

# EVM Desktop Customer Engagement

## Enhanced Vegetation Management User Guide



Together, Building  
a Better California

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# Overview and Tutorials

ArcGIS Online

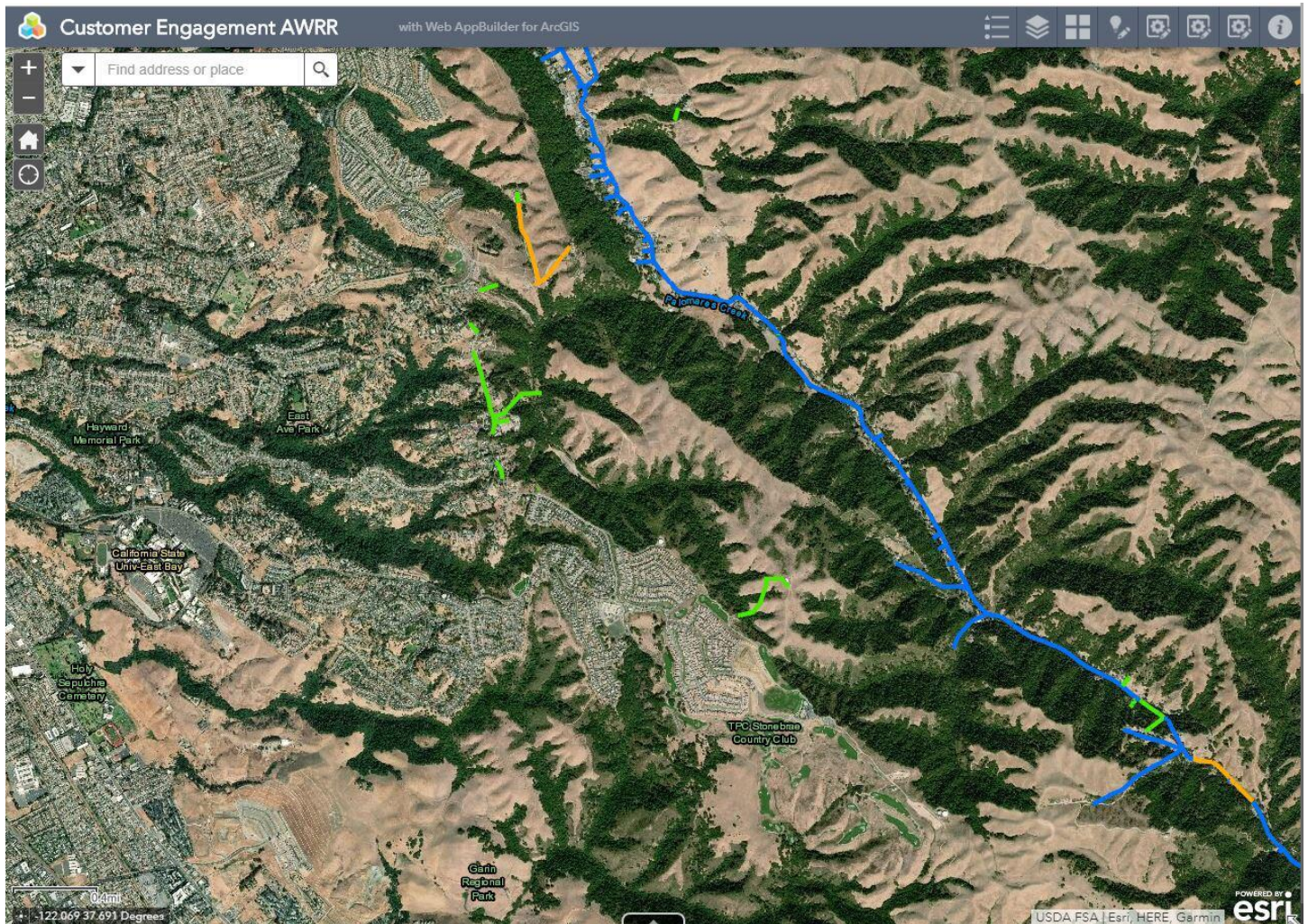
# Widgets and Tools

## Widgets and Tools

### 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.

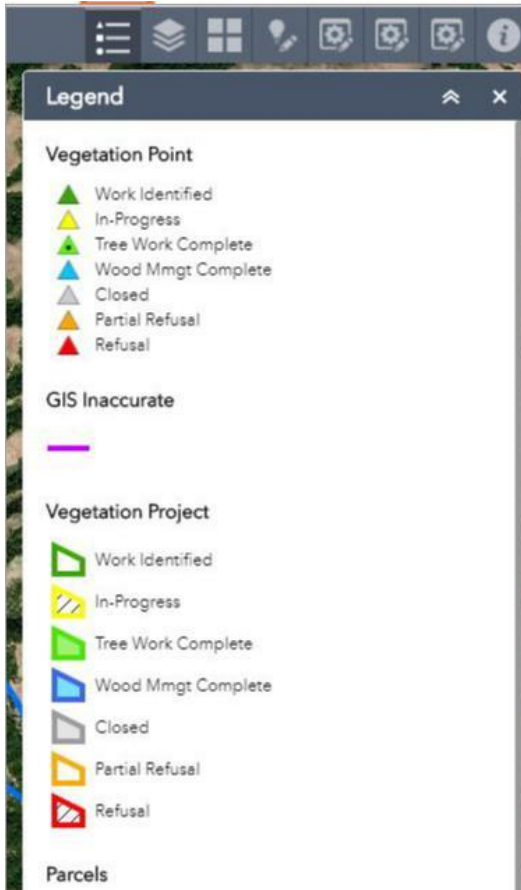
The App can be found at the following link: <https://tinyurl.com/EVM-Customer-Editor>





