Metrics & Location Training for Pisces

December 2005

This document provides an overview of the metrics and location data entry functionality available in Pisces version 1.65, released December 20, 2005. It also provides some step-by-step instructions on how to use these new features.

Pisces version 1.65 also includes some procedural changes with how Statements of Work (SOWs) are initiated by the COTR. Other, smaller enhancements are covered in a separate document: "December 2005 Updates."

New Information Tied to Work Elements.

While most work elements require a physical geographic position, or location, not all require metric data. You can enter both location and metrics data from the newly expanded Work Element Details window (the previous version only had a "Milestones" tab).

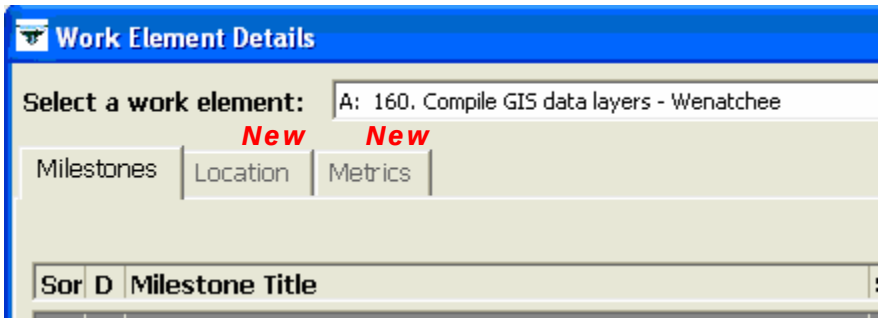


Figure 1

Accessing Location and Metrics Functionality

You can now access milestone, location and metrics information directly from the Contract Details window. Simply right-click on the work element and select the destination you'd like (see Figure 2). Alternatively, you can select a work element and then click the **Details…** button.

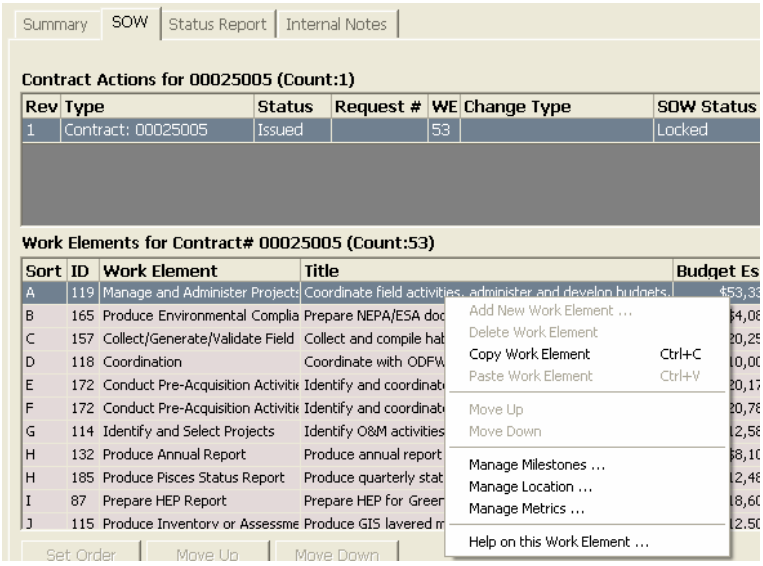


Figure 2

Once you're at the Work Element Details window, you no longer have to go back to the Contract Details window to select another work element. Instead, you can use the new dropdown list at the top of the window. Selecting another work element loads the milestones, location or metrics for that work element.

