

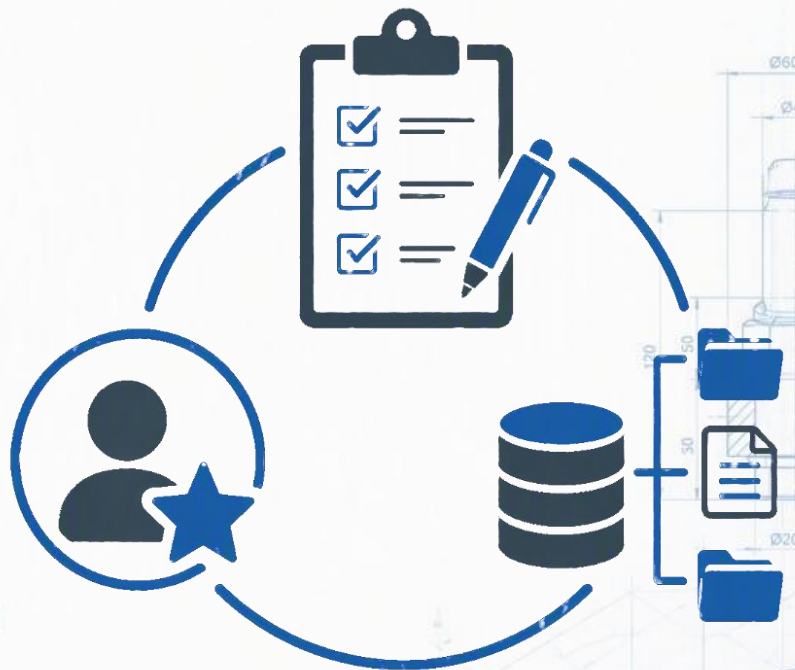
Find out if you need a PDM

Introduction

The following questions, which can be answered simply with “Y” or “N,” are designed to analyze your company’s needs regarding the management of technical, project, and process documents.

The goal is to identify areas where a PDM system can help improve **information organization, data control, and operational efficiency** by providing practical tools to address the most common challenges in document management. Among the key aspects examined are:

- ▶ Document Coding and Filing
- ▶ Searching for and Accessing Information
- ▶ Document Lifecycle Management
- ▶ Security and Control Access
- ▶ Bill of Materials (BOM) Management
- ▶ Event Recording



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Document Coding and Filing

✓ Do you need to encode and archive technical documents, drawings, CAD models, or other project data?.....

☐ Y☐ N

✓ Do cataloging and archiving activities require a lot of time and resources?.....

☐ Y☐ N

✓ Are the coding and filing rules applied consistently by all users? Do you ever find the same component filed under different codes, in different locations, or on local drives that are inaccessible to the rest of the team?.....

☐ Y☐ N

✓ Throughout a product's lifecycle—from conception to completion—do you have trouble keeping all related documents organized? Have you ever lost information or been unable to quickly retrieve files stored in folders and subfolders?.....

☐ Y☐ N

✓ Do you need to reuse components that have already been coded in new projects without having to recreate the documentation or reassign the codes?.....

☐ Y☐ N

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Searching for and Accessing Information

✓ Can you quickly find the documents and information you need?.....

Y

N

✓ Do you always know exactly where the documents you're looking for are?.....

Y

N

✓ Are you sure the document you found is the correct, up-to-date version—and not a duplicate or outdated copy?.....

Y

N

✓ Would it be helpful for you to be able to search for components and documents using specific characteristics -such as material, manufacturing process, category, work order, or other technical properties- rather than just the file name?.....

Y

N

✓ Are company documents and information easily accessible and shareable among the various departments involved?.....

Y

N

✓ Do you always know in which assemblies, material lists, products, or projects a particular component is used?.....

Y

N



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Document Lifecycle Management

✓ Do you need to store and make available all versions and revisions of documents over time?.....

☐ Y☐ N

✓ Can you easily find and view previous versions of a document when needed?.....

☐ Y☐ N

✓ Are you able to accurately track and compare the changes made to a document as it evolves?.....

☐ Y☐ N

✓ Do you need to manage, monitor, and provide updates on the progress of new documents or related changes, while involving various users and company departments in the review, approval, and release processes?.....

☐ Y☐ N

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Security and Control Access

✓ Are you sure that the same document cannot be edited by multiple users at the same time, thereby preventing conflicts and unwanted overwrites?.....

☐ Y☐ N

✓ Are document access and editing rights effectively managed and controlled based on user roles?.....

☐ Y☐ N

✓ Are operations such as renaming, moving, or deleting files protected by controls that ensure their security and traceability?.....

☐ Y☐ N

✓ Do you need to define specific permissions for viewing, editing, creating, and approving documents based on each user's role or responsibilities?.....

☐ Y☐ N

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Bill of Materials (BOM) Management

- ✓ Is it quick and easy to create and manage bills of materials?.....
- ✓ Can you reuse an existing bill of materials as a basis for new products or projects, making the necessary changes without having to recreate it from scratch?.....
- ✓ Can you easily track all the changes made to the bill of materials, including changes in quantities, components, and revisions?.....
- ✓ Is the Bill of Materials integrated with other company systems, such as ERP or business management software, or does it require manual data entry and updates?..

Event Recording

- ✓ Do you need reports on document-related activities, such as the number of documents created during a specific period, documents awaiting approval, or the progress of processes?.....
- ✓ Can you quickly find this information accurate and up to date without having to perform manual checks or calculations?.....



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Supplementary Questions on the Company's IT System

✓ Which are the current operative systems?

.....

✓ Is an ERP system currently in use, and if so, which one?

.....

✓ Do you use one or more CAD system?

.....

✓ Is there a company server with a shared folder?

.....

✓ Do single users usually save files locally?

.....

✓ Is there a corporate domain to which the PCs are joined?

.....

✓ Is Active Directory active?

.....

✓ Is there a company SQL Server and, if yes, which version?

.....

✓ What types of files are handled and used in the company (e.g., PDF, DWG, DOC, etc.)?

.....

✓ How many users could benefit from the features of a PDM?

.....

✓ How many users could be using a PDM at the same time?

.....



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✓ Additional useful information to supplement what has already been provided

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Technical drawing of a mechanical assembly, likely a pump or motor housing, showing various components and dimensions. The drawing includes a main assembly view on the left and a detailed cross-sectional view on the right. Dimensions are provided in millimeters (mm).

Dimensions:

- $\varnothing 10$ H7 (Top right dimension)
- $\varnothing 60$ (Right side dimension)
- 120 (Right side dimension)
- 50 (Right side dimension)
- $\varnothing 20$ (Bottom right dimension)

The drawing is overlaid with a grid of dotted lines for writing.



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