EVM Desktop Customer Engagement

Enhanced Vegetation Management

User Guide

Together, Building
a Better California

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ArcGIS Online

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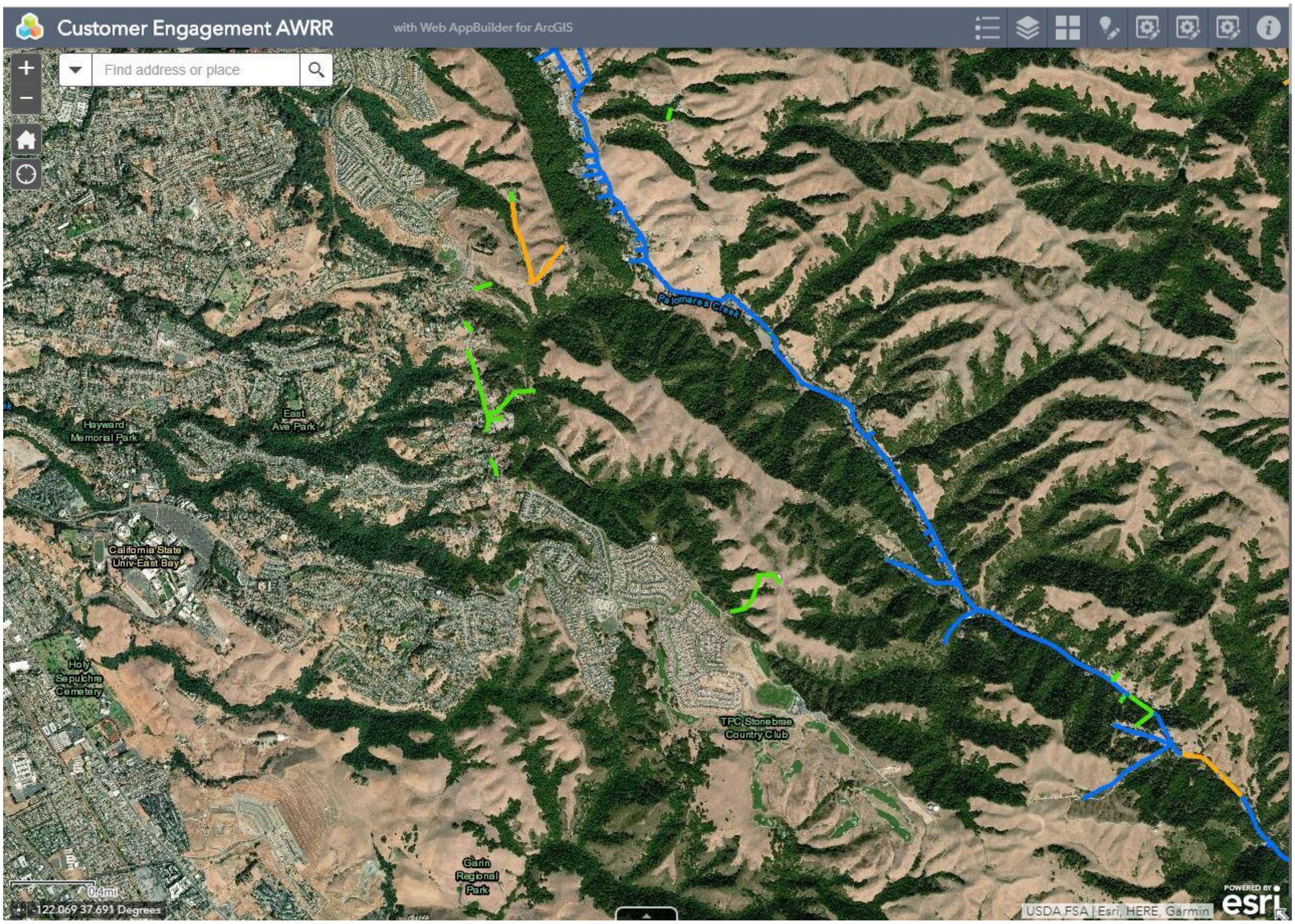
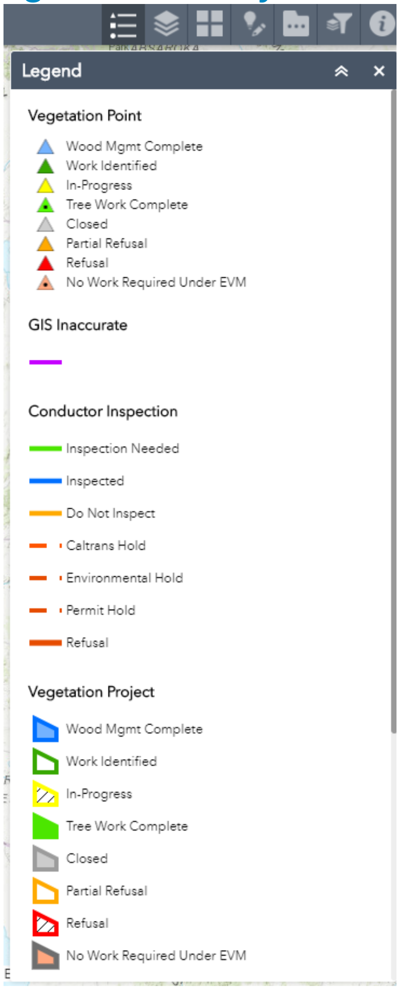
Launching the App