# Widgets and Tools

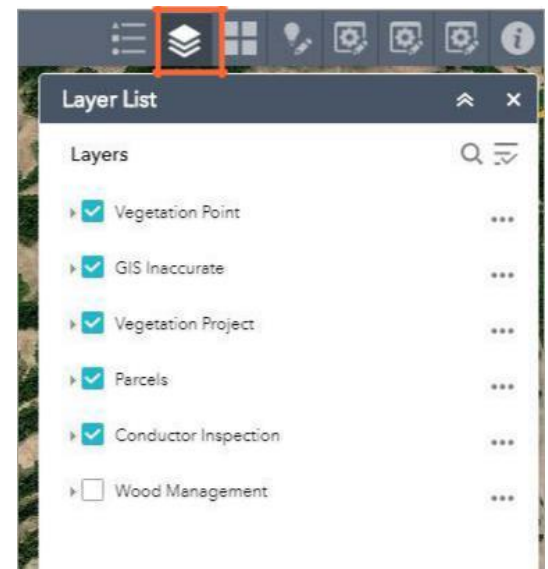
## Legend and Layer List



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

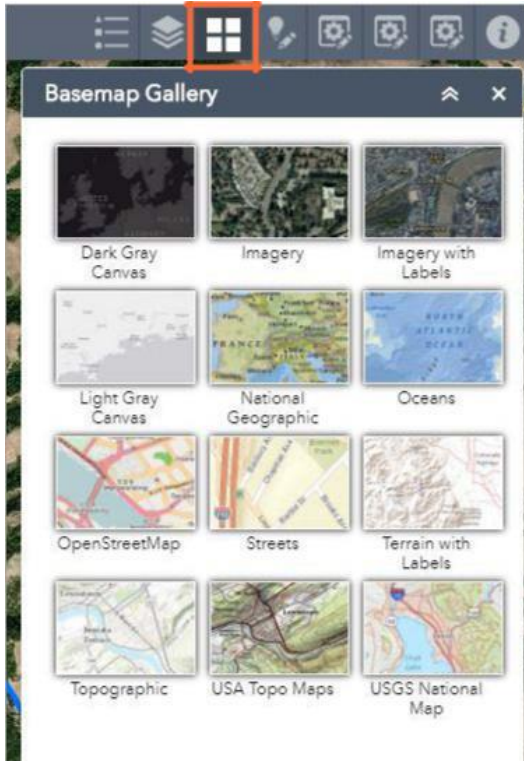
The Layer List widget displays all layers in the map.

- 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.

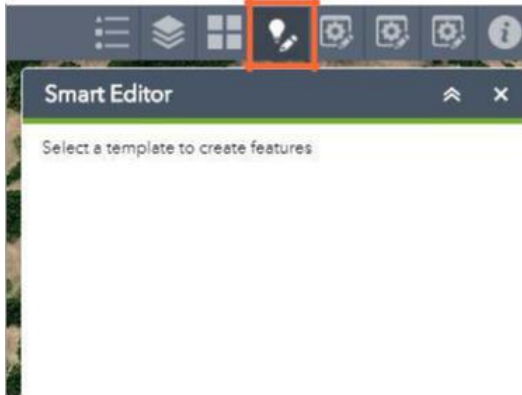
Use the Search widget to find locations or search features on a map.

