



# One VM VMI Reference Guide



**Audience:** PG&E internal VMIs and external VMIs

**Application:** One VM Mobile only

**Description:** This guide provides an overview of how to navigate Service Appointments (SA) between the **Salesforce Field Service (SFS)** and **Lemur Pro** apps.

### Key Things to Know:

- Every morning prior to inspecting, ensure you have good connectivity and close, re-open, refresh/resync your apps. Download your service appointments and verify the SA's appear in **SFS > My Work** before leaving.
- To add or edit a parcel contact, pin either a span or veg point in **Lemur Pro**, select a parcel, then select **Manage Parcel & Contacts** from the **ellipsis** menu in the upper right corner of your screen. **SFS** will open and you may add new contacts or scroll through and edit existing contacts.
- For most open text or comment fields in One VM do not use the following special characters: ~ ` ! @ # \$ % ^ & \* ( ) \_ - + = { } [ ] ; : " " " , . < > / ? | to avoid data errors. **Special characters may be entered in open text fields in the Inspect and Prescribe flows only. Do NOT use backslash (\) in any field in One VM.** The maximum number of alpha characters is 255.



For additional One VM mobile and desktop job aids, visit the [One VM Project Info Hub](#) or the One VM folder in [Core Share](#).

## Creating a New Veg Point

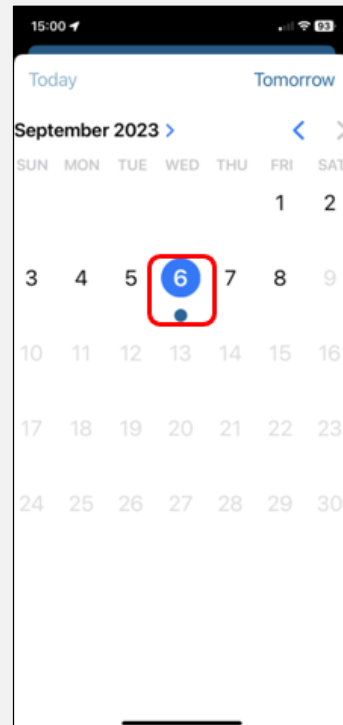
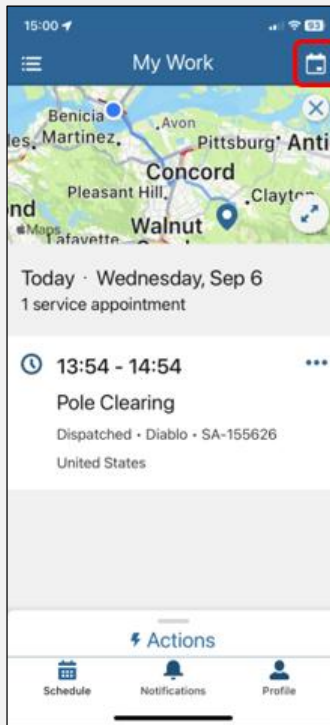
1. Open **Salesforce Field Service (SFS)** on your mobile device.
2. If prompted, open the **Salesforce Authenticator**, then select **Approve**. Do not confuse **Salesforce Authenticator** with Microsoft Authenticator, which may also appear on your device.

**NOTE:** Using Face ID instead of the passcode on your iPhone is recommended. To enable this, open **Settings** and select **Face ID & Passcode**. Under **Other Apps**, toggle on **Salesforce Field Service**.


To extend Auto-Lock, open **Settings**, select **Display & Brightness** and set **Auto-Lock** to 5 minutes.

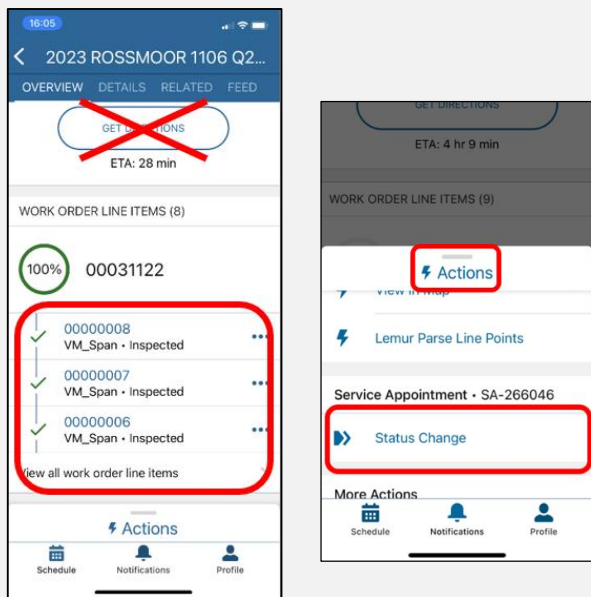


3. In **SFS**, select the **Calendar** icon in the upper right corner. Select dates with blue dots to view **Service Appointments (SA)** assigned on those dates. (You are able to see 3 weeks prior to and 1 week after the current date).

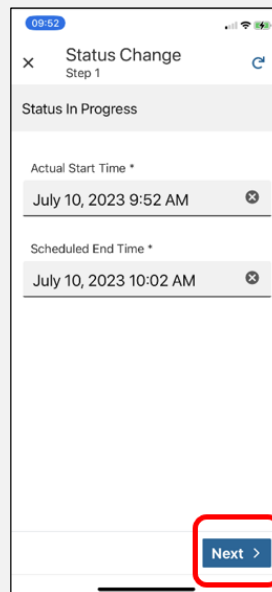


4. The selected **SA** appears on your screen and displays the **Work Order Line Items (WOLIs)**. Select the **Actions** tab and tap **Status Change**.