Use the Customer Engagement EVM application to view or update on a desktop computer. The app is best viewed using the Chrome browser.
The App can be found at the following link: **https://tinyurl.com/EVM-Customer-Editor**

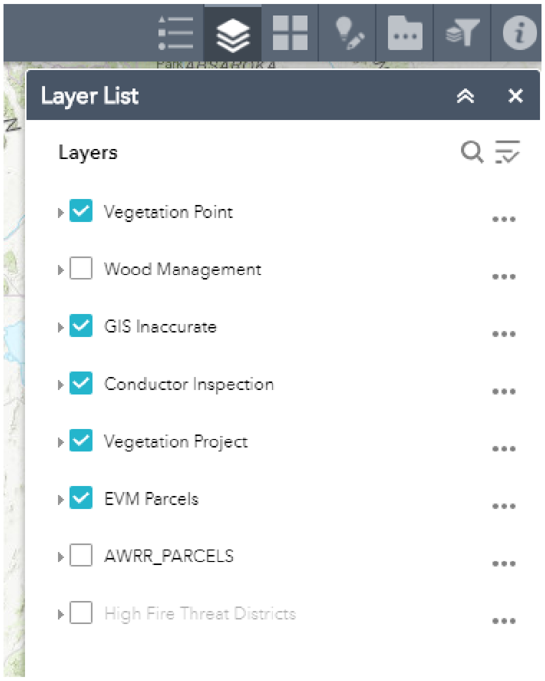


Widgets and Tools

Legend and Layer List



The Legend widget displays the map legend and the symbols and colors for each layer.

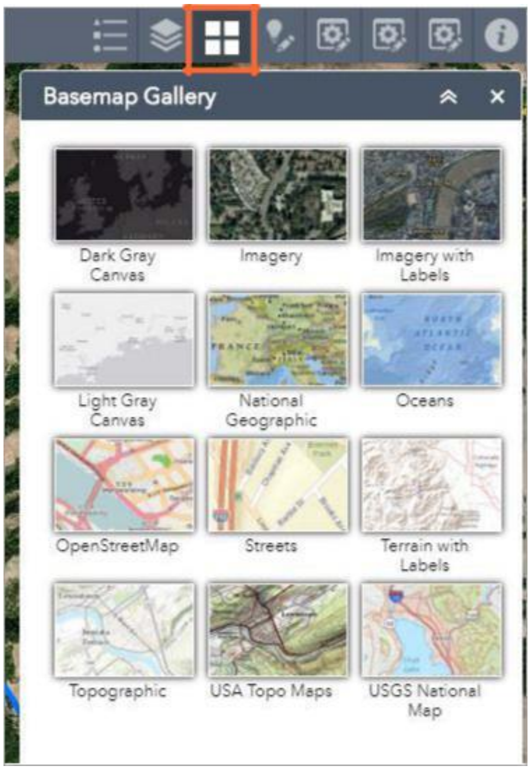


The Layer List widget displays all layers in the map.

