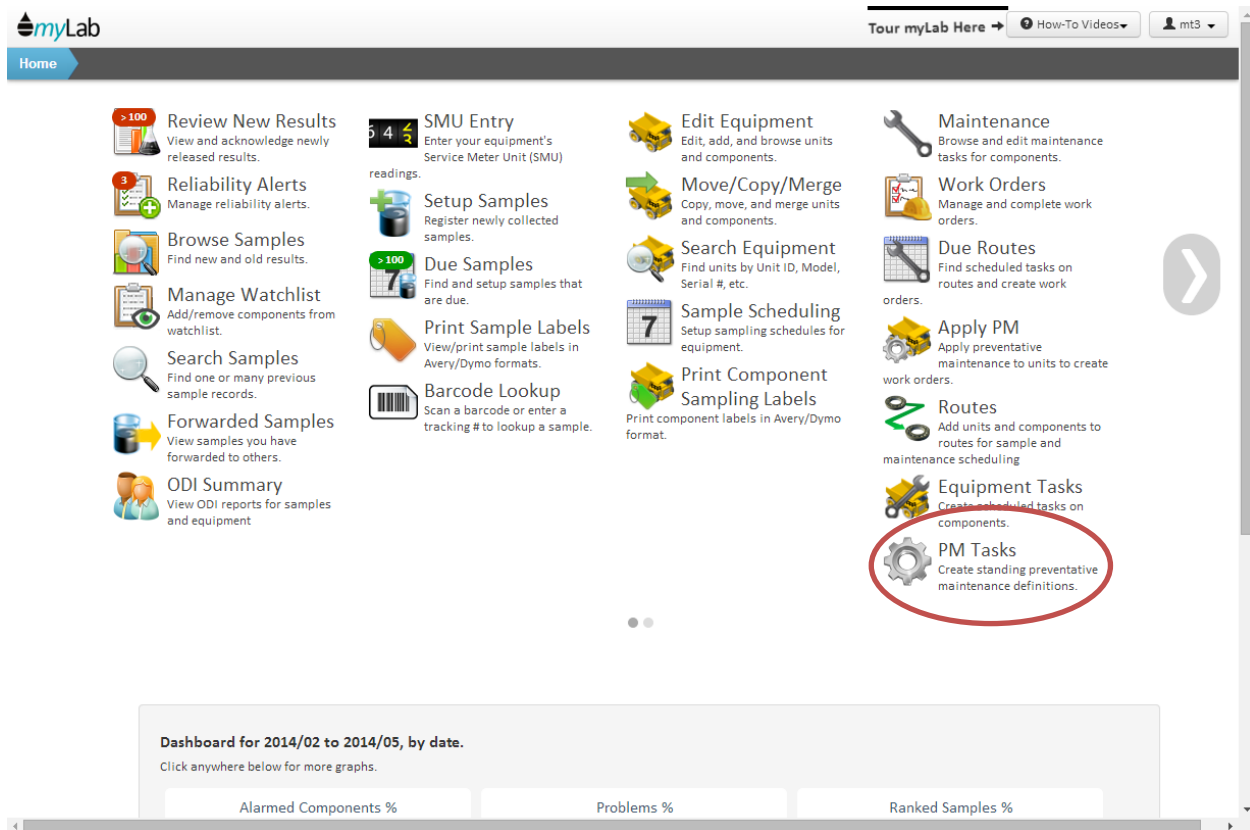
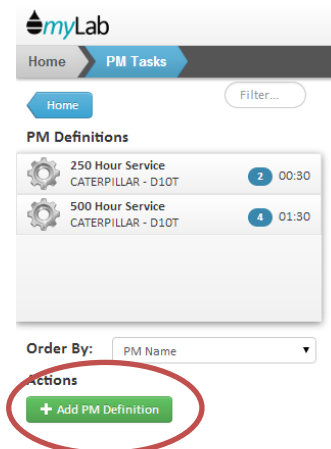


Defining PM Tasks

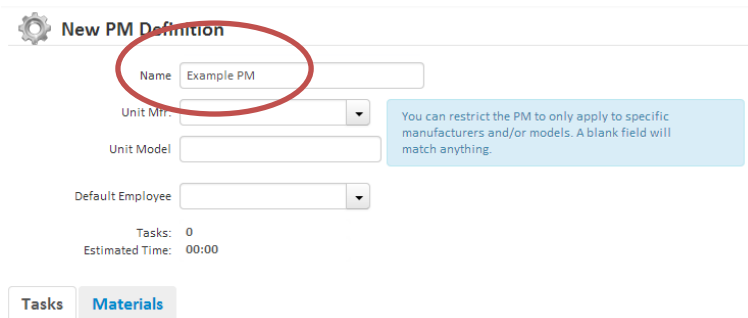
First, select PM Tasks from the myLab home page.