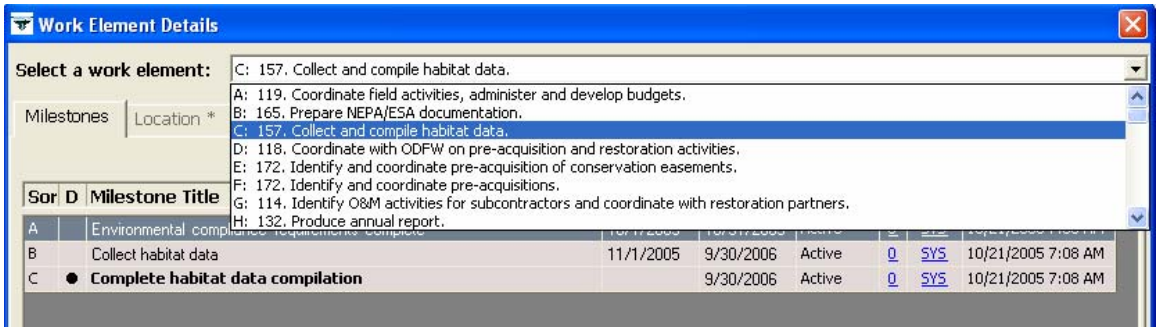


Figure 3

Understanding the Asterisks

If location or metrics data is required for the selected work element, an asterisk (✶) will appear next to the text on the corresponding tab. Likewise, if you're on the Location tab or the Metrics tab, Pisces will display an asterisk next to the work elements in the dropdown menu that require location or metric data (see Figure 3). Whether you like to focus on one work element and enter all its attributes, or focus on one attribute (such as location) and enter all the data for all work elements, these visual indicators should help make your data entry more efficient.

Entering Location Data

The current version of location functionality was designed primarily with data entry in mind. Our goal was to simplify capturing location data while at the same time leveraging existing data from BPA's internal GIS database. While it's not Google™ Earth, we hope you find it easy enough to use.

Location data is required in the following scenarios:

- For all issued contracts in Pisces having work elements requiring location data. This will include contracts from fiscal years 2005 and 2006. The current February 15, 2006 deadline is a one-time catch-up.
- Going forward, all contracts starting February 1, 2006 or later must provide location for those work elements that require it prior to the submission of a Statement of Work (SOW).

Understanding the Location Tab

The Location Tab comprises four main areas (see Figure 4):

1. Work Element Selection
2. Location Entry for entering, deleting, or linking locations
3. Location Details for entering notes or viewing guidance or location properties
4. Interactive Map

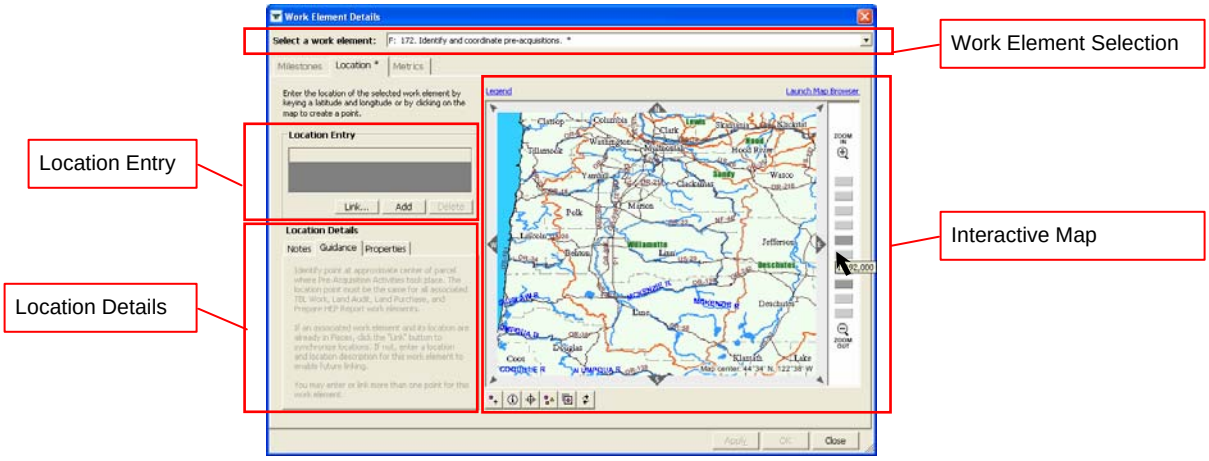


Figure 4

While the following pages describe how to do specific things such as adding a location, here are a few things to keep in mind when using this functionality in Pisces:

- Pisces displays specific guidance how to enter location for each work element. Some work elements don't require location at all, some are limited to a single point; others allow multiple points. For more information, see the "Accessing Guidance on Metrics and Location" section of this document.
- From the Location Tab, only those work elements with an asterisk (✶) next to them in the dropdown list require location.
- If you select a work element that does not require location, Pisces still displays the map, but hides the data input fields.
- At present, location data is limited to latitude/longitude pairs expressed in decimal degrees. Coordinates must be within the Columbia River basin. Valid latitude values are between 40.750265 and 52.300000, while valid longitude values are between -124.263432 and -108.872105. *Note*: you must include the minus sign for longitude.
- The display of features within the map is determined by the scale at which the map is drawn. Zooming in or out will activate some map features or elements, while others will be removed.
- The map window can be sized (smaller or larger) by using the sizing handles at each corner and mid-point of any edge (as with any Windows® application).
- For now, Pisces only supports entering simple points and not lines or polygons.
- There are three ways to add location data to your work element. See later sections of this document for instructions on each of these methods.
    - **Key in a latitude and longitude**.

      Use this option if you have one or more coordinates for your work element. The source could be from a GPS unit, Northwest Data Browser, or USGS Quad map.
    - **Plot a point directly on the map** (select the "Add a new location" tool and click on the map).
    - **"Link" to another location** already entered in Pisces.

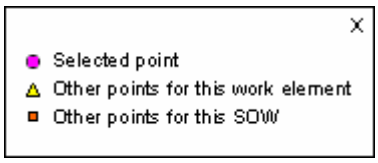
Understanding the Location Toolbar

Below are each of the Location toolbar buttons and their explanations.

- Adds a new point to the map. Once the point is plotted, the cursor reverts to the default "select" tool. When the new point is plotted, its coordinates are added to the Location Entry grid and automatically saved (there is no need to click Apply). Use the Notes tab to add other information, such as description.
- Queries the map or point and displays the associated information. This tool is a toggle, and remains active until clicked again, or another icon is selected.
- Centers the map. Once the new map is displayed, the cursor reverts to the "select" tool.
- Displays a map showing the extent of points for the current SOW. If no points have been placed, the default map is the extent of the project (based on subbasin). See the "Understanding the Different Point Indicators" section below for a description of the colored/shaped point icons.
- Toggles the underlying map on or off. Click once to hide the map; click again to display the map.
- Refreshes the map.

Understanding the Different Point Indicators

Clicking the "Legend" hyperlink above the map displays the following:



As additional points are added, the most recently added point will always be a magenta circle, and other locations for the same work element will be yellow triangles. Other location points for the current SOW will be displayed as orange squares.

For example, if you're on a work element with multiple locations and you've already plotted some locations for other work elements, your map should have one magenta circle, a few yellow triangles, and a few orange squares. While the orange squares aren't selectable since they belong to another work element, you can select one of the yellow triangles and you'll notice that the indicator immediately switches to the magenta circle.

To Navigate the Map

1. Zoom in and out using the vertical slider bar on the far right of the screen. You can place the mouse cursor over each "notch of the slider to see the scale factor.
2. Pan around using the buttons (, , , , , , , or) on the border of the map window.
3. Center the map using the center tool located on the toolbar on the bottom left edge of the map.

To Key in a Latitude and Longitude

1. Click **Add** to create a blank row in the Location Entry grid. This will also enable the tabs within the Location Details frame. Some work elements allow zero, one, or multiple locations, so pay careful attention to the guidance for each work element.
2. Type in the Latitude and Longitude. *Note*: Longitude must be entered with a minus (-) sign.

   Coordinates must be within the Columbia River basin. You will be prompted if the location entered is

outside of this bounding rectangle. Pisces requires location data in decimal degree format. If you have coordinates in degree, minute, second format, you can use one of the many conversion utilities available on the web such as http://www.fcc.gov/mb/audio/bickel/DDDMMSS-decimal.html.