- Click a layer checkbox to toggle it on or off.
- Click to expand a layer in the list to view its sublayers or subtypes.

Widgets and Tools

Basemap Gallery and Search



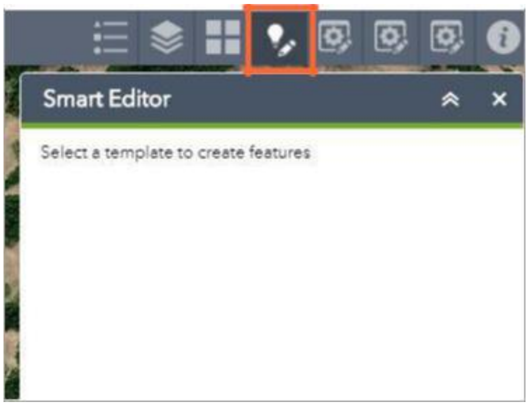
The Basemap Gallery widget provides the option to change the background of the map.

Use the Search widget to find locations or search features on a map.

Search options include Parcels, Vegetation Project or Point, ArcGIS World Geocoding and Service.

Widgets and Tools

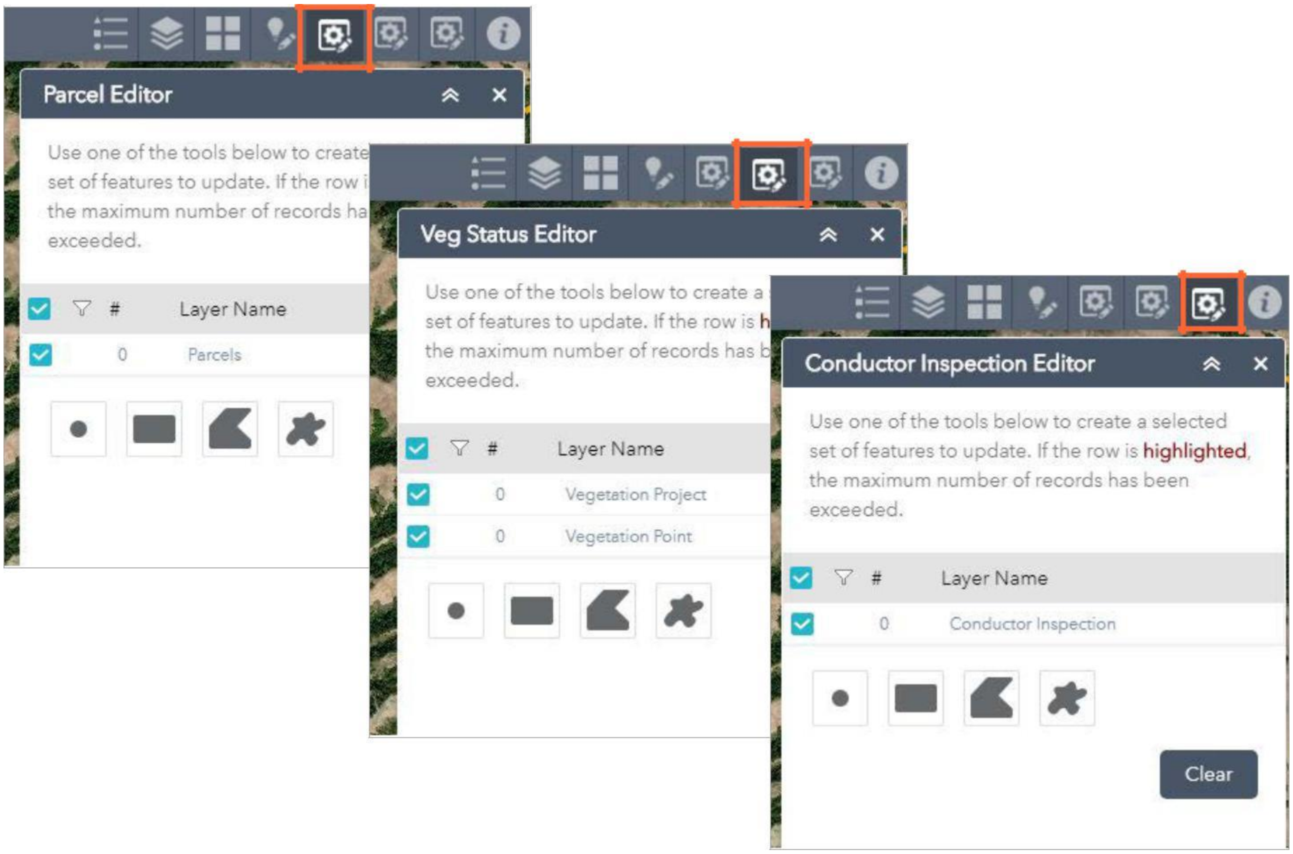
Smart Editor and Batch Attribute Editors



