

June 7, 2007

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#### **Topic**

Attachments

#### **Background**

With the exception of the Statement of Work (SOW) contractors had to transmit supporting documents required for the contracting process outside of Pisces. Typically, this meant sending an email to the COTR. Often documents would get out of synch and it would be unclear which was the most current. Moreover, documents would reside in several places at the same time: the email it came in, the user's computer or network drive, etc.

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. This will be facilitated by a new SOW report that will eliminate duplication of documents between Pisces and BES, so you are encouraged to start using the attachments tab for any contract still in the CR stage for contract related documents.

#### **Discussion**

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

Progress reports (formerly known as annual reports) will also be "uploaded" via Pisces eliminating the BPA upload website. Along with this comes a new publications search website, but more on that topic later in this document (click here to jump to the <u>Publication search website</u>).

Contacts with explicit write permission to a contract will be able to add, edit and delete documents such as line item budgets, property inventories, management plans, HEP reports, environmental compliance documentation (BPA Environmental Lead only), photos and maps. See the <u>list of attachment types</u> 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. **It is important to use the right attachment type: Please choose wisely.** 

The new functionality is available via the "Attachments" tab in the Contract Details window (same window that has the SOW and Status Report tabs). An "Attachments" tab, available at the project level, lists all attachments available from the associated contracts.

## Step-by-Steps

To view or manage attachments, right-click on the desired contract from My Stuff; and select View Attachments.

My Contracts			
	are a contact o sociated with		g contracts. If you se Im
Contract #	Project #	Contract Tit	le
22664	1994-054-00	BULL TROUT I	HISTORY/GENETICS/H
6212	1994-054-00	BULL TROUT I	LIFE HISTORY, GENETI
CR-88467	2007 200 00		SIGN BERG-WILL & OL
CR-89052	19 View Sum	· ·	/ER FISH HABITAT
29977	19 View Curr	B	VER FISH HABITAT-PIF
33295	20 View WE		CONSOLIDATION
30656	20	rnal Notes	USE-TENMILE HABITA
30748	19 View Atta		IODEL WATERSHED P
26681	19 View Proj	ect C	OUT HISTORY/GENETI
32910	19		OUT HISTORY/GENETI
26628	20 Print SOV	/ Report [	OUT IN BONNEVILLE RI
26435	19 Export Da	ata 0	DUT LIFE HISTORY, GE
31695	2007-157-00		OUT STATUS & ABUND.

Figure 1 (Context menu from My Stuff)



The attachments tab will appear for the selected contract. To attach a document click the Add... button.

🐨 Contract Details 🛛 2	00739600 CAP FINAL	DESIGN BERG-WILL	& OLD LOWDEN SC	REENS 🔳 🗖 🔀
Summary SOW W	/E Budgets   Status Rep	ort   Internal Notes	Attachments	
	nd manage document att es and (Annual) Progress			more about the
Attachments				
		_		
Author: Sarah Branum Description:			<u>A</u> dd	Edit Delete
				Close

#### Figure 2 (Attachments Tab)

The Add Attachment dialog box appears (see **Figure 3**). If information is incorrect or missing, an exclamation point will appear next to the errant field **()** (In the example below, the user is trying to add a second transmittal memo). Hover your mouse over the icon for more information about the specific error.

۸	dd Attachment		D
Whe futu	en adding an attachmeni re. Italicized fields are op	t you need to provide the information below - this will help others search for attachments in tional.	the
1.	Туре:	Transmittal Memo	- 0
	Subtype:		-
	Guidance:	An internal BPA contracting process document that provides contextual and process information for BPA managers and Contracting Officers. Max File Size: 100 Kb, File Types Allowed: DOC Other Restrictions: Limited to 1 per SOW revision.	
2.	File:	Browse	
3.	Title:		_
	Description:		~
	Primary Author:	Not listed? Add the author as a conta	ot.
	Other Authors:		
	Doc ID:		
4.	View Permission:	BPA Only - only BPA Pisces users	-
		Upload Cancel	

Figure 3 (Add Attachment dialog)



Pisces will guide you to the required fields as you complete them. Note *italicized* fields are optional. Once you've entered a Type and subtype (where applicable).