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



# Widgets and Tools

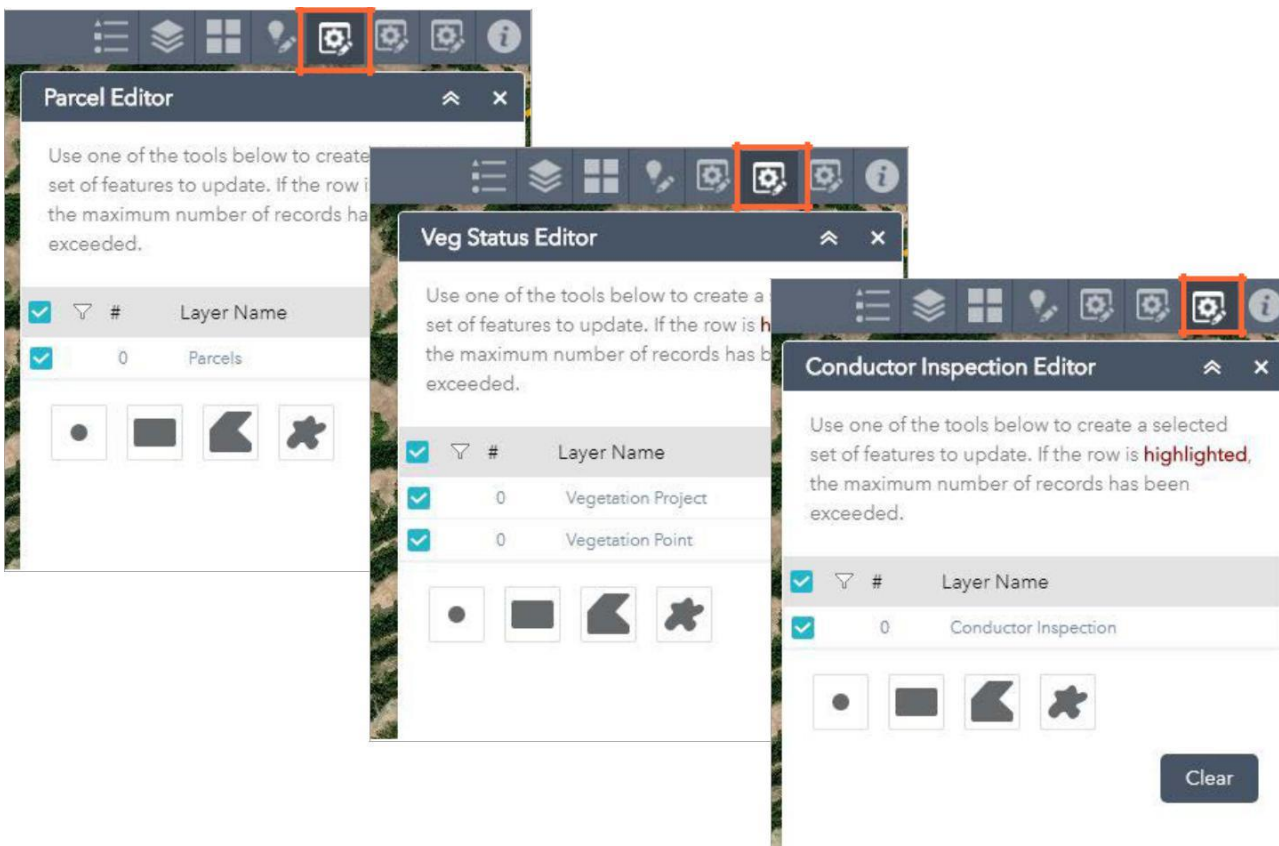
## Smart Editor and Batch Attribute Editors