Use the Smart Editor to update attributes for an individual parcel. See instructions for (*Update Parcel Attributes*)

Use the Batch Attribute editors to update attributes for a data group at the same time. There are batch attribute widgets for Parcel, Veg Status and Conductor Inspection.

- See instructions for (*update batch attributes)*



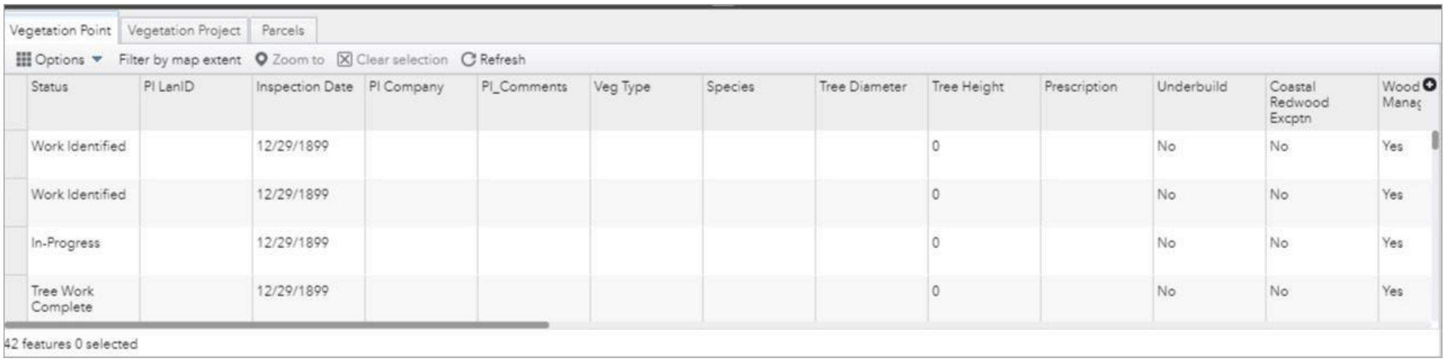
Widgets and Tools

Information Widget

The Information widget provides details for each item in the map.

Table View

Click the tab at the bottom-center of the screen to open Table View.


Vegetation Point | Vegetation Project | Parcels
Options | Filter by map extent | Zoom to | Clear selection | Refresh

Status	PI LanID	Inspection Date	PI Company	PI_Comments	Veg Type	Species	Tree Diameter	Tree Height	Prescription	Underbuild	Coastal Redwood Excptn	Wood Manag
Work Identified		12/29/1899						0		No	No	Yes
Work Identified		12/29/1899						0		No	No	Yes
In-Progress		12/29/1899						0		No	No	Yes
Tree Work Complete		12/29/1899						0		No	No	Yes

42 features 0 selected

The Vegetation Point, Vegetation Project and Parcel layers are viewable as a table.

See instructions for (*Filter Table View*).