- 1. To upload a document to Pisces, right-click on the desired contract in the My Stuff or Explorer window and select View Attachments. All documents must be "attached" to a contract, *not* a project, although you can view them from the project as well.
  - a. Click the Type dropdown (highlighted in **Figure 3** above) to select a document type. This will determine the allowable formats that can be uploaded, viewability permissions, and other settings.
  - b. If the particular attachment Type requires a subtype (e.g., Line Item Budget) you must choose one using the subtype dropdown (for line item budget select Contract Budget or Subcontract Budget)

**NOTE**: Upon selecting the type/subtype, Pisces will present specific guidance including maximum file size, file types allowed (e.g., .XLS, .PDF, .DOC), and how many may be uploaded for that type/subtype.

- 2. Using the browse button, locate the file you want to upload residing on your computer or network drive
- 3. Provide a title that is short but not too generic (e.g., FY07 Budget ODFW). Keep in mind these documents are attached at the contract/CR and associated to the project so you don't have to duplicate that information here.
  - a. Description is optional, as are all *italicized* fields.
  - b. Primary author is selected from a dropdown that is limited to contacts for the contract. If the author is not shown in the list, use the hyperlink and the contacts dialog box will open. You can either select an existing contact, or create a new one. Transfer the contact to the "Contacts selected:" frame and click OK. You can only have one primary author. Adding an author automatically adds them as a contact to the contract.
  - c. If other authors contributed to the document, type their name(s) into the optional "Other Authors:" field.
- 4. If the View Permission field is enabled, use the dropdown to determine who should be able to view the attachment. Many attachment types have their permissions pre-set and do not allow changes.

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 in the Uploaded column

If you become disconnected from Pisces in the middle of an upload, or you stop the 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. (See **Figure 4** below). To manually pause an upload, right-click the attachment and select "cancel upload." You can then either Resume Upload or Delete the partial attachment.

₩ c	ontract Details 200739600 CAP	FINAL DESIGN BERG-	WILL & O	LD LOWDEN SCREENS			
Su	mmary   SOW   WE Budgets   Statu	us Report   Internal No	otes Att	achments			
	this area to store and manage docum delines.	ent attachments releva	ant to this	contract. Learn more about the <u>variou</u>	us attachment types	and <u>(Annual) Pr</u>	ogress Reporting
Att	achments						
Tit	le	File	Size	Туре	Uploaded 🔺	Uploaded By	View Permission
	FY07 Budget 2007 03 30	FY07 Budget 2007 0:	19 Kb	Line Item Budget - Contract Budget	6/7/2007 2:41 PM	Branum	Contacts Only
W	FY07 Memo 2007 03 30	FY07 Memo 2007 03	69 Kb	Transmittal Memo	6/7/2007 2:42 PM	Branum	BPA Only
	FY07 Property 2007 03 30	FY07 PropInventory :	24 Kb	Property Inventory	6/7/2007 2:43 PM	Branum	All Pisces Users
(A	Management Plan template	Pages from Pages fro	3.97 Mb	Management Plan	Resume Upload	Branum	Public (via web)
	thor: Audrey Ahmann					<u>A</u> dd	Edit Delete
De	scription:						
							Close

Figure 4 (Attachments grid)



Once a document has been uploaded, the Edit... and Delete buttons are enabled. Depending on the status of the CR/contract or CCR/Amendment, not all actions are possible.

Editing an attachment allows you to modify the metadata (i.e., Title, Description, Author(s), etc.) without changing the document itself. Of course you can also replace the file with another version of the same name or a different file.