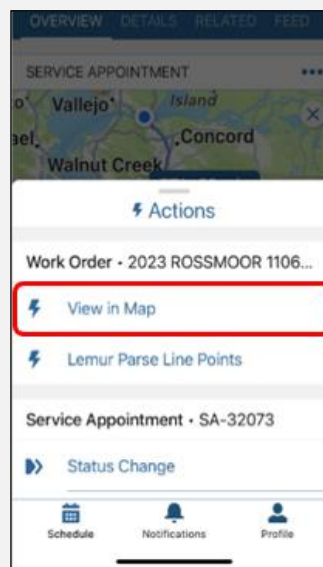
 **NOTE:** Do NOT select Get Directions in SFS.



5. On the **Status Change** screen, select **In Progress** and input the **Actual Start Time** and **Scheduled End Time**. Make sure to allow enough time to complete the **SA**. Select **Next**.



6. Select the **Actions** tab again and select **View in Map**. **Lemur Pro** automatically opens and zooms the map to the area of the **SA**. Spans in the **SA** will be **bold green**.



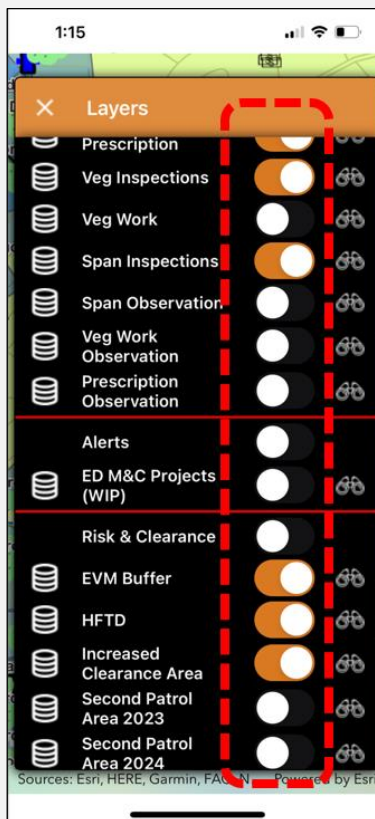
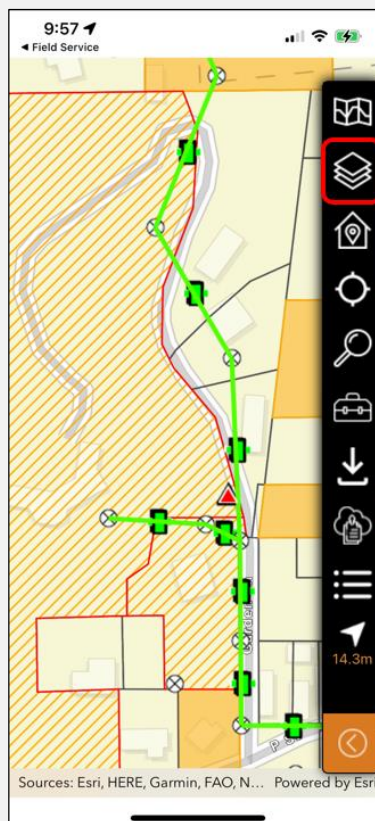
Make sure you are looking at the **bold green spans** on the map. These spans represent your **Service Appointment**.

7. Once the map appears in **Lemur Pro**, select the **Layers** icon and toggle **ON** the following layers:

- My Work Section
  - My Work
- Reference Work Section
  - Veg Points
  - Veg Points Prescription
  - Veg Inspections
  - Span Inspections
- Risk & Clearance Section
  - EVM Buffer (**NOTE:** There is an EVM layer that is always on and shows narrow polygons. This EVM Buffer option shows oversized layers and is optional)
  - HFTD
  - Increased Clearance Area
  - Fire Responsibility Areas
- Electric Infrastructure Section
  - Spans
  - Primary Overhead Conductors
  - Support Structures
  - Substations
  - Found/Misaligned Conductor
- SSD Section
  - SSD
  - Capacitor
  - Fuse
  - Recloser
  - Regulator
  - Switch
- Admin Boundaries Section
  - Parcels
  - PG&E Parcels
  - Access Roads
  - Cities

