must have the same Primary Vendor as the original contract. Only the BPA COTR can fix this.
19	Should have an active notification set for at least one event such as Status Report Submitted or Status Report Accepted.	Contract Summary tab	Rec.	No notifications have been set for this contract.
15	Must have a non-BPA PROJECT contact with a role of "Project Lead" and having Write Permission.	Project Summary tab	Mand.	A non-BPA contact with a role of "Project Lead" plus having Write Permission has not been added to Project Contacts.
29	Must have a Project Summary.	Project Summary tab	Mand.	Project Summary is blank.
40	Must have Role set for each project contact.	Project Summary tab	Mand.	Project Contact does not have an assigned role.

SOW and Work Element Rules

#	Rule	Area (tab, window, etc.)	Type	Problem Statement (with implied solution)
37	Must have a Transmittal Memo attachment for a new contract starting 10/1/2007 or after.	Contract Attachment tab	Mand.	A contract SOW must have a Transmittal Memo attachment. Only the BPA COTR can fix this.
38	Must have a Line Item Budget attachment for a new contract starting 10/1/2007 or after.	Contract Attachment tab	Mand.	A contract SOW must have a Line Item Budget (Contractor Budget, not Subcontract Budget) attachment.
39	Property Inventory attachment is required but not attached.	Contract Attachment tab	Rec.	Property Inventory attachment is marked as required in the Workflow tab, however it has not been attached in Attachments tab.

SOW and Work Element Rules

#	Rule	Area (tab, window, etc.)	Type	Problem Statement (with implied solution)
1	Must have a Work Element Title.	SOW tab	Mand.	Work Element Title is blank.
3	Must have at least one Milestone.	SOW tab	Mand.	Work Element has no Milestones.
4	Must have a Work Element Description.	SOW tab	Mand.	Work Element Description is blank.
7	Must have a Deliverable milestone with Specification.	SOW tab	Mand.	Deliverable milestone has not been added, or added but missing a Specification.
20	Must have a WE#185 (Produce Status Report).	SOW tab	Mand.	Work Element 185 (Produce Status Report) has not been added to the SOW.
22	Must have a WE#119 (Manage and Administer Projects).	SOW tab	Mand.	Work Element 119 (Manage and Administer Projects) has not been added to the SOW.
23	Must have WE#132 (Produce (Annual) Progress Report).	SOW tab	Mand.	Work Element 132 (Produce (Annual) Progress Report) has not been added to the SOW.
33	Must use work elements that are valid for the fiscal year corresponding to the start date of the SOW.	SOW tab	Mand.	This work element expired before the start of the contract. Try adding work elements via the Add button in the SOW tab to ensure they are valid for the SOW.
35	Must notify the EC Lead.	SOW tab	Mand.	The EC Lead must be notified via the Submit button on a new or modified SOW. Only the BPA COTR can fix this.
57	SOW submission to COTR has not occurred.	SOW tab	Mand.	PRIME CONTRACTOR: When the SOW is ready for COTR review, click Submit on the SOW tab to notify the COTR. The submission has not occurred.
21	Should have a WE#165 (Produce Environmental Compliance Documentation).	SOW tab	Rec.	Work Element 165 (Produce Environmental Compliance Documentation) has not been added to the SOW. It should be if the SOW contains one or more work elements that require EC Review.
30	Should NOT have any WE Titles,WE Descriptions, Deliverable Titles, or Deliverable Specifications that begins with "COPY:".	SOW tab	Rec.	Work Element Title, Description, Deliverable Title, or Deliverable Specification field begins with the word "COPY:".
31	Should NOT have a Deliverable Title that contains "Deliverable Complete".	SOW tab	Rec.	Deliverable Title of a work element should not contain "Deliverable Complete".
47	Should have WE#174 "Produce Plan" with a milestone titled "Produce an Annual Operation Plan".	SOW tab	Rec.	Should have WE#174 "Produce Plan" with a milestone titled "Produce an Annual Operation Plan" when the SOW contains a WE#176 or WE#61.
2	Must have a Planned Budget estimate for every work element.	WE Budgets tab	Mand.	Work Element Planned Budget is blank. If this work truly has no cost, or if it will be covered with cost-share monies, enter $0.
45	Planned Budget Total of all work elements must match Contract Requisition Contract Value	WE Budgets tab	Mand.	The Planned Budget Total of all work elements does not equal the Contract Value.
41	The end date of the final status-report milestone is not the same as the end date of the performance period.	Work Element Details window, Milestone tab	Mand.	The end date of the final status report milestone must be the same as the end of the performance period. Only the BPA COTR or PM can fix this by clicking the [Set Up Status Reports] button on the SOW page.