Click the Edit... button: the Edit Attachment dialog box displays. The type/subtype fields cannot be edited, but all others can be. If the document was uploaded with the incorrect Type, add the document again using the correct Type, and delete the old one. Note the File: field is grayed out by default. If you need to replace the existing document, click the "Upload the attachment again" checkbox. To submit the exact same file no further action is needed. If you're replacing the document with another file, locate it using the Browse button.

🐨 Edit Attachment				×
When adding an attachmen future. Italicized fields are op	t you need to provide the info otional.	rmation below - this will help o	others search for attachm	ents in the
Туре:	Management Plan			~
Subtype:				Ŧ
Guidance:	wildlife management and hatche	s Allowed: DOC, WPD, PDF, TXT	and or a facility. Common for	
File:	Upload the attachmen	<b>t again</b> 999-019-00\Management Pla	an\Pages fromBrows	se
Title:	Management plan template	e		_
Description:				~
Primary Author:	McDonald, Ken	▼ Not li:	sted? <u>Add the author as a cor</u>	itact.
Other Authors:				_
Doc ID:	P102604			
View Permission:	Public (via web) - public vi	ia BPA's website, or anyone (	with a Pisces account	•
Original Upload:	6/7/2007 5:12 PM	Original Uploader:	Sarah Branum	
Last Upload:	6/7/2007 5:13 PM	Last Uploader:	Sarah Branum	
			ОК С	ancel
Liques E /Edit Al	Hachmont dialo	1 \		

Figure 5 (Edit Attachment dialog box)



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## **Topic**

Progress Report Upload (formerly Annual Report)

#### **Background**

An effort is underway to streamline not only the process but also the requirement to provide progress reports (formerly known as annual reports). Before Pisces, the Annual Report was the primary way for contractors to convey to BPA, Council and the Region their accomplishments for a 12-month period (typically federal fiscal year). With the introduction of Pisces the fish and wildlife program achieved greater accountability and transparency. With a simple report one could determine how well a contractor was performing, and whether they were completing tasks on time, and on budget. With this release of Pisces, deliverables will be housed in a database accessible via the software. For many types of contracts progress reports may be a thing of the past. However, this is a complicated subject, and the Fish & Wildlife division doesn't want to release guidance prematurely, so for now, only the mechanics of uploading a progress report will change and the broader policies will be communicated at a later date.

#### **Discussion**

A Progress Report is a special type of attachment. Uploading of Publications (e.g., Progress or "Annual" reports) is now accomplished directly in Pisces. 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. When a progress report is uploaded, the COTR will automatically be notified via an email message. Notifications are not sent for any other types.

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 <u>new online search interface for publications</u>. Keep in mind, only documents viewable by the Public are searchable via the website. These include Final Technical and Non-technical progress reports, HEP reports, Impact Assessments, Management Plans, Presentations, and Progress Report comments. For additional information on searching publications, click here <u>Publication search website</u>. Future enhancements may include full text searching of the uploaded reports.

#### Step-by-Steps

- 1. To upload a report to Pisces, right-click on the desired contract in the My Stuff or Explorer window and select View Attachments. The trick is that all reports must be "attached" to a contract, *not* a project.
  - a. Click the Type dropdown and select Progress Report
  - b. Click the Subtype dropdown and select Technical, Draft or Non-technical, Draft. To determine which subtype is appropriate consider the following:
    - i. Technical (scientific) reports will still be expected for projects that produce and/or present relatively large amounts of information, typically in the form of data and analyses of data. Such reports are relatively all-encompassing (spanning the scope of the contract/project), detailed, formal, and often structured according to a prescribed format. BPA will also publish these reports as Department of Energy (DOE) technical reports.
    - ii. Non-technical reports may be prepared when some additional information beyond that included in a Pisces status report should be documented, but an extensive (annual) progress report or technical document would not be necessary.



Pisces version 2.3

2. Locate the progress report to upload by clicking on the Browse... button. Select the report in the Open dialog box and click Open.