Now press the add PM definition button here.

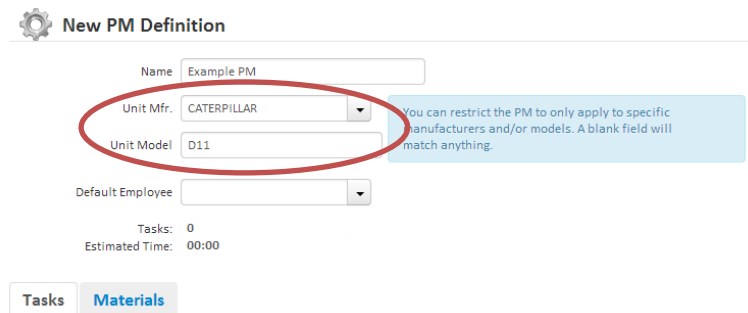


Give your new PM a name here.



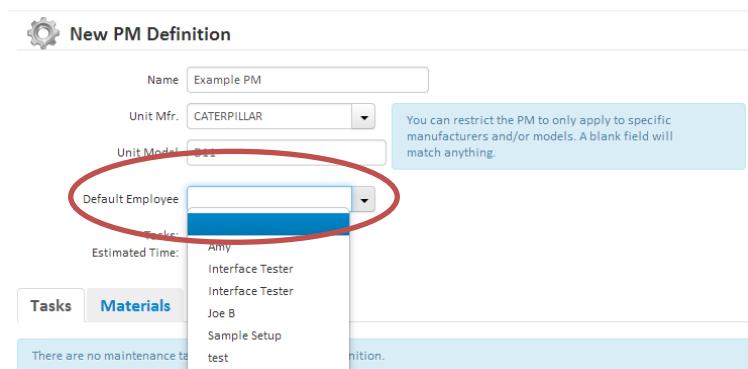
The screenshot shows the 'New PM Definition' form. The 'Name' field is circled in red and contains the text 'Example PM'. Below it are fields for 'Unit Mfr.', 'Unit Model', and 'Default Employee', all of which are currently blank. To the right of these fields is a blue informational box that reads: 'You can restrict the PM to only apply to specific manufacturers and/or models. A blank field will match anything.' At the bottom, there are tabs for 'Tasks' and 'Materials', with 'Materials' being the active tab. Below the tabs, it shows 'Tasks: 0' and 'Estimated Time: 00:00'.

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.



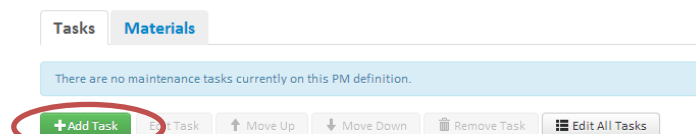
This screenshot shows the 'New PM Definition' form with the 'Unit Mfr.' and 'Unit Model' fields circled in red. 'Unit Mfr.' is set to 'CATERPILLAR' and 'Unit Model' is set to 'D11'. The 'Name' field remains 'Example PM'. The same blue informational box is present on the right. The 'Tasks' and 'Materials' tabs are at the bottom, with 'Materials' active. It also shows 'Tasks: 0' and 'Estimated Time: 00:00'.

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.



This screenshot shows the 'New PM Definition' form with the 'Default Employee' dropdown menu open and circled in red. The dropdown menu lists several options: 'Any', 'Interface Tester', 'Interface Tester', 'Joe B', 'Sample Setup', and 'test'. The 'Name' field is 'Example PM', 'Unit Mfr.' is 'CATERPILLAR', and 'Unit Model' is 'D11'. The blue informational box is on the right. The 'Tasks' and 'Materials' tabs are at the bottom, with 'Materials' active. It also shows 'Tasks: 0' and 'Estimated Time: 00:00'.

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



This screenshot shows the 'Tasks' tab of the 'New PM Definition' form. The '+ Add Task' button is circled in red. Below the button, there is a blue message box that says 'There are no maintenance tasks currently on this PM definition.' To the right of the message box are several buttons: 'Add Task', 'Move Up', 'Move Down', 'Remove Task', and 'Edit All Tasks'.

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.

Add Task ✕

You can restrict the task to only apply to specific components by ID and/or location. A blank field will match anything.

Component ID

Location On Unit

Task

Task Type

Status

Estimated Time (hh:mm)

Oil/Lube Info **Instructions** **Readings** **Custom Fields**

Select the task from the drop list here.

Add Task ✕

You can restrict the task to only apply to specific components by ID and/or location. A blank field will match anything.

Component ID

Location On Unit

Task

Task Type

Status

Estimated Time (hh:mm)

Oil/Lube Info **Instructions** **Readings** **Custom Fields**

Set the task type and status.