3. Select the **Notes** tab and complete as much information as is available.
    a. **Capture Method**: is a drop down menu and describes how the location data was acquired.
    b. **Datum Used**: is also a drop down menu and describes the horizontal datum for the coordinates.
    c. **Capture Notes**: is a free-form field to enter more specific information about the method, date, conditions, etc. of the process of acquiring the location data.
    d. If you want to link to the location you just entered from other work elements, you must provide a **Description** as a minimum (more on linking locations later).
4. Click **Apply**. Pisces will save your data and plot the point on the map.

For additional points, repeat the steps above. To delete a coordinate pair, select the row and click **Delete**.

To Plot a Point Directly on the Map

1. Make sure the map is oriented (zoomed and centered appropriately).
2. Select the "Add a new location"  tool from the toolbar.
3. Click on the map. Pisces will plot the new point immediately and you should see a magenta circle appear where you clicked.

To Move a Point

1. Select a point that already exists.
   To select a point displayed as an orange square, you must first go to the work element that "owns" that point. If you're not sure which work element to go to, use the "identify" tool.
2. Using your mouse, double-click and drag the point to move it.

Alternatively, you can always directly edit the latitude and/or longitude values in the Location Entry grid.

To Link to Another Location

Location linking allows you to share locations among several work elements, even work elements from different contracts or projects. This feature saves time in that you don't have to re-enter the same points, and eliminates the possibility of incorrectly entering the coordinates, or trying to exactly identify the same point on the map.

For example, you might perform various work at a single location such as a fish production facility. Instead of re-entering the latitude and longitude of the facility for each work element, you can enter it once, give it a description, and then link to that location from all the other work elements.

1. From the Location tab, select a work element whose location data you already entered (for example, "Collect… Data").
2. Select the specific location that you want to make "linkable" from other work elements.
3. Select the **Notes** tab and enter a Description (for example, "Parkdale Fish Facility") if you don't already have one
4. Click **Apply**.
5. Select another work element whose work occurs in the same location. For example, "Mark/Tag…"
6. Click **Link**. Pisces displays the Add Linked Location… window (see Figure 5).

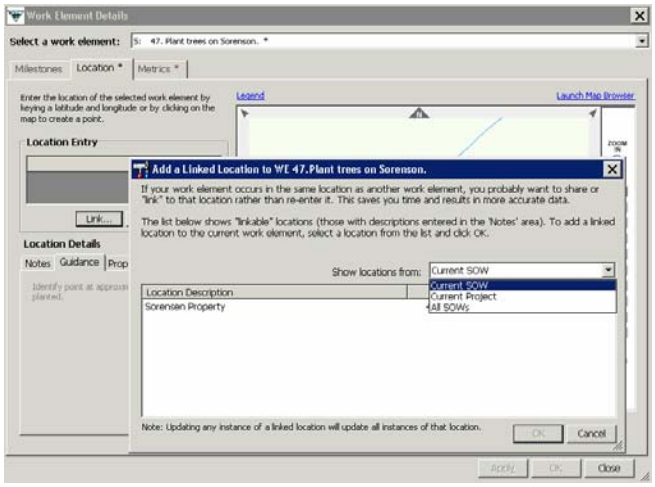


Figure 5

7. Select the location to which you want to link.

   If the location exists under a different contract or project, use the "Show locations from" dropdown list to adjust the scope of the list. *Caution*: Selecting "All SOWs" could take a long time to load.

8. Click **OK**.

Entering Metrics Data

While eventually we will ask contractors to provide planned metrics during creation of an SOW, in this release Pisces only supports entering of actual metrics or accomplishments for completed work.

With this release of Pisces, contractors will enter metrics (and location) data for all work elements in Pisces that require them. This catch-up exercise allows us to capture FY05 and some FY06 project accomplishments.

