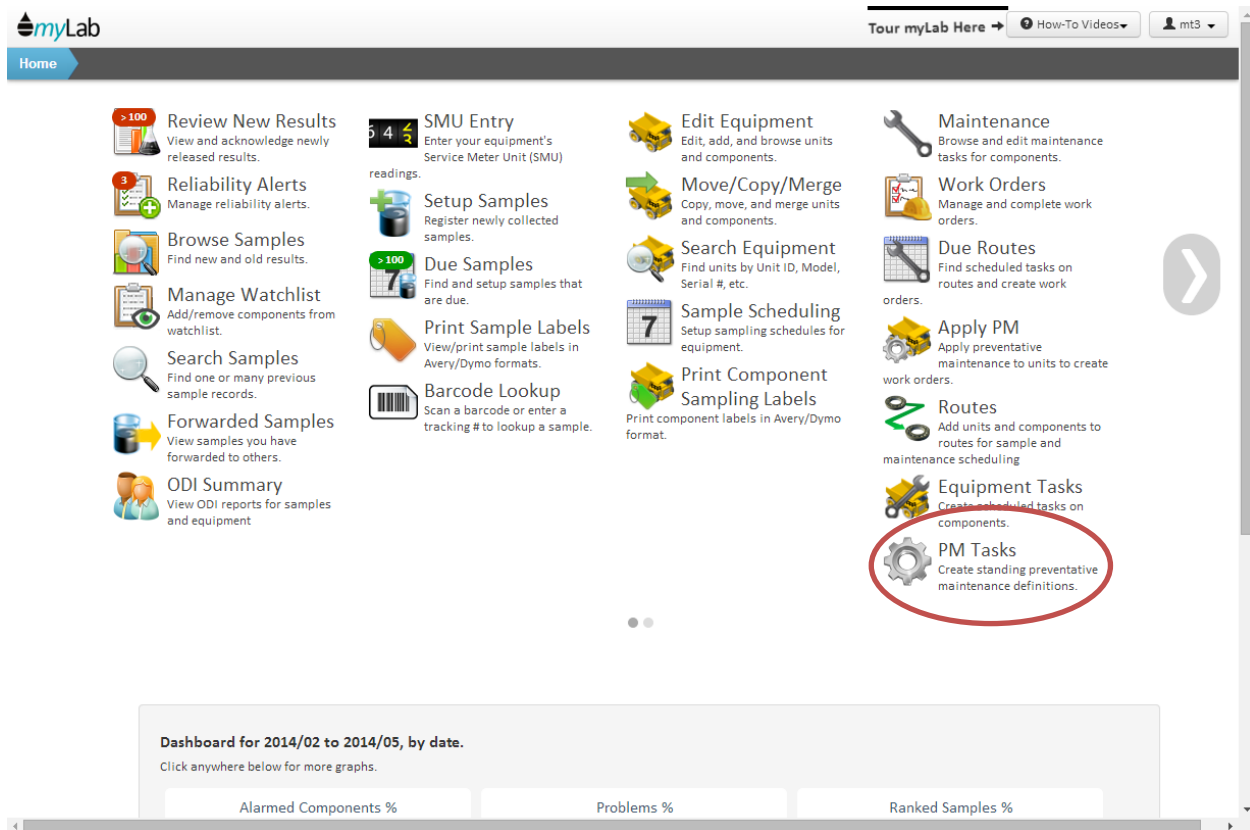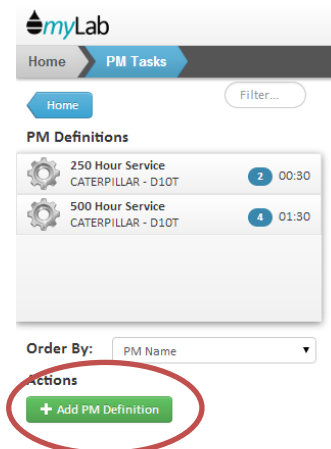# Defining PM Tasks
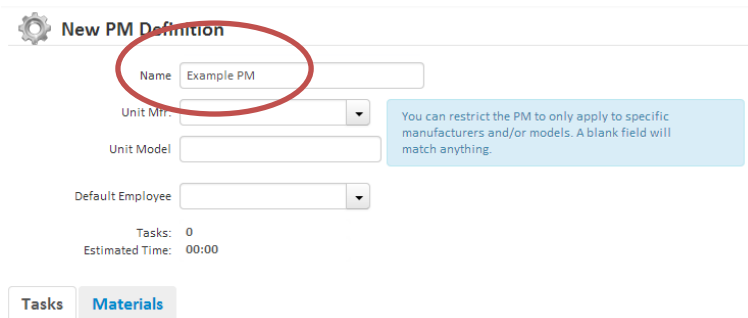
First, select PM Tasks from the myLab home page.

Now press the add PM definition button here.

Give your new PM a name here.