Functions

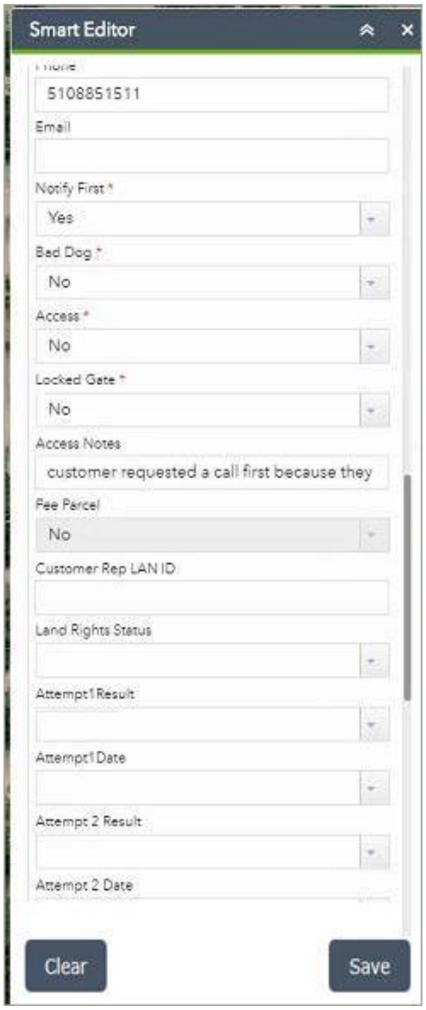
Functions

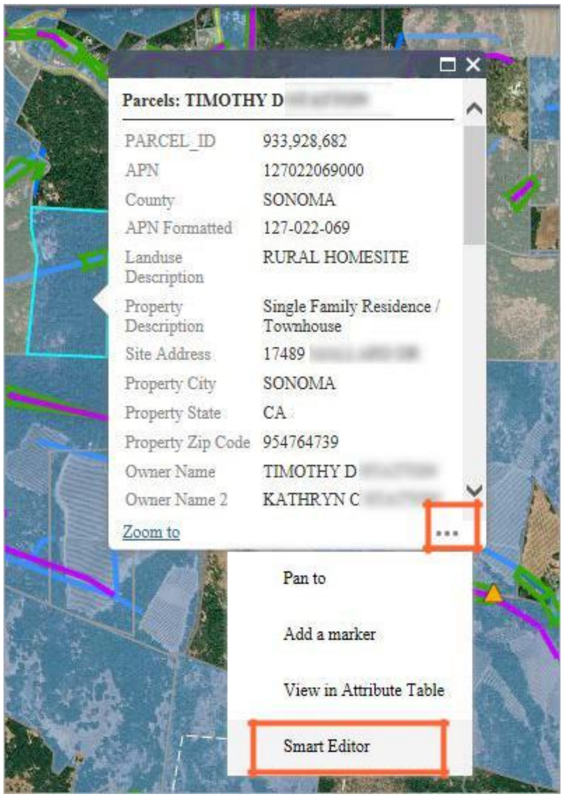
Update Parcel Attributes

Use the Smart Editor to update attributes for a selected parcel.

To update attributes:

1. Zoom in on the map and select a parcel.
2. Click the more icon •••, and select **Smart Editor**.
3. Edit attributes in the Smart Editor widget pane that opens. You can update fields that are not greyed out.