🗑 Add Attachment		
When adding an attachment future. Italicized fields are op	: you need to provide the information below - this will he tional.	alp others search for attachments in the
<b>1.</b> Туре:	Progress Report	•
Subtype:	Non-Technical, Draft	•
Guidance:	Progress Reports cover what traditionally have been called a similar reports that cover periods of time longer than a year. T accomplishments and a lessons learned analysis. Non-teohn statement of work format and include a discussion of accomp assessment of results. Most annual reports will fall into this s	These reports typically include ical Progress Reports typically follow a viishments but not a thorough scientific
<b>2.</b> File:	P:\McClintock\Projects\1999-019-00\FY05\Restore	e Salmon River 2005 a Browse
<b>3.</b> Title:	FY2005 Annual Report: Restore Salmon River (12-m	ile reach near Challis, Idaho)
Description:		
Primary Author:	Ahmann, Audrey	Not listed? Add the author as a contact.
Other Authors:		
Doc ID:		
Report Period:	to	× V
4. View Permission:	Contacts Only - only Pisces users listed as contacts	<u>_</u>
		Upload Cancel

#### Figure 6 (Add Progress Report dialog box)

- 3. Add specific information about the report document.
  - a. Enter a title for the document. It would be helpful if the title were the same as the title of the report.
  - b. Provide a description of the report. This could be the report's abstract or other brief outline of the contents. The title and description are searchable fields on Publications Search website. Providing relevant information here will make it easier for others to find documents.
  - c. Select the Primary Author from the dropdown list. If the author is not in the dropdown (the list is created from the contract's contacts), click the hyperlink "Add the author as a contact." Search for the author using the contacts dialog box and click the > button to move the contact to the Selected Contacts field and then click OK. You can only have one primary author. Adding an author automatically adds them as a contact to the contract.
  - d. Additional authors can be typed into the Other Authors field. This is optional, however.
  - e. For the Report Period enter the first date the report period covers in the left field (you can either type in the date using the format mm/dd/yyyy or click on the down arrow to pick the date from a calendar). Next enter the ending date for the report. In the example above the report is for FY2005 so the Report Period would be 10/1/2004 to 9/30/2005.
- 4. Click Upload



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#### <u>Topic</u>

Publication search website

#### **Background**

Along with a new method of uploading documents, and therefore a new way of storing them, came the need to better search the documents. The previous publications search database was only for documents that had gone through the Department of Energy's publishing process.

#### **Discussion**

The introduction of numerous additional types of documents that need to be available to a broader audience than just Pisces users, elicited a new search interface. Previously its own website, the new publications search website is now reached from the new Report Center (described above). If you're looking for reports related to a specific contract, you can also use the attachments tab within Pisces—even for contracts that don't have a Pisces statement of work (SOW).

#### Step-by-Steps

Click <u>here</u> to launch the publications search website, or you can reach it from the Report Center. If the link doesn't work, copy and paste the following URL into your web browser: <u>http://www.efw.bpa.gov/searchpublications/</u>. **Figure 13** displays the new interface. Note three dark blue bands. Clicking on any of them will display a new section and automatically collapse the open section.

General usage notes:

- 1. The dates must be entered using the formats shown.
- 2. When entering dates into the Report Covers Dates fields, note results are returned based on the range. Entering 10/1/2005 to 9/30/2006 would return any document that has a start date *or* end date between these dates (provided it also met any additional criteria). For example a report that covers the dates 10/1/2004 through 12/31/2005 would be returned.
- 3. Identifying the organization will limit the list of primary authors
- 4. Results are displayed in the same web window. **Do not** use your back arrow to return to the search criteria; use the <u>Return to Search</u> link at the bottom of the results page. This will preserve any criteria you have already entered. This is handy if you get back too many results, so you can merely enter additional criteria and click search again.
- 5. Text entered is interpreted as a string (think in quotes). In the example below juvenile fall Chinook requires all three words to be found together in order to be returned (i.e., "juvenile fall Chinook"), not each word.
- 6. A maximum of ten records are returned per page. If more than 10 records match your criteria, a link to subsequent pages will be shown at the bottom of the results page.
- 7. Initially, only progress/annual reports will be available until other document types are attached via Pisces.