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

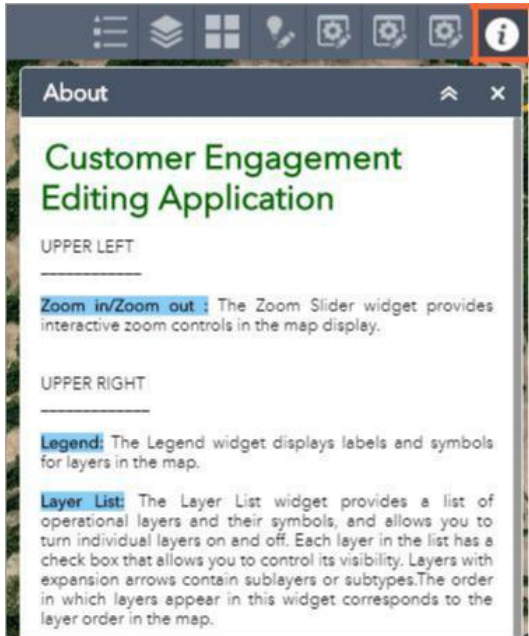
Use the Batch Attribute editors to update attributes for a data group at the same time. There are batch attribute widgets for Parcel, Veg Status and Conductor Inspection.

- See instructions for (*update batch attributes*)



# Widgets and Tools

## Information Widget



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



# Widgets and Tools

## 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 LandID	Inspection Date	PI Company	PI_Comments	Veg Type	Species	Tree Diameter	Tree Height	Prescription	Underbuild	Coastal Redwood Excpn	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

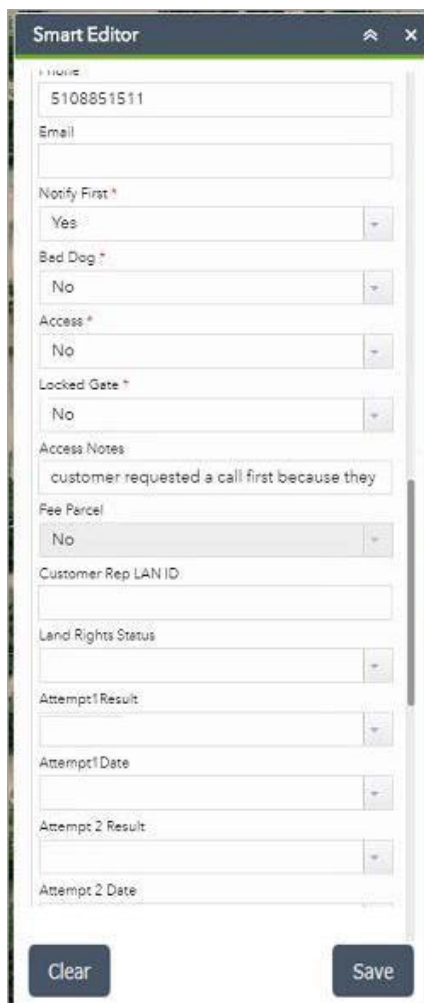
## Functions

### Update Parcel Attributes

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

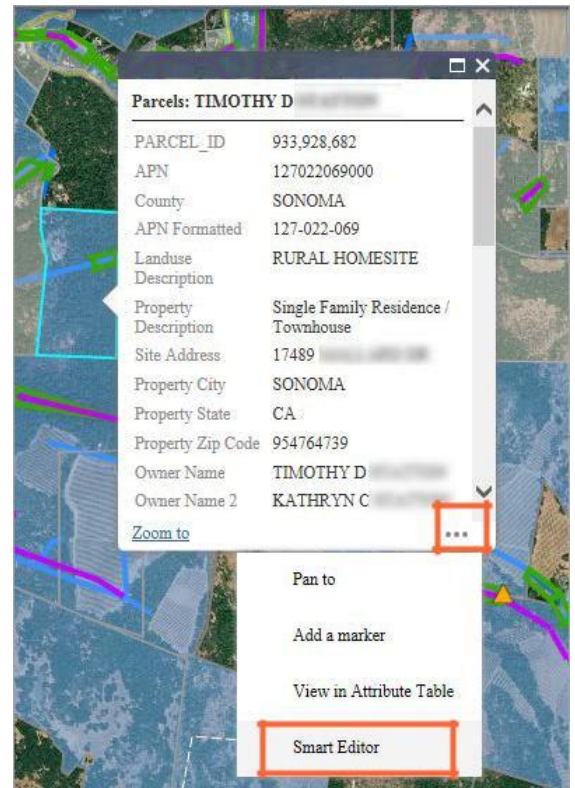
To update attributes:

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.