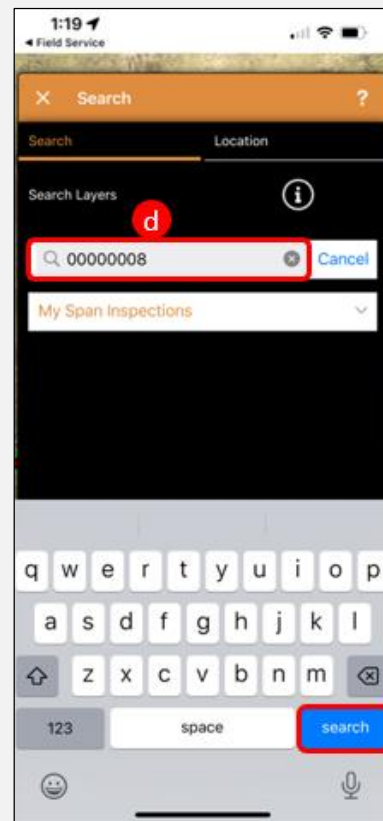
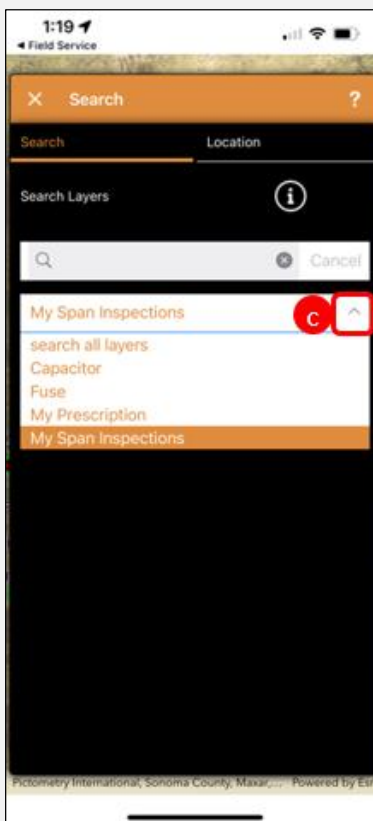
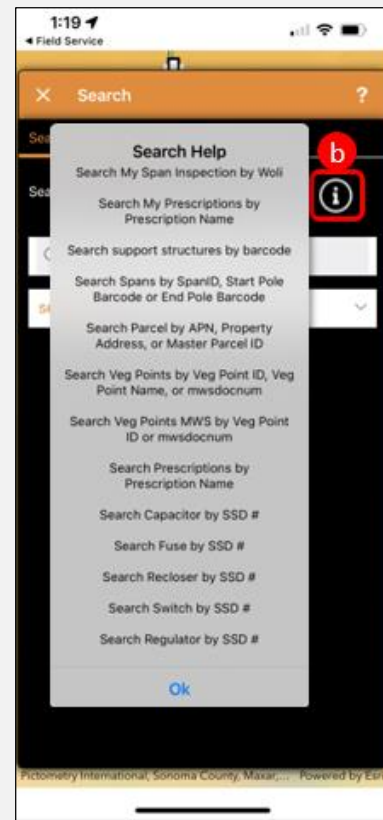
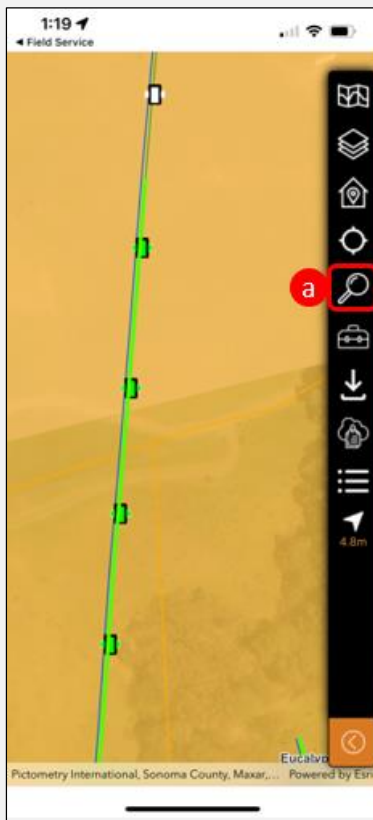
Depending on the project, you may want to add other layers such as CZ, Environmental Agency, etc. Tap the X icon in the upper left-hand corner of the layers list when finished.

**NOTE: Enterprise Alerts**, which used to be a layer that could be toggled OFF/ON is **now always on**. These alerts display important Enterprise-wide safety alerts. This layer is distinct from Parcel Alerts which appear on the parcel layer and have notifications like NF- Notify Customer, BD- Bad Dog, and so forth.

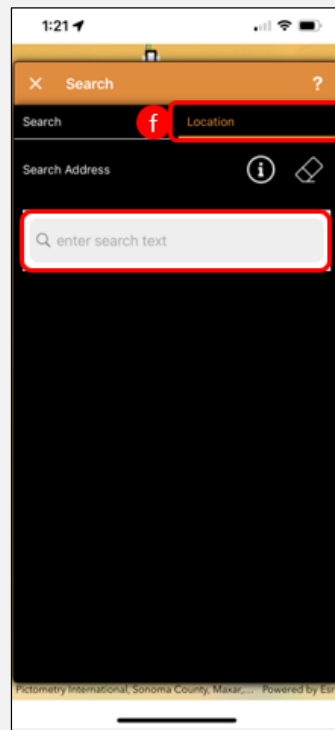
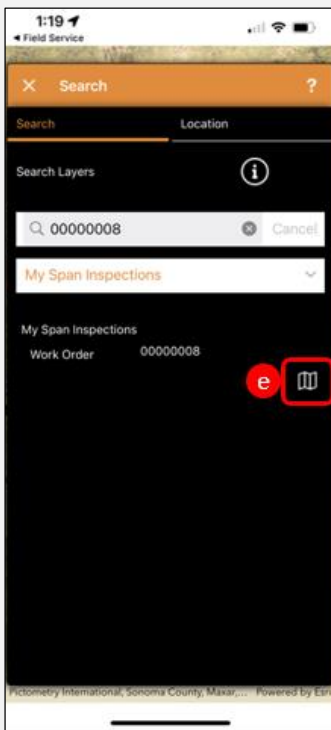


NOTE: **Lemur Pro** also allows users to search layers that are toggled on. To do so:

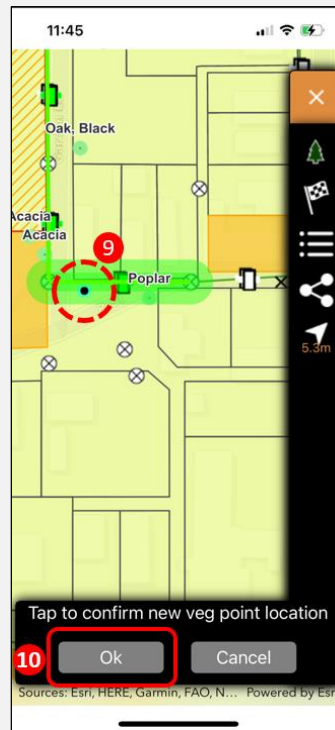
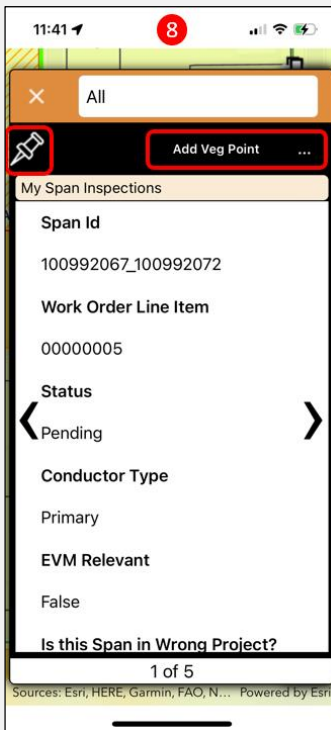
- a. Select the **magnifying glass** from the menu bar.
- b. Tap the **Search Help** icon to display instructions based on item type.
- c. Use the drop-down arrow to select a layer. This list will only display layers that are toggled on.
- d. Enter an item in the search bar then tap search.



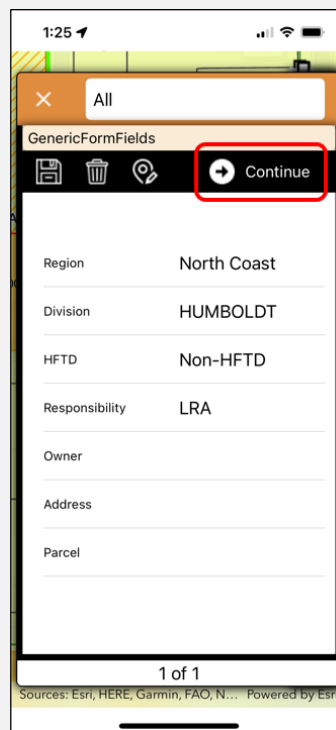
- e. Search results appear below. Tap the map icon to open the item detail page.
- f. Search **Addresses** through the **Location** tab.



- 8. To add a veg point in **Lemur Pro**, select a **Span**. Tap the thumbtack icon in the upper left of the screen to **Pin the Span**, then select **Add Veg Point**.
- 9. Place the veg point on your map by tapping on the appropriate area.
- 10. Select **Ok** to confirm the new veg point location.



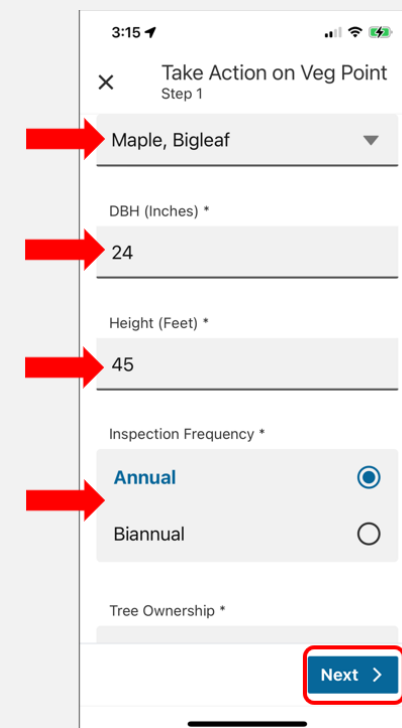
11. Select **Continue** on the pop-up information page. **SFS** will open automatically.



12. **SFS** opens to **Take Action on Veg Point**. The form will populate to generate the veg point description. **Enter** the details for the work to be prescribed, including:

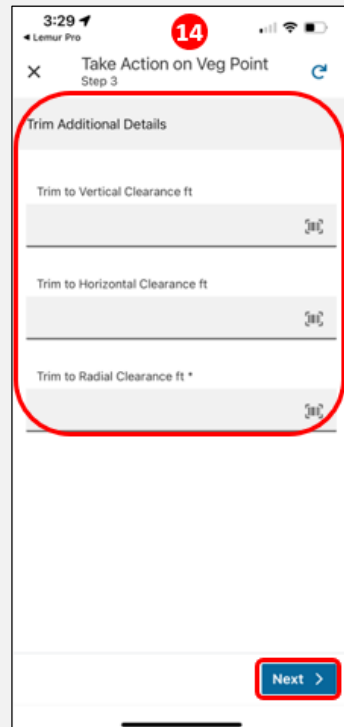
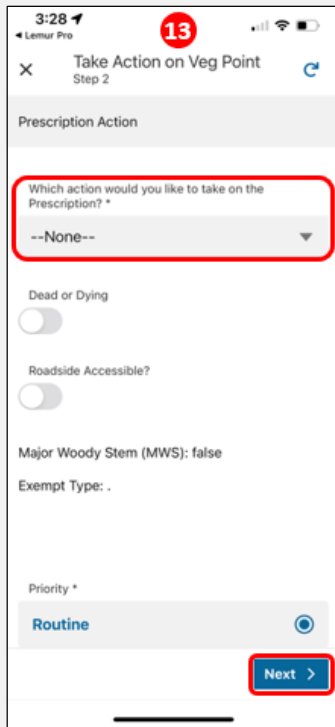
- Tree Type
- DBH
- Height
- Inspection Frequency (Annual or Bi-annual)
- Tree Ownership
- Directions
- Comments
- A street address if one is not pre-populated

Then select **Next**.