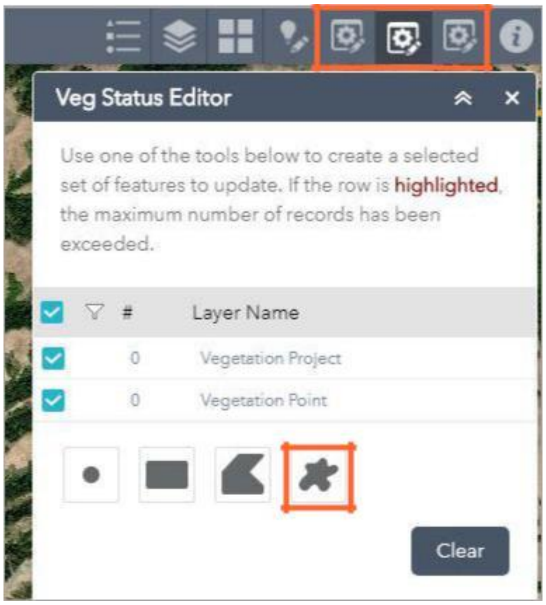
Functions

Update Batch Attributes

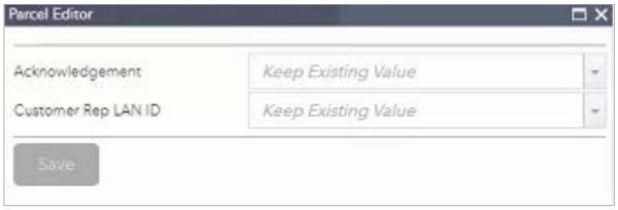
Use these options for updating the Parcel, Veg Status and Conductor Inspection attributes.

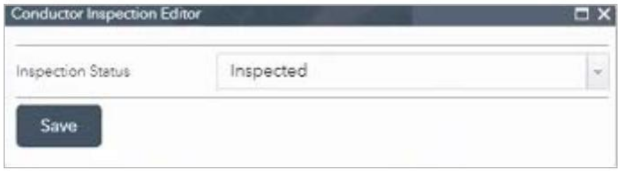
To update attributes:

1. Select a batch attribute widget to update.
2. Click a selection type. Each type draws a different shape on the map. The freeform selection tool is recommended.
3. On the **Veg Status Editor**, you can optionally select to modify a single view by ensuring the blue checkbox is selected for the desired view.
4. Draw on the map to select the features to update.
5. Update the desired attributes. Each widget has different attribute options.
6. Click **Save** to apply your changes.



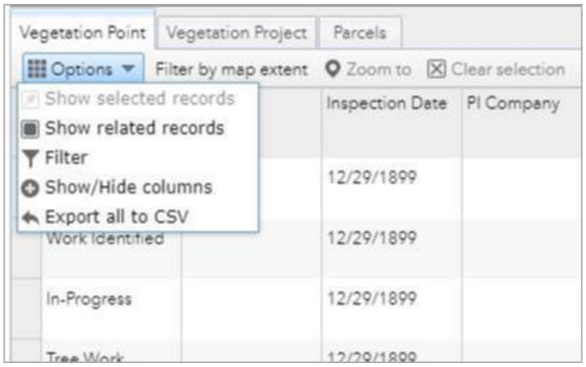
These are the batch attributes you can update for each view type.