The Smart Editor widget pane is a vertical form with a title bar 'Smart Editor' and a close button. It contains the following fields and controls:

- Parcel ID: 5108851511
- Email: (empty text field)
- Notify First \*: Yes (dropdown menu)
- Bed Dog \*: No (dropdown menu)
- Access \*: No (dropdown menu)
- Locked Gate \*: No (dropdown menu)
- Access Notes: customer requested a call first because they
- Fee Parcel: No (dropdown menu)
- Customer Rep LAN ID: (empty text field)
- Land Rights Status: (empty text field)
- Attempt 1 Result: (empty text field)
- Attempt 1 Date: (empty text field)
- Attempt 2 Result: (empty text field)
- Attempt 2 Date: (empty text field)
- Buttons: Clear and Save



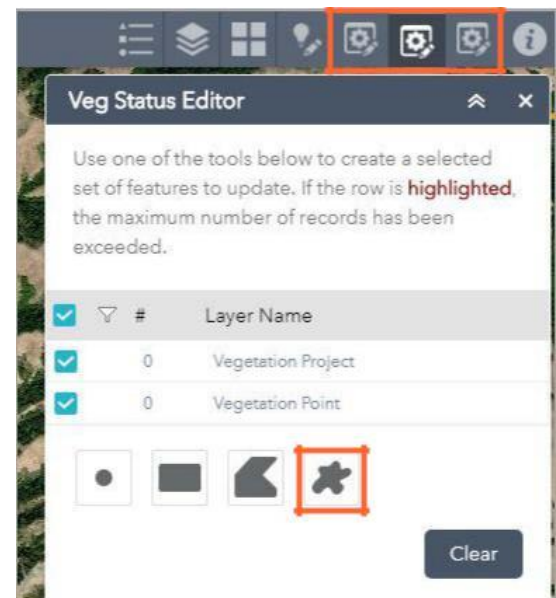
# Functions

## Update Batch Attributes

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

To update attributes:

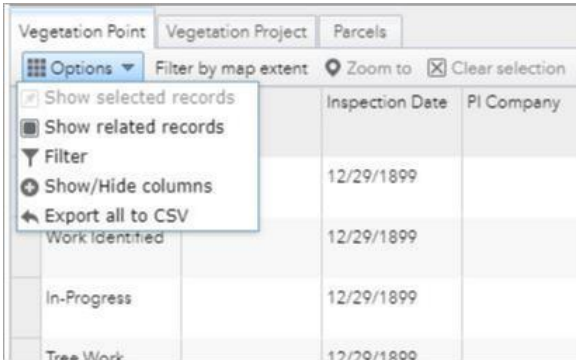
1. Select a batch attribute widget to update.
2. Click a selection type. Each type draws a different shape on the map. The freeform selection tool is recommended.
3. On the **Veg Status Editor**, you can optionally select to modify a single view by ensuring the blue checkbox is selected for the desired 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





The screenshot shows a table with columns: Vegetation Point, Vegetation Project, Parcels, Inspection Date, and PI Company. A context menu is open over the 'Options' button, showing options: Show selected records, Show related records, Filter, Show/Hide columns, and Export all to CSV. The table data includes rows for 'Work Identified', 'In-Progress', and 'Tree Work', all with an 'Inspection Date' of 12/29/1899.

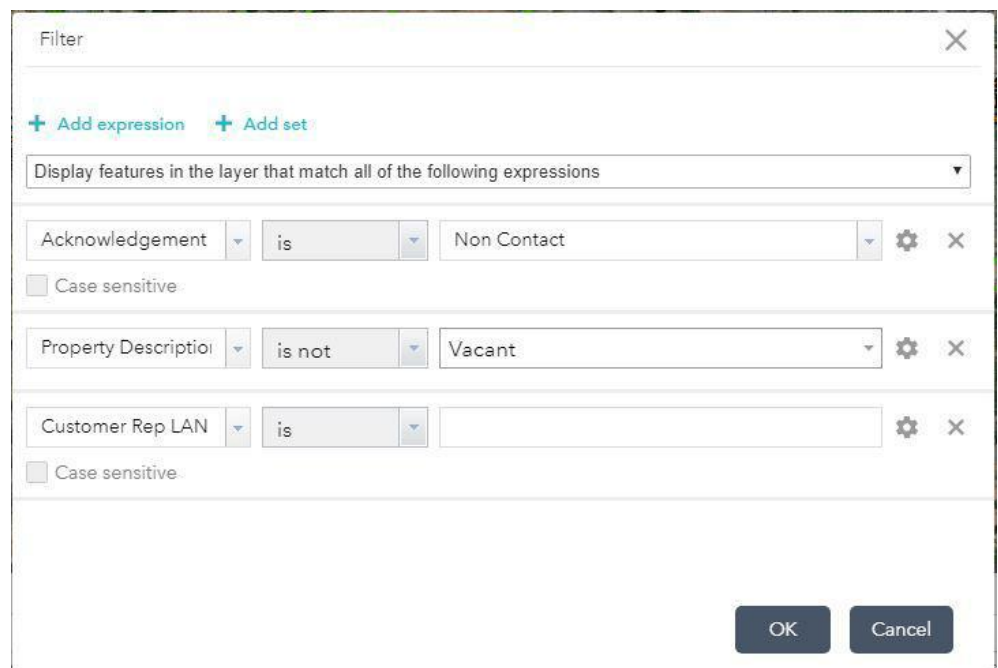
Vegetation Point	Vegetation Project	Parcels	Inspection Date	PI Company
Work Identified			12/29/1899	
In-Progress			12/29/1899	
Tree Work			12/29/1899	