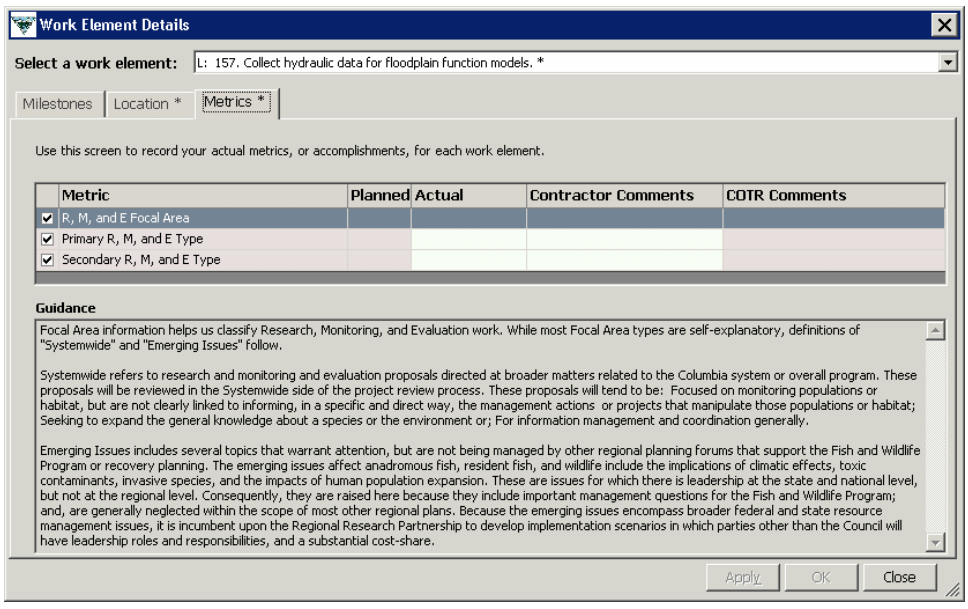


Figure 6

Understanding the Metrics Window

Here are a few things to keep in mind when entering Metrics:

- At present, only actual metrics are required. In the future (possibly starting in FY07), SOWs will include projected accomplishments via planned metrics.
- Metrics must be entered for all work elements with completed deliverables, irrespective of fiscal year. In other words, if you had a contract in work element format in Pisces during FY05 and/or FY06, please complete the metrics, even if the work elements are in multiple contracts.
- Pisces displays specific guidance how to enter metrics for each metric (see Figure 6 above).
- To view all guidance for all metrics by work element, see the "Accessing Guidance on Metrics and Location" section of this document.
- Some work elements have many metrics, yet not all will apply to your work. You can uncheck those metrics that don't apply.
- For those metrics which require a numerical value (e.g., number of miles of fence), the guidance indicates the level of precision required. Pisces enforces this precision; for example, it will prompt you if you don't provide enough numbers after the decimal point.
- For those metrics which require a choice from a list, Pisces provides a dropdown list.
- Similar to status reporting, Pisces provides fields for both contractor and Contracting Officer's Technical Representative (COTR) comments about each metric. You can use this space to explain the value you entered or perhaps your confidence in the value.
- While filling out a status report, Pisces will now prompt for actual metrics when you provide a Completed date for a deliverable milestone. You can cancel the prompt if you don't have the metric information readily available, but you must enter actual metrics before you can submit your status report.

Accessing Guidance on Metrics and Location

There are a number of places you can go to get more information on the rules or guidance for entering metrics and location data for each work element.

1. The work element background pages have been updated to include guidance on metrics and location data requirements. See for example the background page for "Plant Vegetation: http://www.efw.bpa.gov/contractors/work_categories/work_elements/we047.aspx.

   You may access all work element background pages (sorted by work category) at http://www.efw.bpa.gov/contractors/statementsofwork.aspx.
2. For the complete list of work elements and associated metrics, please refer to the metrics guidance dynamic report.
3. For the complete list of work elements that require location data points, please refer to the location guidance dynamic report.