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#### Search/View Fish & Wildlife Publications

Search for finalized Progress (a.k.a. Annual) Reports and other publications submitted by the BPA Fish & Wildlife program's contractors/sponsors.

By Title, Description, Type, Author or Publish Date
Publications of type: Progress Report
Titles containing the word or phrase:
Descriptions/abstracts containing the word or phrase:
Organization of the Primary Author:
Primary Author: Johnson, Dave
Date Uploaded: (mm/yyyy)
Report Covers Dates: to: (mm/dd/yyyy)
Search Clear
By Project or Contract
By Document ID

Figure 7 (Typical search by Title, Description...)

By Title, Description, Type, Author or Publish Date
By Project or Contract
Project Number: Contract Number: Search Clear
By Document ID

By Title, Description, Type, Author or Publish Date
By Project or Contract
By Document ID
Document ID:
Search Clear

Figure 9 (Searching by Document ID)

Figure 8 (Project or Contract search)



The following example aims to find any annual report related to juvenile Fall Chinook for fiscal years 2003 through 2006.

- 1. Select Progress Report from the publications type dropdown
- 2. Key-in juvenile fall Chinook (or a subset to return more records, e.g., fall Chinook).
- 3. Type in the start and end dates the report could possibly cover.

If you only were interested in data for Idaho, you might also type Idaho in the Descriptions/abstracts... field.

4. Click Search (**Figure 17** shows the results from this query).

#### Search/View Fish & Wildlife Publications

Search for finalized Progress (a.k.a. Annual) Reports and other publications submitted by the BPA Fish & Wildlife program's contractors/sponsors.

By Title, Description, Type, Author or Publish Date
Publications of type: Progress Report
Titles containing the word or phrase: juvenile fall chinook
Descriptions/abstracts containing the word or phrase:
Organization of the Primary Author:
Primary Author:
Date Uploaded: (mm/yyyy)
Report Covers Dates: 10/1/2002 to: 9/30/2006 (mm/dd/yyyy)
Search Clear
By Project or Contract
By Document ID

Figure 10 (Sample query)

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Pisces Training Documents – External Attachments, Progress Report upload, Publication Search, and SOW Report changes

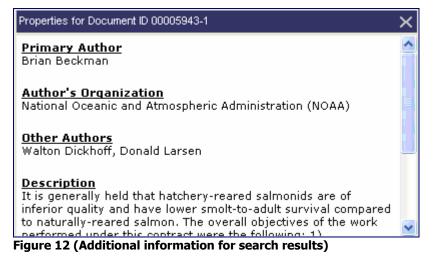
At the top of the results Pisces shows you the search criteria. Notice the word *and*. When entering search parameters **all** conditions must be met for a record to be returned.

Search/\	/iew Fish & Wildlife Publicat	ions				
The pub The title	5 documents where: lication is a: <b>Progress Report</b> and contains: <b>juvenile fall chinook</b> a ument covers: <b>10/1/2002 throu</b> iearch	nd	2006			
Doc ID	Type/Title	Report Covers	Project	Contract	Uploaded	
00028239- 1	[Progress Report] Investigating Passage of ESA-listed Juvenile Fall Chinook Salmon at Lower Granite Dam during Winter	10/2005 - 9/2007	2002- 032-00	00028239	3/1/07	1
00000652- 29	[Progress Report] Hydraulic Characteristics of the Lower Snake River during Periods of Juvenile Fall Chinook Salmon Mi	10/2001 - 9/2006	2002- 027-00	00000652- 00021	12/1/05	0
00010474- 3	[Progress Report] Investigating Passage of ESA-listed Juvenile Fall Chinook Salmon at Lower Granite Dam during Winter	10/2003 - 9/2005	2002- 032-00	00018865	10/1/05	1
00010474- 2	[Progress Report] Investigating Passage of ESA-listed Juvenile Fall Chinook Salmon at Lower Granite Dam during Winter	10/2002 - 9/2004	2002- 032-00	00010474	10/31/04	0
00010474- 1	[Progress Report] Investigating Passage of ESA-listed Juvenile Fall Chinook Salmon at Lower Granite Dam during Winter	10/2001 - 9/2003	2002- 032-00	00010524	3/1/04	1
<u>Return to </u> §	Search 1	-5 of 5		Я	esult Pag	e: :