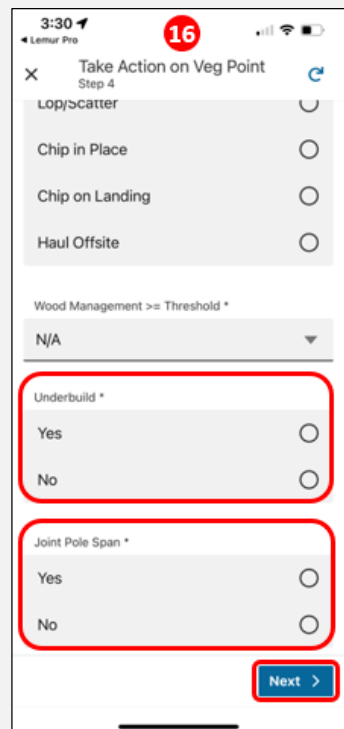
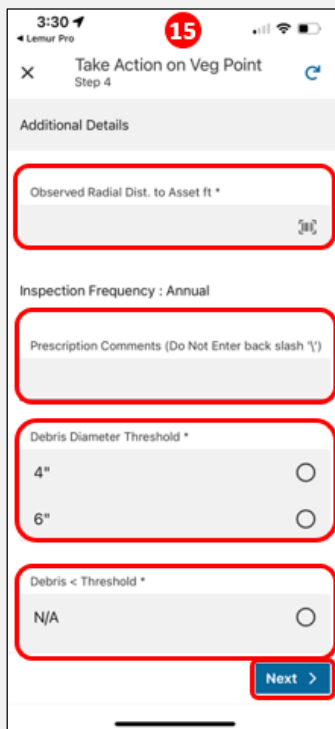
13. Use the drop-down arrow to select a **Prescription** (other than No Work). Select **Next**.

14. Fill in **Trim Details**. Select **Next**.



15. Enter the **Observed Radial Distance** and any **Prescription Comments**. Select **Debris Diameter Threshold** and select **Debris < Threshold**.

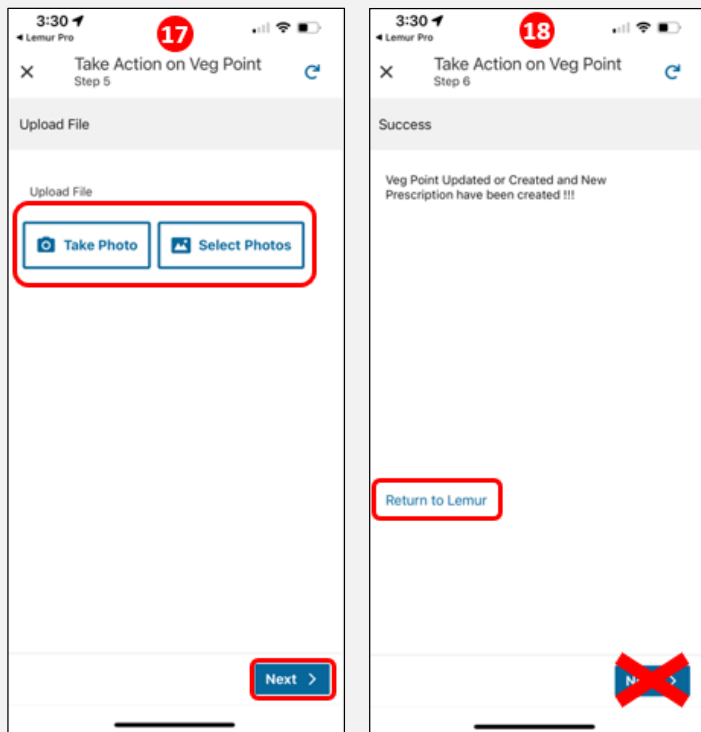
16. Select **Underbuild** (Y/N) and **Joint Pole** (Y/N). Select **Next**.





17. Upload file (photos or other attachments). Select **Next**.

18. The **Success** screen appears. Select **Return to Lemur**, do NOT select Next.



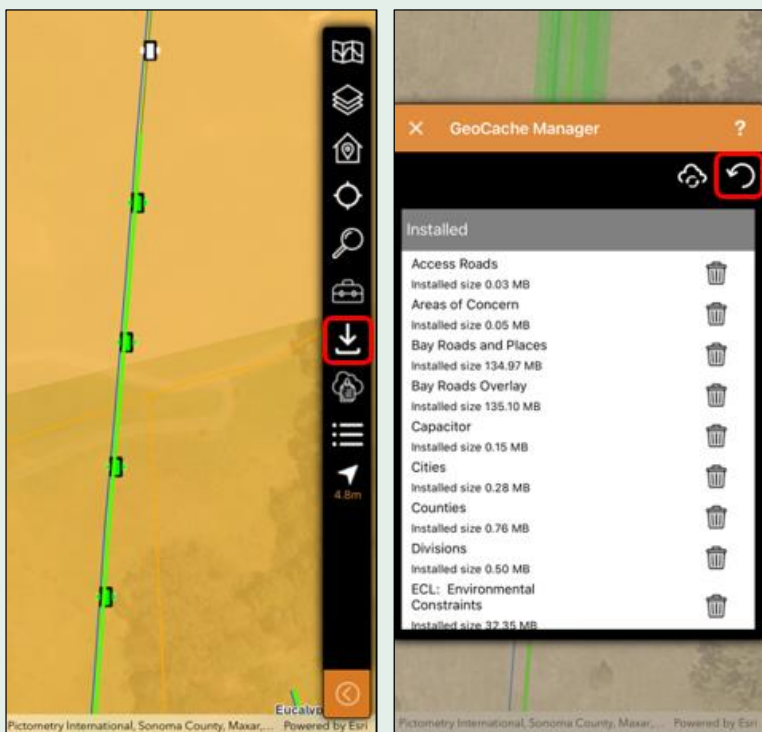
19. Veg point prescriptions update as blue triangles in **Lemur Pro**.