Functions

Filter Table Data

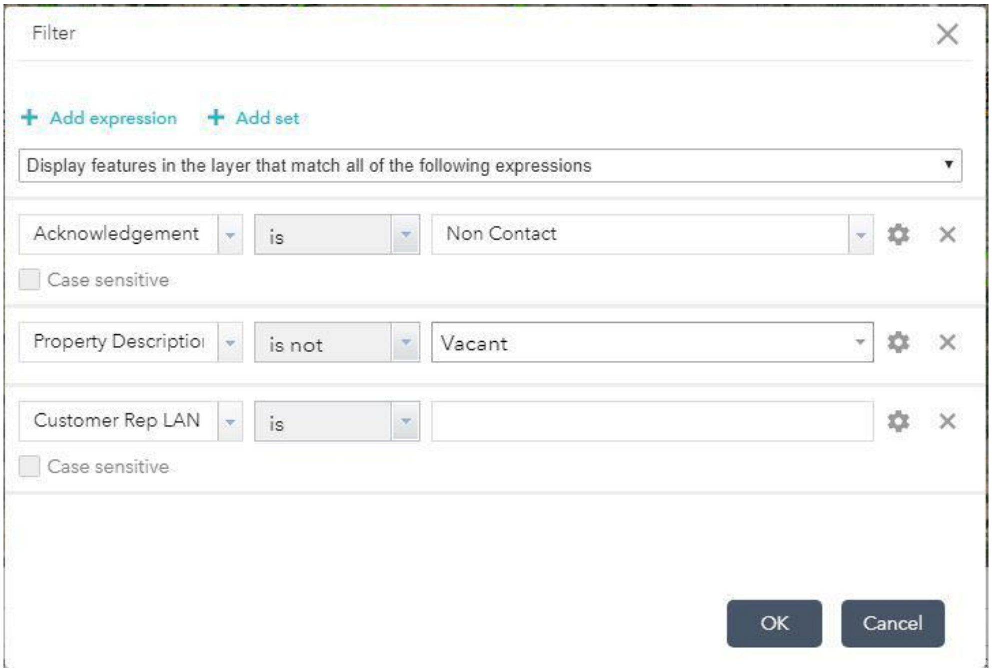


To open the filter view:

1. Select the desired layer view. Only one layer can be filtered at a time.
2. Click the **Options** button.
3. Select **Filter**.

To create a filter:

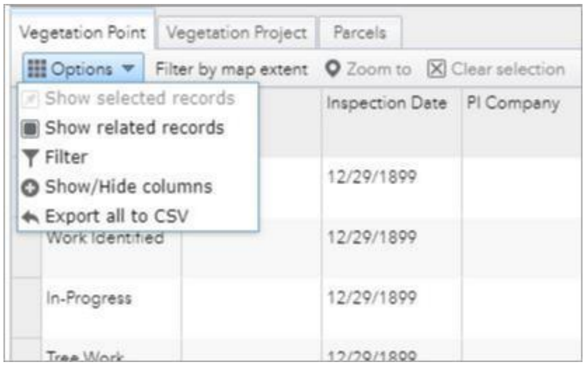
1. Click **Add expression**.
2. Select a Field from the first drop-down.
3. Select a filter Expression from the second drop-down.
4. Click the settings icon and select **Unique** to set the values of the search field.
5. Select the search term or value from the third drop-down.
6. Click **OK** to apply filter.
7. To clear the filter, click the delete icon in the filter window.



Functions

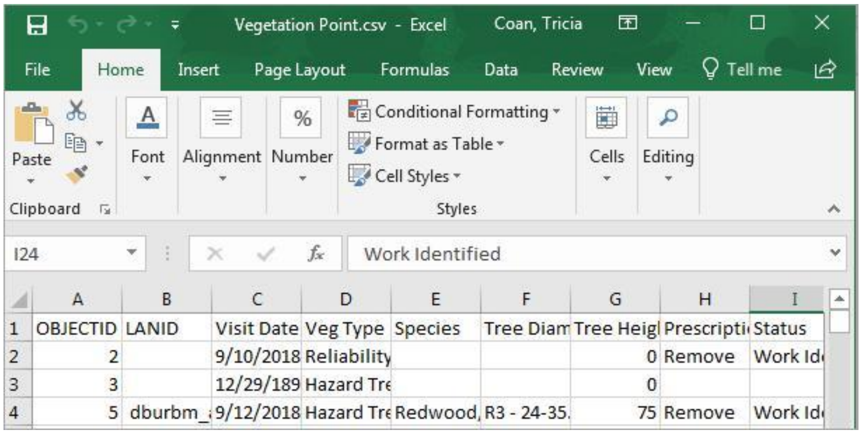
Export Table to CSV

Use the export feature to save a data file to import into an Excel Workbook.



To Export to CSV:

1. Click the **Options** button.
2. Select **Export all to CSV**.
3. Click **OK** when prompted to, **Export data to CSV file?**
4. Save the file to your computer and open in Excel.



Outcall Guidelines

Each non-contact will have 3 attempts made to reach the property owner
Attempts much be on 3 separate days (24 hours between attempts)
If customer has multiple phone numbers, try all to determine active numbers for 1st attempt
Use only active number(s) for 2nd and 3rd attempt
Research phone numbers in CC&B, Google, and/or Fastpeoplesearch.com
When leaving a message, please leave direct phone number for call back

Attempts will be logged in the Customer Non-Contact Follow Up Template (ArcGIS Collector beginning 9/28/18), focused on the highlighted columns
Please use drop downs in spreadsheet (do not type over) and return as received (do not move or delete columns)

FAILURE TO CATEGORIZE APPROPRIATELY CAN RESULT IN SAFEY RISK TO THE CREWS

Carefully record your customer interactions and attempts according to the directions below. If you have questions, seek clarity before entering into system.