Figure 11 (Results display)



- 5. Click the additional information icon **1** to display a small window containing:
  - a. Primary Author
  - b. Author's organization
  - c. Other Authors (if provided, otherwise the field will not display)
  - d. Description (may be blank)





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#### **Topic**

SOW Report changes

#### **Background**

The SOW report is an integral part of every contract issued under the Fish & Wildlife Program. Pisces produces an Adobe portable document format (PDF) report using data in the Pisces database. In addition to the SOW, the BPA COTR must submit several documents to the Contracting Officer (CO) before a contract can be issued. These include the contractor and any subcontractor line item budgets; a property inventory spreadsheet (if applicable); and an internal memo with instructions.

#### **Discussion**

With the introduction of attachments the supporting contract documents, once stored in different places, can be associated directly with the CR. By creating a link to these supporting documents, the COTR no longer has to worry about submitting multiple documents to the CO, and the CO can view everything they need from a single document.

#### Step-by-Steps

- 1. Attach all supporting contract documents in Pisces for the associated CR/CCR.
- 2. Print the SOW Report

C C	~~~	a) he	Ya	BONNEVILLE POWER ADMINISTRATION				
v (	$ \rightarrow $		13	DIVISION	N OF FISH AND WILDLIFE			
		Statem	nent of Wo	rk Report				
Project Title:	W	alla Walla Basinwi	de Trib Pas					
Project #:	20	2007-396-00						
Contract Title: Contract #:	20	0739600 CAP FIN	AL DESIGN BE	RG-WILL & OLD LO	WDEN SCREENS			
Province:	Co	lumbia Plateau	Subbasin:	Walla Walla				
Workorder ID:		197553 Task ID:		1	1			
Perf. Period Bud	get: \$2	35,000	Perf. Period:	6/1/2007 - 5/31/2	6/1/2007 - 5/31/2008			
Contract Type:	Re	quest	Pricing Type:	: Cost Reimburse	ment (CNF)			
Contractor(s):	W	alla Walla County	Conservation Di	strict (SWCD) (Prime	e - WALWALCO00)			
BPA Internal Ref	: CF	R-88467						
SOW Validation:	La	st validated 06/04/	2007 with 0 pro	blems, and 10 reviev	vable items			
Contract Documents:		Property Inventory (06/07/2007) FY07 Property 2007 03 30						
	Bu	dget - Contract (0	<u>5/07/2007)</u>	FY07 Budget 2007	03 30			
Contacts:								
Name	Role	Organization	Phone	Email	Address			
Sarah Branum	COTR	Bonneville Power	(503) 230- 5115	stbranum@bpa.gov	P.O. Box 3621, Mailstop KEWU-4			

Brenda Heister

(503) 230-

3531

Bonneville

Administration

Power

Contracting Officer 3621

3621

P.O. Box 3621

Mailstop - NSSP-4

Portland OR 97208-

bsheister@bpa.gov



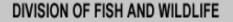
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 To display the contract documents, click on the hyperlinks (these will only appear if a document has been attached). Because many documents have limited viewing permissions, the user will need to provide their Pisces credentials to view the document.

