

Release Notes for Pisces version 2.3

Release Date: **June 7, 2007**

The latest release of Pisces, version 2.3, has several notable new features, including the ability to upload annual reports and other attachments directly into Pisces, and an integrated tracking and reporting system for wildlife credits. Updated work element definitions, metrics and location rules are now in Pisces for use in FY08 contracts.

The new “Report Center” for Fish & Wildlife Program data is now live and fully functional. Thanks to the Aries database created in the last release, everyone will now be able to access meaningful, up-to-date, user-friendly reports based on Pisces data via BPA’s website. In addition to a new process for uploading reports directly into Pisces, we’ve also built a new search interface for reports and publications on our website: [Search Publications \(http://www.efw.bpa.gov/searchpublications/\)](http://www.efw.bpa.gov/searchpublications/)

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 2.3 include:

1. Attaching documents directly in Pisces

Pisces now supports attachments: contractors can upload documents, photos, presentations, etc. to their contracts and submit all contract documents in one place.

- a. The new functionality is available via the “Attachments” tab in the Contract Details window (same window that has the SOW and Status Report tabs).
- b. Users will be able to add, edit and delete documents such as line item budgets, property inventories, management plans, HEP reports, environmental compliance documentation, photos and maps. See the [list of attachment types](#) for the types of documents we’ll be supporting with this release, and the various rules associated with them, including who has access to a particular document.
- c. To view and manage attachments, right-click on the desired project or contract in My Stuff or the Explorer window.
- d. To simply view all the attachments under a project, right-click on the desired project in the Explorer. Or, from My Stuff, right-click on a contract, select “View Project” and then select the Attachments tab.
- e. If you click add, Pisces will prompt you to enter the appropriate document information (title, author, document type, etc) and will display guidance about the “rules” (such as allowable size, supported formats, and view permissions) associated with the attachment type.
- f. Because uploading documents can be time-consuming, especially for those with dial up connections, Pisces will complete the upload process in the background so you can perform other tasks with your computer. You can even upload multiple documents simultaneously, and Pisces will display the progress of each.
- g. If you become disconnected from Pisces in the middle of an upload, Pisces will store the uploaded fraction of your document, and you can complete the upload the next time you log in. (You will not have to start over with the upload; you can pick up where you left off by clicking the “Resume Upload” hyperlink in the “Uploaded” column of the Attachments list for your contract.)
- h. For contracts starting October 1, 2007 and later, Pisces will require a line item budget and property inventory to be attached to a contract before it can be issued.

2. Changes to Publications Posting and Searching

- a. Uploading of Publications (e.g., Progress or “Annual” reports) is also handled by Pisces’ new attachments functionality. That means contractors will no longer upload their reports to the BPA website; the process of attaching reports should be much quicker and easier since you’ll have to enter less information. This will also improve BPA’s internal processing time, reducing the lag between your attachment of a report and the time it becomes posted on the web.
- b. To upload a report to Pisces, right-click on the desired contract in the My Stuff or Explorer window. The trick is that all reports must be “attached” to a contract, not a project. Pisces will then prompt you to identify information associated with the report, such as document type, subtype, primary author, etc. The data entry associated with uploading a report should be much less onerous than in the past, since Pisces will automatically add the project and contract information. We have updated our [guidance for how to format reports](#) on our website.
- c. All annual and technical reports previously uploaded to BPA’s website, as well as any new reports attached in Pisces, will be accessible via a [new online search interface for publications](#) that will also include HEP reports, Loss Assessments, etc.

3. Wildlife Crediting

Wildlife crediting information will now be entered and tracked in Pisces.

BPA is responsible for mitigating the impacts to wildlife caused by the development and operation of the dams of the Federal Columbia River Power System (FCRPS). Impacts to Columbia Basin wildlife as a result of the construction of the FCRPS have been quantified by the Northwest Power and Conservation Council through the completion of "loss assessments" for each dam. Through the use of the Habitat Evaluation Procedure (HEP), loss assessments identify "Habitat Units" (HU) lost due to construction and inundation behind the dams. As BPA implements a mitigation activity, it takes credit for its effort. The HUs are measured or estimated and then counted against the loss assessment for the dam being mitigated.

- a. Previously, wildlife credits were tracked in an older, stand-alone database, which was difficult to modify and maintain. Reporting was infrequent (about once a year) and was limited to a few types of reports that could be generated manually from the database. Due to limitations of the data model, BPA could not respond to specific requests for wildlife crediting information.
- b. With this release of Pisces, wildlife credit information is integrated into project management via Pisces. Because wildlife crediting data is now housed in the same database as project data, we are able to provide reports and conduct analysis that combines wildlife parcel/area data with work element budgets, metrics, etc.
- c. The new process for entering and tracking wildlife credit information isn’t significantly different than the current process. The main difference is that it will be supported directly in Pisces. Other notable differences are:
 - The regional HEP team (and not BPA) will enter HEP survey information, primarily HU data into Pisces.
 - The BPA project manager will be formally involved in reviewing the data entered by the HEP team.
 - The BPA Wildlife Crediting Lead will "approve" the HU data entered by the HEP team.
 - We will no longer need to track estimates of habitat units under the metrics for WE# 5, Land Purchase because the HU Estimate, which is developed by the project sponsor at the time of acquisition, will be entered into Pisces by the BPA project manager or the BPA Wildlife Crediting Lead.
- d. During the month immediately following the release, BPA and the Regional HEP team will be conducting a review of all of the HU data that has been imported from our previous wildlife crediting database. Before this review is completed, which should occur around mid-July, the data in Pisces should not be considered final.
- e. Within the next month, the wildlife crediting reports posted on our website at

<http://www.efw.bpa.gov/IntegratedFWP/wildlifecredit.aspx> will be replaced by more dynamic reports available from our new [Fish and Wildlife Program Report Center](#) (updated nightly).