Add Task ✕

You can restrict the task to only apply to specific components by ID and/or location. A blank field will match anything.

Component ID

Location On Unit

Task

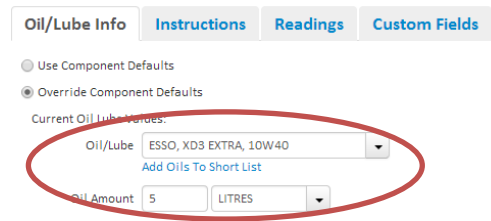
Task Type

Status

Estimated Time (hh:mm)

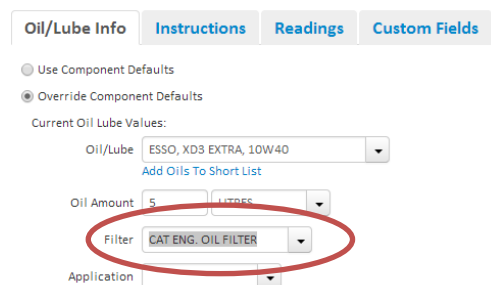
Oil/Lube Info **Instructions** **Readings** **Custom Fields**

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.



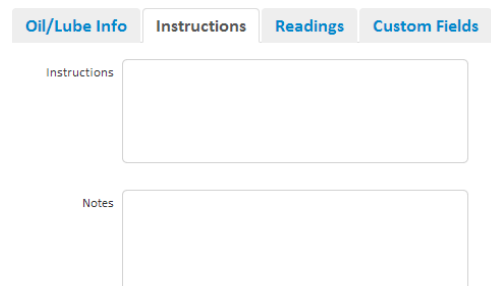
The screenshot shows the 'Oil/Lube Info' tab selected. Below the tabs are two radio buttons: 'Use Component Defaults' and 'Override Component Defaults', with the latter being selected. Under 'Current Oil/Lube Values:', there is a dropdown menu for 'Oil/Lube' showing 'ESSO, XD3 EXTRA, 10W40' and a text input for 'Oil Amount' with the value '5'. A red circle highlights these two fields. A link 'Add Oils To Short List' is also visible.

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.



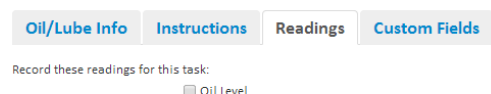
This screenshot is similar to the previous one but includes an additional field. Below the 'Oil Amount' field is a dropdown menu for 'Filter' showing 'CAT ENG. OIL FILTER'. A red circle highlights this field. The 'Application' field is also visible at the bottom.

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



The screenshot shows the 'Instructions' tab selected. It contains two large text input areas: one labeled 'Instructions' and another labeled 'Notes'.

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 screenshot shows the 'Readings' tab selected. It contains a section titled 'Record these readings for this task:' followed by a checkbox labeled 'Oil Level'.

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.

The screenshot shows the 'Custom Fields' tab selected. It contains two input fields: 'Mechanic ID' and 'Cost Center', both of which are currently empty.

To save your changes click ok.

This screenshot is identical to the previous one, but the 'Ok' button at the bottom right is circled in red to indicate it should be clicked to save changes.

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

The screenshot shows the 'Tasks' tab. A table lists tasks with columns: Component ID, Location On Unit, Task Type, and Task. The first row is highlighted with a red oval and contains the following data:

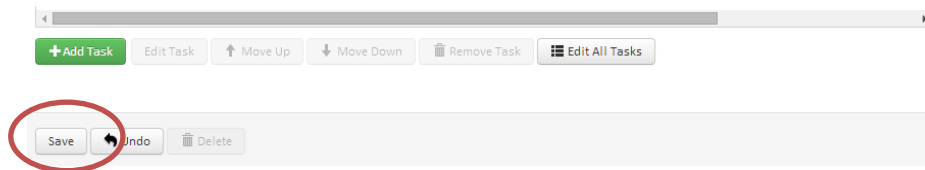
Component ID	Location On Unit	Task Type	Task
ENGINE		LUBRICATION	CHANGE THE OIL AND OIL FILTER

Below the table are several buttons: '+ Add Task', 'Edit Task', 'Move Up', 'Move Down', 'Remove Task', and 'Edit All Tasks'.

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.

This screenshot is identical to the previous one, but the 'Move Up' and 'Move Down' buttons at the bottom are circled in red to indicate they can be used to change the task order.

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.

Tasks **Materials**

Required Oils/Lubes:

Oil/Lube	Oil Amount	Oil Units
ESSO, XD3 EXTRA, 10W40	5	LITRES

Required Filters:

Filter	Amount
CAT ENG. OIL FILTER	1

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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.