🕘 Pisces Attachment Viewer - Microsoft Internet Explorer 📃 🗖	×
Eile Edit View Favorites Tools Help	7
🚱 Back 🔹 🕥 🔹 📓 🏠 🔎 Search 🤶 Favorites 🤣 🔗 🍚 🛄 🏭	
Address 💩 http://pisces.bpa.gov/release/documents/DocumentViewer.aspx?doc=P102543 🛛 🕑 🚱	D
Requested Document Requires Authentication	^
The document/report you requested has access restrictions. Please provide your Pisces user name (typically your full email address) and password. You can <u>learn more about Pisces</u> , or <u>request a Pisces account</u> from BPA's Fish & Wildlife website. User Name: Password: Submit	
NOTICE: This site is owned and operated by the Bonneville Power Administration, United States Department of Energy. Use of this system is monitored by system and Security personnel. Anyone using this system consents to <u>MONITORING</u> of this use by system or security personnel.	<ul> <li>Image: A set of the set of the</li></ul>
🗟 Done 😔 Local intranet	

Figure 14 (Attachment authentication screen)

4. This functionality was developed with the assumption that contractors would primarily view documents via Pisces, if they're logged into Pisces. If you happen to be in Pisces and then you view a document via the SOW report, you will be logged out of Pisces. The only impact is you will need to reenter your password when you try to resume your session of Pisces.



## **Pisces Attachment Types and their rules**

This report lists the types of attachments supported in Pisces and the rules associated with each type. Currently Pisces only supports attaching documents at the contract level.

Depending on your Pisces user permissions and the state of your contract, you may not be able to add one or more of the attachment types below. For example, line item budgets can only be added when the contract or contract amendment is in Pending state.

Attachment Type	Subtype	Definition	Max # Allowed	Max Size	Required File Type (1) (2)	View Permissions (3)
Communication	Council Communication	Covers official Northwest Power and Conservation Council correspondence (emails or letters) relating to a project or contract. Also includes correspondence from BPA to the Council.	mails or letters) relating to a 10 1MB		doc,wpd,pdf,txt,htm,html,rtf,msg	All Pisces Users or Contacts Only
	Other	Key emails and letters pertaining to a contract or project that are not specifically related to the Council or public relations.				
	Public Relations	Covers communications (emails or letters) of particular interest or sensitivity to the public relations group.				
EC Document		Any document used by KEC, BPA's environmental compliance group, to document completion of environmental compliance requirements. <b>Only EC Leads can add attachments of this type.</b>	5	1MB	doc,wpd,pdf,txt,xls	Contacts Only
HEP Report	Baseline	Describes an initial Habitat Evaluation survey conducted on a parcel of land, and thus establishes a baseline. A Habitat Evaluation Procedure (HEP) report is typically written by the HEP team and determines the habitat units (HUs) associated with a parcel or management area.	50	50MB	doc,wpd,pdf	Public (via web)
	Follow-up	Describes a Habitat Evaluation survey conducted on a wildlife management area sometime after an initial, baseline survey. Follow-up surveys are typically conducted every 5 years or when a significant change occurs with a parcel or area of land. A Habitat Evaluation Procedure (HEP) report is typically written by the HEP team and determines the habitat units (HUs) associated with a parcel or management area.				
Impact Assessment		Identifies "habitat units" lost due to construction of a dam.	1	50MB	pdf	Public (via web)
Line Item Budget	Contract Budget	A BPA contracting requirement that breaks down the Primary contractor's budget into individual line items. Used to justify the contract amount. May include subcontractor budgets.	5 (per agreement revision)	1MB	xls,doc,pdf	Contacts Only
	Subcontract Budget	A BPA contracting requirement that breaks down the subcontractor's (or secondary contractor's) budget into individual line items. Used to justify the contract amount.	10 (per agreement revision)			
Management Plan		A document describing an intended suite of actions for a piece of land or a facility. Common for wildlife management and hatchery operations.	10	50MB	doc,wpd,pdf,txt	All Pisces Users or Contacts Only or Public (via web)
Мар		Geographic products that provide additional information about a project or contract. These attachments are not intended to serve as a repository for geographic data sets.	50	50MB	jpg,jpeg,tif,tiff,drg,pdf	All Pisces Users or Contacts Only
MOU/MOA		Memorandum of Understanding/Agreements are legal agreements between two or more parties, typically between BPA and a contractor/sponsor.	10	1MB	doc,wpd,pdf,txt	Contacts Only
Other		Used only when all other attachment types <i>do not</i> apply.	100	50MB	doc,wpd,pdf,txt,xls,htm,html,rtf,msg,gif,jpg,jpeg,t if,tiff	All Pisces Users or Contacts Only or Public (via web)