Drop Down Definitions

Acknowledgment:
Field will be populated with Non Contact or Refusal if BES/LCE action is needed. No action is needed with this field, unless you engage a customer about the Work and they do not object or you are able to convert their Refusal to a Yes.

Drop down options are:
Yes
Non Owner
Not Attempted
Refusal
UNSAFE
Non Contact

Contact Name:
Property Owner Name

Email:
List email here, if customer would like to receive future Communication from PG&E via email

Owner Phone:
List accurate phone number(s) here

Customer Rep LANID:
Enter LAN ID

Land Rights Status:
Drop down options input by Land to inform appropriate script language Easement (1), Easement (2), Easement (3) Prescriptive (4)

Legal Input Needed (5)
Under Review

Attempt1:
Select from the drop down:
800# CB (only to be used by the LCE Central Veg team)
Connected (talked to property owner)
Incorrect Owner Contacted (No longer owner of property)
Left Message (left voicemail or message with someone other than property owner)
UTC (Phone numbers are disconnected)
No VM/VM Full (no ability to leave a message)
(blank)

Attempt1Date:
Enter date

Drop Down Definitions

Attempt2:
Select from the drop down:
800# CB (only to be used by the LCE Central Veg team)
Connected (talked to property owner)
Incorrect Owner Contacted (No longer owner of property)
Left Message (left voicemail or message with someone other than property owner)
UTC (Phone numbers are disconnected)
No VM/VM Full (no ability to leave a message)
(blank)

Attempt2Date:
Enter date

Attempt3:
Select from the drop down:
800# CB (only to be used by the LCE Central Veg team)
Connected (talked to property owner)
Incorrect Owner Contacted (No longer owner of property)
Left Message (left voicemail or message with someone other than property owner)
UTC (Phone numbers are disconnected)
No VM/VM Full (no ability to leave a message)
(blank)

Attempt3Date:
Enter date

Outcome Status:
Select from the drop down:
Remained Non-Contact (3 attempts to reach property owner and no connect or call back) Remained Hard Refusal (engaged customer but objected to the work; property owner is ok with only part of the work; property owner requests a visit from PI/ Arborist; property owner would like to be onsite for work – will need to schedule at a later date) UTC (Unable to Contact: research provided no working numbers or ability to leave voice mail) Converted (engaged property owner and did not object to any of the work – no additional follow up needed)
If customer would like to keep the wood, choose N in Debris Removal drop down and add direction to Access Notes

Drop Down Definitions

(blank)

Outcome Date:
Enter date outcome determined

Comments:
Open Field to document conversation – direction for tree crew should go in Access Notes

Access Notes:
Open Field to document access notes and any direction for tree crew (i.e. keep and stack logs) Note: these are the only comments tree crew will see in the ArcGIS App

Customer Inquiry*
Select from the drop down:
877# general question
Email general question
CCO general question
877# escalation
Email escalation
CCO escalation
(blank)
*For use by the central team to note additional interaction
Add to comments if escalation:
Threatened (one of the following) violence, CPUC, elected, lawsuit, officer, media, organize against.

Customer Inquiry Date:
Enter date of inquiry

Refusal Letter**
Select from open drop down based on Land Rights Status column entry:
Sent Letter 1 (Land Rights 1, 2, 3)
Sent Letter 2 (Land Rights 4)
Sent Letter 3 (Land Rights 5)
Not Needed
**To be populated following direction from Land/Law

Refusal Letter Mailing Date:
Enter date refusal letter was mailed to customer

Wood Management:
Select Y if customer would like debris removed (this is the default for the Wildfire Safety Work) Select N if customer would like to keep debris