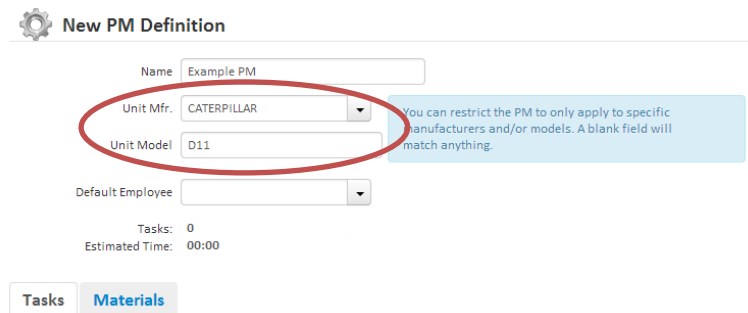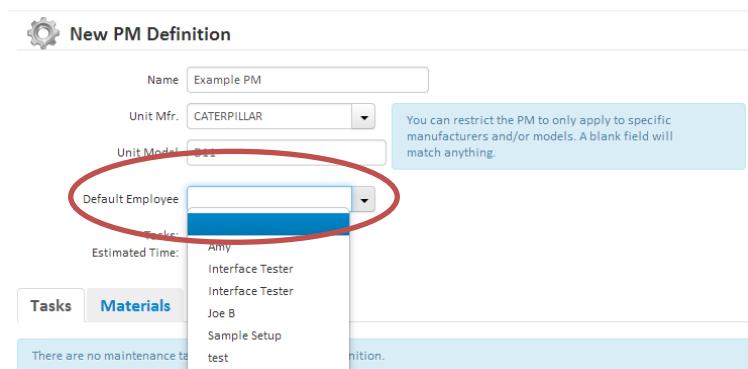
You can restrict the PM to only apply to a specific manufacturer and/or model here. This means it will only be available for units with a matching manufacturer and model. Blank fields here will match anything.
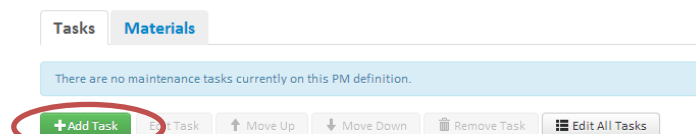

If you want, you can assign a default employee here. Whenever you create a work order for this PM it will be automatically assigned to this employee with the option to change it.

Now click the add task button, giving you a task form ready to be filled in.

You can restrict the task to only apply to specific components based on their component ID and/or location. Blank fields here will match anything.

Select the task from the drop list here.
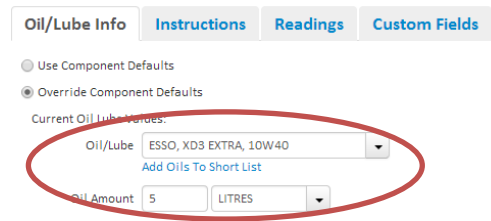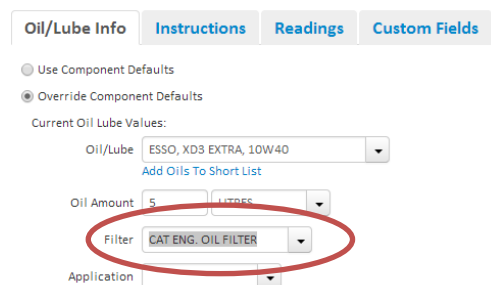
Set the task type and status.

For tasks that involve oil, grease or filters there is additional information on the oil/lube info tab. Here you can set the oil type and the amount needed for the task. The information entered here will be used to create a materials list so it should only be entered if the task requires it.
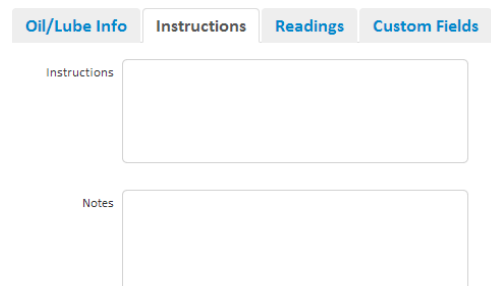

You can enter the type of filter to use here. As with the oil, this is used for the materials list so should only be entered if required.

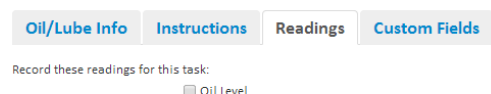The instructions tab allows you to enter both instructions and other notes for the task.

The readings tab allows you to select which readings should be recorded each time the task is done. Readings are a special type of custom field, if you haven't created any custom fields then this tab will be blank. Please refer to managing custom fields for more information.

The custom fields tab shows any other custom fields that have not been designated as readings. Again, if you haven't created any custom fields then this tab will be blank.

To save your changes click ok.

Now you can see the task is in the list and you can add more tasks using the same procedure.

If you have multiple tasks for this PM, they will be typically done in the order shown. You can change the order by using the move up and down buttons here.

Once you've added all your tasks, save your changes by clicking the save button here.
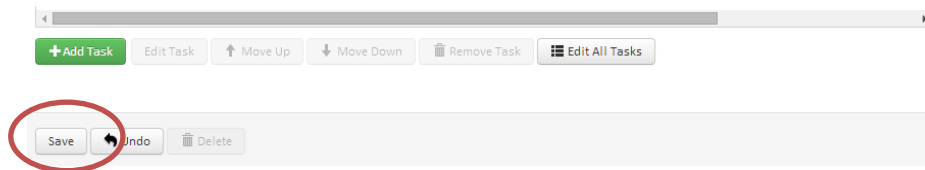
Now click on the materials tab. Here you can see all the oils and filters required for the tasks and the amount you need for each.

After you have created your PM definitions, you can apply them as needed to a unit when it is brought in for maintenance to create work orders. We recommend you refer to applying PM definitions next.