## DIVISION OF FISH AND WILDLIFE

# **Pisces Attachment Types and their rules**

Photo		Documents work progress, especially when both "before" and "after" photos are provided. Please, no vacation photos. :)	100	2MB	jpg.jpeg	All Pisces Users or Contacts Only
Presentation		Covers presentations such as those given at conferences, Council, ISRP, ISAB, or IEAB meetings.	5	50MB	ppt	All Pisces Users or Contacts Only or Public (via web)
Progress Report	Non-Technical, Draft	Progress Reports cover what traditionally have been called annual reports and final reports, plus similar reports that cover periods of time longer than a year. These reports typically include accomplishments and a lessons learned analysis. Non-technical Progress Reports typically follow a statement of work format and include a discussion of accomplishments but not a thorough scientific assessment of results. Most annual reports will fall into this subtype. (While various file types are allowed for Draft reports, Final reports must be PDF.)	10	100MB	doc,wpd,pdf	Contacts Only
	Technical, Draft	Progress Reports cover what traditionally have been called annual reports and final reports, plus similar reports that cover periods of time longer than a year. Technical Progress Reports often follow a scientific format. Most research, monitoring, and evaluation (RME) progress reports will fall into this group. These reports include thorough scientific or technical analyses. (While various file types are allowed for Draft reports, Final reports must be PDF.)				Contacts Only
	Non-Technical, Final	Progress Reports cover what traditionally have been called annual reports and final reports, plus similar reports that cover periods of time longer than a year. These reports typically include accomplishments and a lessons learned analysis. Non-technical Progress Reports typically follow a statement of work format and include a discussion of accomplishments but not a thorough scientific assessment of results. Most annual reports will fall into this subtype. (While various file types are allowed for Draft reports, Final reports must be PDF.)				Public (via web)
	Technical, Final	Progress Reports cover what traditionally have been called annual reports and final reports, plus similar reports that cover periods of time longer than a year. Technical Progress Reports often follow a scientific format. Most research, monitoring, and evaluation (RME) progress reports will fall into this group. These reports include thorough scientific or technical analyses. (While various file types are allowed for Draft reports, Final reports must be PDF.)				Public (via web)
Progress Report Comments		Peer review comments provided to BPA on progress reports.	5	1MB	doc,wpd	Public (via web)
Property Inventory		A BPA contracting requirement that lists property associated with a contract, its condition, value, and disposition.	1 (per agreement revision)	1MB	xls	All Pisces Users
SOW Review PDF		A contracting process document used by BPA implementation managers to track comments and request changes to a statement of work (SOW).	1	1MB	pdf	Contacts Only

#### Footnotes:

1. Compressed (e.g. .ZIP) files are not allowed. Pisces automatically compresses files before uploading them.

2. While various file types are allowed for Draft reports, Final reports must be PDF.

3. Explanation of View Permissions (who can view the attachment):

Contacts Only (via Pisces) - Only Pisces users listed as a contact.

All Pisces Users (via Pisces) - Anyone with a Pisces account.

Public (via web) - Public via BPA's website, or anyone with a Pisces account.