OpenBOM Implementation Strategy Plan

Managing CAD, BOMs, Catalogs, and Procurement with Confidence

Presented by: [Your Name / Company]

Overview

- Objective: Streamline engineering and procurement workflows with OpenBOM

- Scope: CAD file management, BOM capture, catalog structure, RFQ & purchasing

- Outcome: Aligned team, clear workflows, practical usage Manifesto

Implementation Goals

1. Manage SolidWorks files collaboratively

2. Capture BOMs from SolidWorks and Altium 365

3. Organize centralized item catalogs; import Excel data

4. Establish a simple RFQ and purchasing workflow

5. Define success using the "OpenBOM Manifesto"

Phase 1 - SolidWorks File Management

Install OpenBOM for SolidWorks add-in

Enable version-aware file management
(OpenBOM Design/Folder Sync)

Set naming and revision rules

Train team on workflows

Outcome: Traceable, collaborative file handling

Phase 2 - BOM Capture from SolidWorks & Altium 365

- Configure OpenBOM to extract BOMs from SolidWorks

- Sync electronics BOMs from Altium 365

- Map and normalize key properties

- Validate with stakeholders

Outcome: Structured, reliable BOMs tied to design data

Phase 3 - Item Catalog & Excel Import

- Create item catalogs by type (mechanical, electronics, etc.)
- Import existing Excel data
- Normalize units, part numbers, costs, images
- Link BOMs to catalog items

Outcome: One source of truth for parts and properties

Phase 4 - RFQ & Purchasing Process

- Build vendor list and link to items

- Generate POs and RFQs from BOMs

- Track quantities, cost, order status

- Enable stakeholder collaboration

Outcome: BOM-driven purchasing workflow with traceability

Phase 5 - OpenBOM Manifesto

- Summarize our principles for using OpenBOM
- Define roles, responsibilities, and workflows
- Set standards for item/BOM naming and revisions
- Distribute internally for alignment

Outcome: A working Manifesto to guide adoption

Example Manifesto (Preview)

- We use OpenBOM to manage CAD BOMs with live data.

- Our catalogs are the single source of truth.

- BOMs are reviewed before release. RFQs start from BOMs.

- We collaborate through OpenBOM to build our product knowledge.

Final Notes

- Assign an OpenBOM Champion

- Pilot a small project for testing

- Review and revise Manifesto quarterly

- Use help docs, videos, and onboarding support

Let's build our digital thread together.