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.



The Filter dialog box shows a list of expressions. The first expression is 'Acknowledgement is Non Contact'. The second expression is 'Property Description is not Vacant'. The third expression is 'Customer Rep LAN is'. Each expression has a settings icon (gear) and a delete icon (X). The 'Case sensitive' checkbox is unchecked for each expression. At the bottom, there are 'OK' and 'Cancel' buttons.

Filter

+ Add expression + Add set

Display features in the layer that match all of the following expressions

Acknowledgement is Non Contact

☐ Case sensitive

Property Description is not Vacant

☐ Case sensitive

Customer Rep LAN is

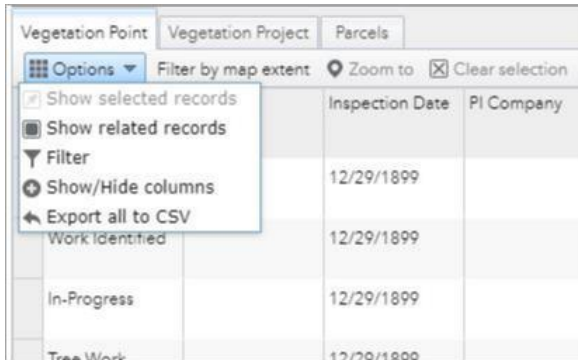
☐ Case sensitive

OK Cancel

# Functions

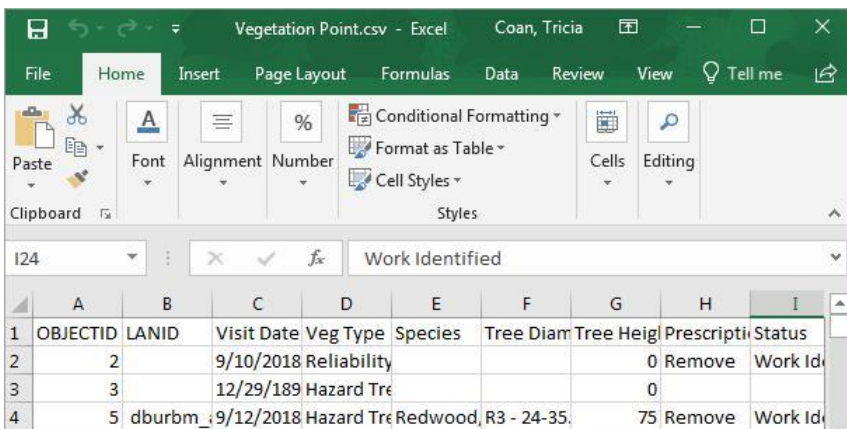
## Export Table to CSV

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.



	A	B	C	D	E	F	G	H	I
	OBJECTID	LANID	Visit Date	Veg Type	Species	Tree Diam	Tree Heig	Prescripti	Status
2	2		9/10/2018	Reliability			0	Remove	Work Id
3	3		12/29/189	Hazard Tre			0		
5	5	dburbm_	9/12/2018	Hazard Tre	Redwood, R3 - 24-35		75	Remove	Work Id



# Outcall Guidelines

Each non-contact will have 3 attempts made to reach the property owner  
Attempts must 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 SAFETY 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/VMM 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