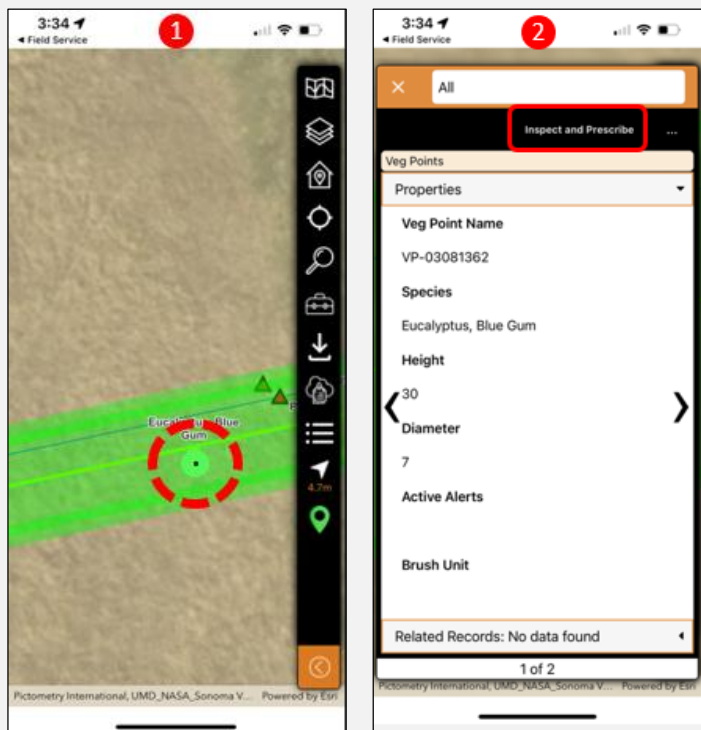
**Note:** For **OFFLINE USE**, users are encouraged to proactively cache maps by selecting the circular arrow under **Geocache Manager** while connected to Wi-Fi.

If changes continue to not show in the apps while working in areas with no service, perform a manual sync by selecting **Settings** and then the **Sync** button in **Lemur Pro** and relaunch your **SA**.

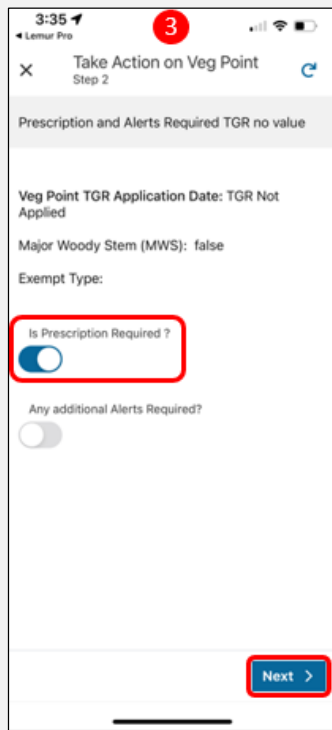


## Editing an Existing Veg Point

1. **Pin** the span, click the **"X"** on the top of the attribute screen to return to the map, and then **select** an existing veg point (green circle, black dot).
2. Select **Inspect and Prescribe**. **SFS** opens the **Take Action on Veg Point** steps.

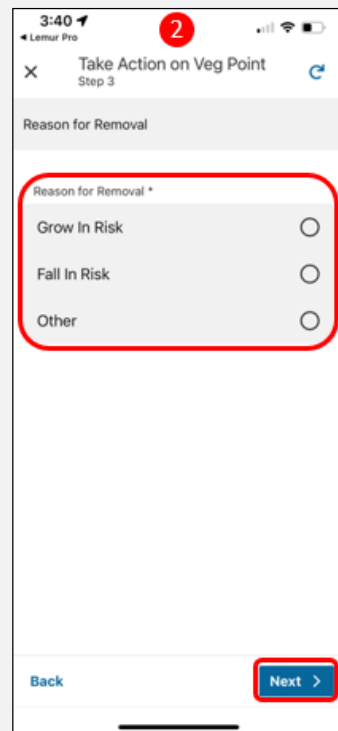
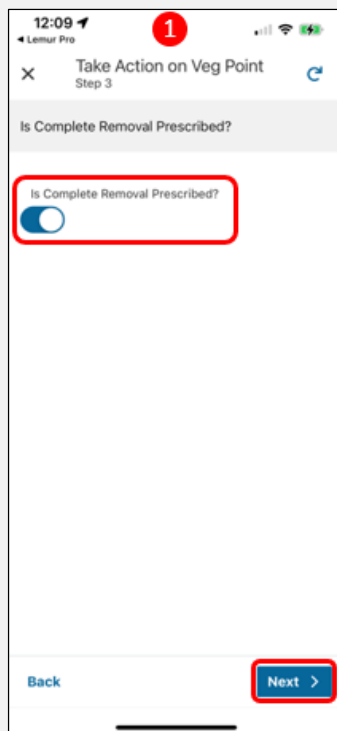


- 3. Toggle on **Is Prescription Required?** Select **Next**  
**Note:** If you leave the toggle off, it will create a **No Work** prescription.
- 4. Continue with steps 9-18 from **Creating a New Veg Point**.