Work Element Detail Rules

#	Rule	Area (tab, window, etc.)	Type	Problem Statement (with implied solution)
28	Must provide a Primary Focal Species for work elements requiring Focal Species.	Work Element Details window, Focal Species tab	Mand.	This work element requires the identification of at least one Primary Focal Species.
53	WE must have at least one Name / Value pair specified for Area of Inference on the Location tab.This applies only to WE 162.	Work Element Details window, Location RM&E tab	Mand.	WE 162 must have at least one Name / Value pair specified for Area of Inference on the Location tab.
62	Must have a Location for WE#157 RM&E Study Plan.	Work Element Details window, Location RM&E tab	Mand.	There is no Location specified for WE#157's Study Plan's Sample Design. You will need to set this in monitoringresources.org.
63	Must have an Area of Inference for WE#162 RM&E Study Plan.	Work Element Details window, Location RM&E tab	Mand.	There is no Area of Inference (AOI) specified for WE#162's Study Plan's Sample Design. You will need to set this in monitoringresources.org
67	Must have a Sample Design Calendar Year selected for WE#157 on RM&E Tab for worksite determination	Work Element Details window, Location RM&E tab	Mand.	There is no Sample Design Calendar Year selected for WE#157's Sample Design selection needed to determine worksites.
26	Must provide a latitude and longitude for work elements requiring Location.	Work Element Details window, Location tab	Mand.	This work element requires a location (latitude and longitude).
32	Must provide a Planned value for every checked metric for work elements requiring metrics.	Work Element Details window, Metrics tab	Mand.	This work element requires a Planned metric value for every checked metric. This must be done before the contract or contract change is issued.
48	Must select and add at least one metric for every metric set.	Work Element Details window, Metrics tab	Mand.	This work element requires at least one metric added for every listed metric set. If an added metric turns out not applicable it could be deleted when allowed. A value of zero may also be entered together with a comment to indicate that a metric is not applicable.
64	At least one mark or tags must be selected	Work Element Details window, Metrics tab	Mand.	At least one mark or tags must be selected
49	Must specify RM&E study plan metadata for WE 156.	Work Element Details window, RM&E tab	Mand.	This work element requires RM&E study plan entries.
50	Must specify RM&E study plan and data repository metadata for WE's 157 and 162.	Work Element Details window, RM&E tab	Mand.	This work element requires RM&E study plan and data repository entries.
51	Must specify RM&E data repository metadata for WE's 159, and 160.	Work Element Details window, RM&E tab	Mand.	This work element requires RM&E data repository entries.
61	Must remove the NONE selection if another RM&E Data Repository is selected.	Work Element Details window, RM&E tab	Mand.	RM&E Data Repository selections are not valid. NONE was selected together with at least one other selection. Uncheck the NONE selection to allow the other selection(s) to be saved. Or uncheck all other selections if NONE is the desired choice.
52	RM&E study plan number of sites is different than the number of points captured on the Location Tab.This applies only to WE 157.	Work Element Details window, RM&E tab	Rec.	Number of sites is different on RM&E tab than on Location Tab.
58	RM&E protocol has not been published.	Work Element Details window, RM&E tab	Rec.	The selected protocol in RM&E tab is not yet published on https://www.monitoringresources.org. If you are the protocol owner, please publish it. Otherwise, contact RMEsupport@bpa.gov for assistance.

Milestone Rules

#	Rule	Area (tab, window, etc.)	Type	Problem Statement (with implied solution)
8	Must have a Milestone Title.	Work Element Details window, Milestone tab	Mand.	Milestone Title is blank.
9	Must have a Milestone Start date and End date.	Work Element Details window, Milestone tab	Mand.	Start and/or End date of the milestone is blank.
11	Must have Start and End dates within the SOW performance period.	Work Element Details window, Milestone tab	Mand.	Milestone Start and/or End date are not within the SOW performance period.
25	Must have an End date for the Deliverable milestone.	Work Element Details window, Milestone tab	Mand.	End date for the Deliverable milestone is blank.
10	Should have a Milestone Description.	Work Element Details window, Milestone tab	Rec.	Milestone Description is blank.
12	Should have at least one active reminder set for every status report milestone.	Work Element Details window, Milestone tab	Rec.	No reminders have been set for every status report milestone. To set reminders, from the Milestone tab of the Work Element Details window, click the hyperlinked "0" from the column with the icon that looks like an envelope.
36	Should have an Active "Supervisor" contact as recipient to at least one active reminder for each status report.	Work Element Details window, Milestone tab	Rec.	Each Status Report should include at least one Active Supervisor contact as a recipient to at least one of its Reminders.
42	Should NOT have any Milestone Titles or Descriptions that begin with "COPY:".	Work Element Details window, Milestone tab	Rec.	Milestone title or description field begins with the word "COPY:"
65	Milestone description should not contain instructional text	Work Element Details window, Milestone tab	Rec.	Milestone description contains instructional text