# Create a PM Routine

The instructions below outline the minimum requirements to create a new PM routine in Evolve.

To add a new PM Routine:

1. Maintenance > Preventive Maintenance > Add.
2. Enter the name of your PM. TIP: Suffix with frequency.
3. OPTIONAL:
   a. Select or enter Type
   b. Select or enter Category
   c. Select Priority
   d. Select Trade
   e. Select Charge To
   f. Enter Estimated Hours
   g. Select Assign (this will automatically assign the work order to a labor provider. TIP: Be careful here, you must set up the Labor's Trade & Location to identify which Labor provider will be assigned).

Add PM Routine
TIP: suffix the Name with frequency. Example: (monthly)

A. Add TASK

B. Add ITEM

C. SCHEDULE
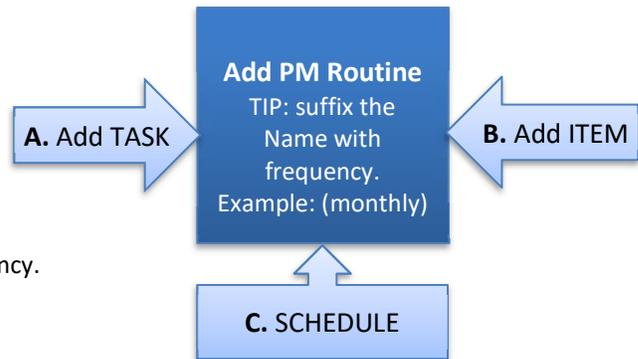
A. Add a Task(s) to the PM Routine

4. Click the Tasks tab.
5. Click Add.
6. In the Select Tasks list, search for and select the task to be added to the PM, and then click Save.
7. Repeat steps 5-6 as needed to add additional tasks to this PM.

TIP: You can select multiple tasks in step 6, however if you wish to control the order in which they appear on the work order, select and add one task at a time in the order in which you want them to display.

B. Add an Item(s) to the PM Routine

8. Click the Items tab.
9. In the Items Type pick list, select the item type to be added (asset is the default selection).
10. Click Add.
11. In the Select Item list, search for and select the item(s) to be added to the PM, and then click Save.

C. Schedule the PM

12. In the Recurrence Patten section, select a Recurrence Pattern (Daily, Weekly, Monthly, Annually).
13. For the selected Recurrence Pattern, complete its recurrence options.
    EX: MONTHLY "The First Monday of every 6 months" will generate a semi-annual PM work order on the 1st Monday of the 6 month interval.
14. In the Dates section, select the Start Date.
    TIP: The Start Date is the date you want the first incidence of your Recurrence Pattern to execute. It will also be used as the Completion Due Date of your first PM work order. Enter either the current date or a future date; do not select a Start Date that is in the past.
15. Select an End Date for the PM routine ("No end date" is the default selection).
16. In the Options section do either of the following:
    a. Enter the number of days in advance of the work order due date that you want to generate your PM work orders. EX: 14 will generate the work order 2 weeks prior to the date the work is due.
    b. Select Group Assets to group all items assigned to the PM routine onto one work order.
17. Click Save.