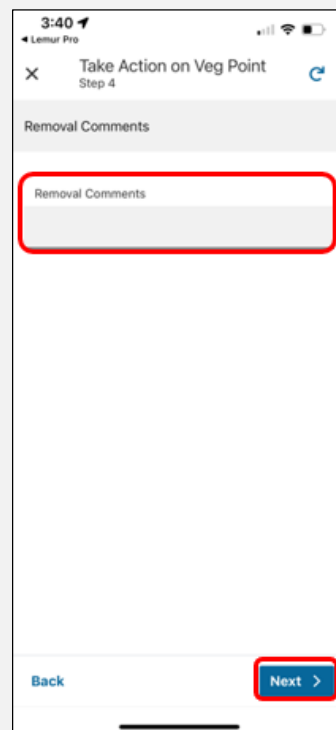


### Major Dismantle and Brush Removal Prescriptions

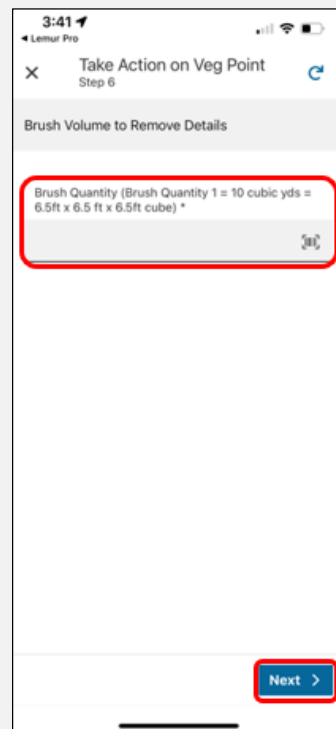
- 1. When selecting a **Prescription Action** resulting in removal, toggle on **Is Complete Removal Prescribed?** Select **Next**.
- 2. Select a **Reason for Removal**. Select **Next**.




3. Enter **Removal Comments**. Select **Next**.

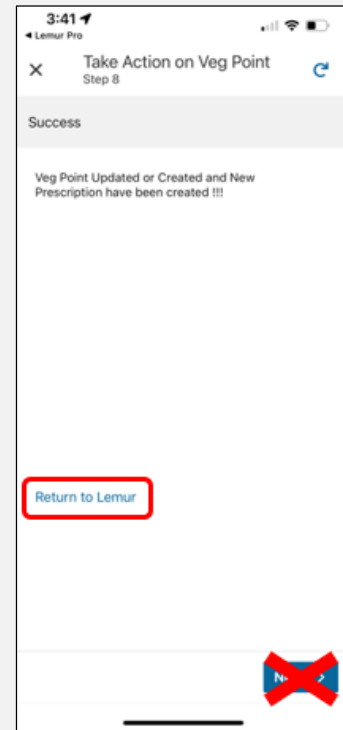


4. If your removal is brush (< 4" in diameter), you must also enter **Brush Volume to Remove Details**. Select **Next**.



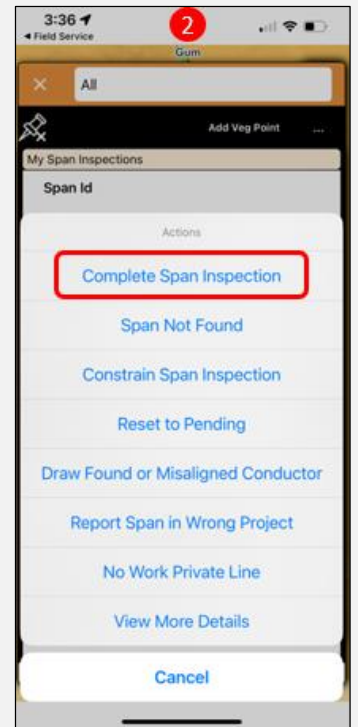
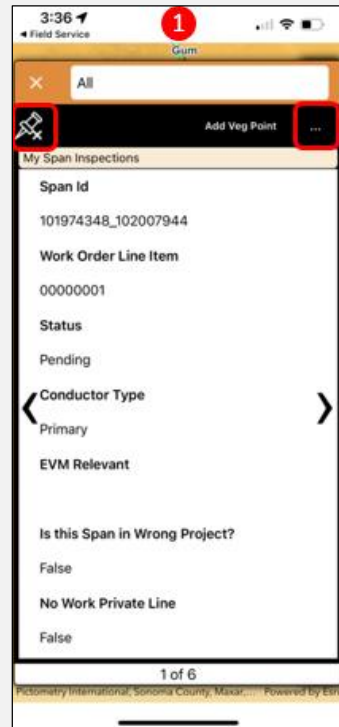
 **NOTE:** Brush volume must be entered as brush units NOT cubic yards (cy). A brush unit is 6.5' long x 6.5' wide x 6.5 tall or approximately 10 cubic yards. The maximum number of brush units you may enter on one veg point is 10.

- 5. The **Success** screen appears. Select **Return to Lemur**, do NOT select Next.

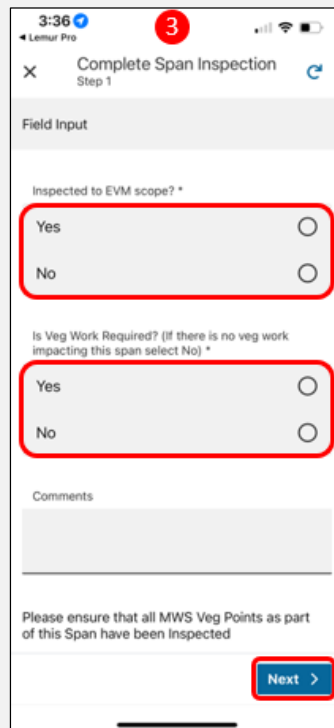


## Completing Span Inspections

- 1. Once all inspections on the span are complete, pin the span and tap the **ellipsis** in the upper right corner.
- 2. Select **Complete Span Inspection** in the pop-up menu.