4. Contract Linkages

- a. BPA has a business need to track which contracts are “related” to one another, i.e., when a new contract is a continuation of ongoing work from a previous contract. Previously, the only relationship one contract had with another was having the same parent project. Since a project can have multiple concurrent contracts (at times even with the same contractor), it was often unclear which contracts were related to one another.
- b. The contract linkage feature will help BPA project managers and their supervisors know which soon-to-expire contracts need to have new contracts set up to begin SOW development. When expiring contracts and new contract requests (CRs) are linked, it becomes very clear which contracts are well underway with their renewals and which aren't. Only BPA staff with specific permissions (BPAWriters) can create these linkages.

5. FY08 Work Element Changes

Updated work elements are now available in Pisces for use in FY08 contracts.

- a. Because Pisces keeps track of work elements by fiscal year, contractors don't have to remember which work elements are the most current and okay to use. Based on the start date of the contract, Pisces will only let a contractor pick the work elements appropriate to that fiscal year.
- b. Pisces will also tell users if a work element they've copied from last year's SOW is expired. If you see an expired work element in your Pisces Statement of Work (SOW), click the Add... button on the SOW tab in Pisces. Select the option that searches all work elements (active and expired). Search for the expired WE. Scroll down to the maintenance comments at the bottom to determine which WEs to use instead.
- c. Here is a list of the work element changes for FY08:
 - **1 new WE:** [WE# 191, Watershed Coordination](#) was added to distinguish between Columbia Basinwide coordination, covered by [WE# 189, Regional Coordination](#), and local watershed coordination, covered by the new WE. Whenever possible, coordination should be considered a supporting part of how you do something else. If coordinating to install a fence, include the coordination as part of WE# 40, Install Fence. If coordinating to produce a regional plan, use WE# 174, Produce Plan. If coordinating to decide what work will get done in the future, use WE# 114, Identify and Select Projects. Only in those rare cases where the work doesn't clearly link to a deliverable of another WE would one use WE# 191, Watershed Coordination or WE# 189, Regional Coordination.
 - [WE# 119, Manage and Administer Projects](#) has been narrowed to only cover work to meet BPA administrative requirements. Here again, much of the work that has traditionally been lumped under this work element would fit better under other more specific work elements. For example, the maintenance costs for a truck used to collect data should be spread between the various related WE# 157, Collect/Generate/Validate/Field and Lab Data work elements rather than under WE# 119, Manage and Administer Projects.
 - [WE# 100, Construction Management](#) has been revived to cover construction project management. While we would generally prefer that this work be included in the related on the ground work element, we acknowledge that construction management often occurs in a different contract with a different contractor.
 - **A few changes to the location rules.** Mostly, these involved expanding the location rules to allow multiple points on hatchery work elements.

- **Numerous changes to work element names, definitions, and [background pages](#) to provide clarity.**

6. Report Center

With this release, we are also launching a new [Fish & Wildlife Program Report Center](http://www.efw.bpa.gov/IntegratedFWP/reportcenter.aspx) (<http://www.efw.bpa.gov/IntegratedFWP/reportcenter.aspx>), which will include a series of Program reports based on Pisces data. While much of this data has been available for several months to the contractor community via Pisces, publishing reports on the web will provide an unprecedented degree of transparency to the Program. These reports enable those outside the Fish and Wildlife Program to understand what we do, how we do it, at what cost and toward what results.

It is important to note that we are able to make this information available now because of the time and energy our contractors and project managers have invested entering data into Pisces over the last two plus years. Thanks to their efforts, we can quantify the collective accomplishments of the Program as never before.

- The Report Center will serve as our central location for many of the reports now available in various locations on our website, such as the Contract Running Balance Report and budget-to-actual reports.
- New reports, such as the Types of Work Funded report and the Habitat Metrics by Fiscal Year report, make aggregate Program accomplishment information available for the first time. Additional reports may be added in the future.
- Most reports provide links to download the report data to Excel or CSV format, for those who wish do their own sorting and analysis.

Fixed Bugs

While most bugs are encountered by only a handful of users, it can be frustrating if you happen to be the one using the application when it does something it shouldn't, or doesn't do something it should. Although it is customary to describe the bugs themselves in a list such as this, we prefer to describe the fixes, i.e., what works correctly now that the bugs have been "exterminated".

- Contacts: viewing the available roles of a contact will no longer flag the associated contract with unsaved changes.
- Contacts: exiting the Contact Details dialog after viewing a contact's contracts will no longer cause a 'save changes?' prompt.
- Contract Summary tab: contacts with write permission and COTRs can no longer edit the contract description when there are one or more "Unlocked" Agreement Revisions that have Work Statement Revisions.
- Contract - Summary tab: exiting Pisces with unsaved changes in contract description will not lead to loss of the top work element's description.
- Project - Summary tab: Contractors with write permission will not be prevented from modifying a project summary.
- Contract Status Report tab: Running a global spelling check on a status report that has a completed Environmental Compliance Requirements milestone will not cause an "Unhandled Exception".
- Tools – Options: Default login username is automatically saved at login.
- Contract - SOW tab: For WE 61 and WE 190, checking or un-checking the deliverable requirement check box does not immediately enable or disable the work element Description, Deliverable Title, and Deliverable Specification.
- Contract - Status Report tab: on contracts that start before 10/1/2006, the status of EC milestones will now be editable.

End of Pisces v.2.3 Release Notes