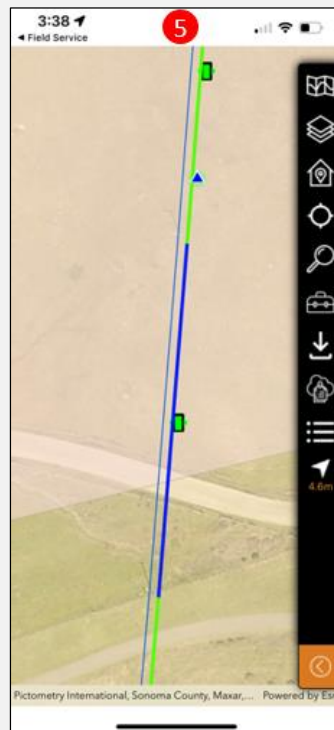
3. **SFS** launches automatically. Answer the questions '**Inspected to EVM Scope**' (Y/N)? and '**Is Veg Work Required**' (Y/N). This is required. Select **Next**.



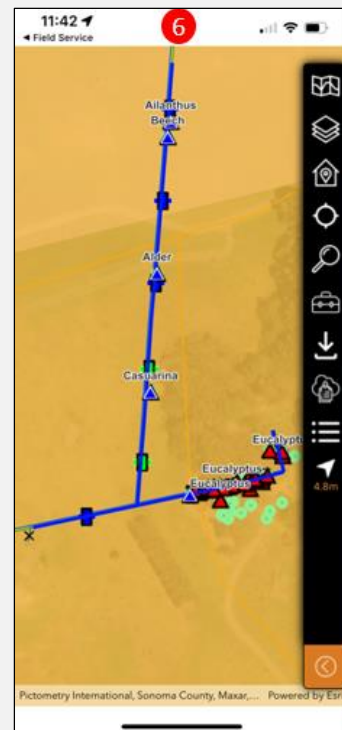
4. The **Success** screen appears. Select **Return to Lemur**, do NOT select Next.



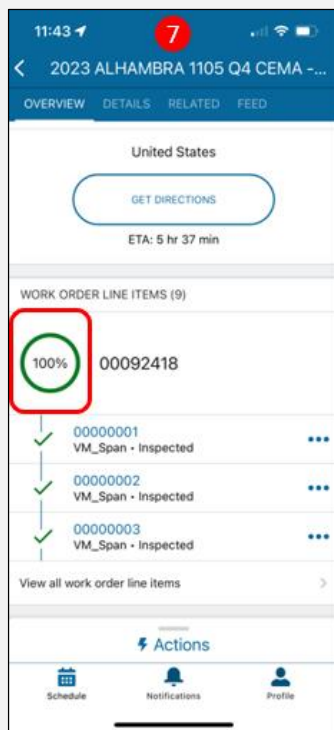
5. Completed spans will be **bold blue** on the map. Select the span you just inspected to unpin that span. Continue pinning and inspecting all spans and veg points in the **SA** until all spans are complete and **bold blue**.



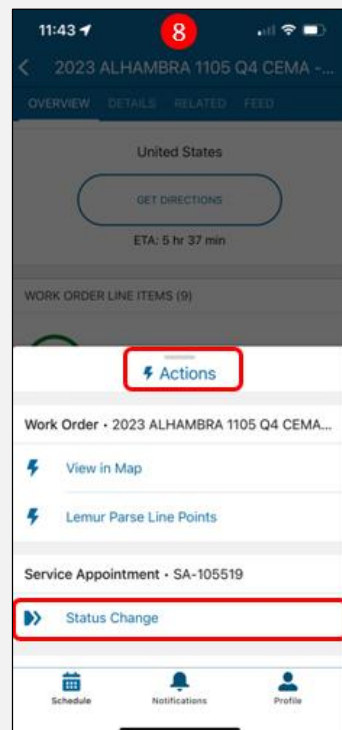
6. Once all spans in the **SA** are inspected and completed and appear **bold blue**, return to **SFS**.



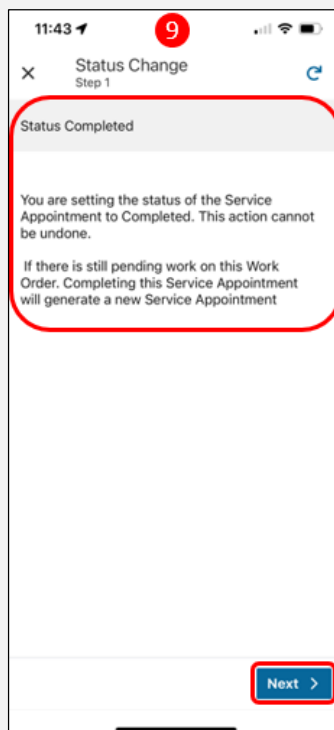
7. In **SFS**, select the **SA** and confirm that all **Work Order Line Items (WOLIs)** in the **SA** are complete.



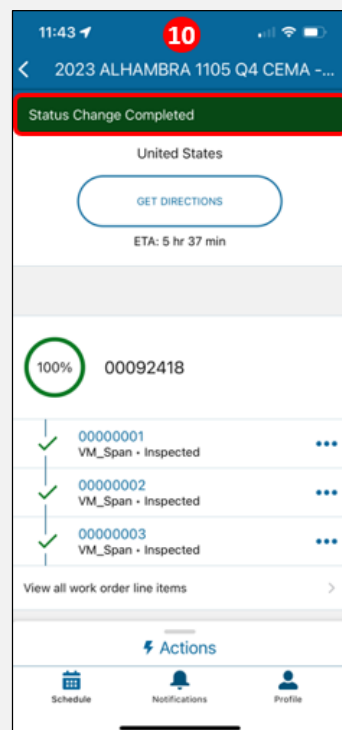
8. Drag up the **Actions** tab. Select **Status Change**.



9. The **Status Completed** message displays. Select **Next**.



10. The **Status Change Completed** banner will show at the top of the screen. The **SA** is now complete.



**NOTE:** If any **WOLIs** were not completed, a new **SA** will autogenerate containing those **WOLIs**. Report any unfinished **WOLIs** to your supervisor.

End of Document