



JUNE 2026 · PARTS & MAINTENANCE

A cleaner BOM supports clearer downstream documents

The bill of materials often feeds drawings, parts catalogues, purchasing and service information. Small inconsistencies become more difficult to resolve when they are copied into several systems. Cleaning the source data first gives each downstream document a stronger foundation.

Clear information. Confident next steps.

Eight-page reading booklet
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01 / UNDERSTAND

Start with a clear foundation

Define the fields and hierarchy

Agree what each field means before editing it. Separate the internal part number from a supplier reference and keep units of measure explicit. Preserve the assembly structure where it affects quantities and applicability. A flattened list can be useful, but it should not silently replace the original hierarchy.

Check duplicates with care

Two rows with similar descriptions are not necessarily the same part. Equally, one part may appear under several spelling variations. Flag potential duplicates for review and retain the original references until the responsible team confirms the change. Administrative cleaning should not become an unapproved substitution decision.



02 / APPLY

Turn information into action

Validate a sample import

Prepare data in the required ERP, PDM or CMMS format and test a small reviewed sample through the customer's approved process. Check whether leading zeroes, units, special characters and parent-child relationships survive the transfer. Record the mapping so a later update can use the same method.

One item, several downstream uses

The same approved item identifier may appear in a model, drawing, purchasing list, parts catalogue and ERP import. Inconsistent descriptions or quantity bases can spread quickly between them. Establish which system owns each field and how updates are approved. Keep manufacturer references separate from internal item numbers. A clean-looking spreadsheet is not enough if the underlying assembly relationships are wrong or duplicated. Reconcile a small sample through the whole chain before expanding the dataset.

**03 / LOOK CLOSER**

Validate rules and exceptions separately

Check required identifiers, duplicate keys, valid units and parent-child relationships using agreed rules. Then review exceptions with the data owner rather than automatically merging or deleting records. A zero quantity may be a deliberate condition or an error; an empty field may mean unknown rather than not applicable. Record the business meaning before transformation. Retain the original export, the approved mapping and the exception decisions so a later reviewer can understand how the final list was produced.

- Which user needs this information most urgently?
- Which source is authoritative, and who can approve it?
- What would make a small pilot useful to your team?

**04 / WORKSHOP**

Make it a team conversation

Use one small, approved example from your own organisation. Nominate a document owner and a reviewer, then apply the checklist below. Record the initial problem, the proposed improvement and the evidence needed to confirm it. Keep the exercise separate from any live equipment activity or production change until the appropriate authority approves it. Discuss what became clearer, which inputs were missing and whether the same approach can be repeated. A modest improvement that your team actually uses is a stronger starting point than an ambitious system with no agreed owner.

- Name the document owner and technical reviewer.
- Write down one unresolved source-information question.
- Agree one measurable information-finding task.
- Record what changed after the review.



05 / WORK WITH CDX

A practical delivery partnership

CDX can help organise the source material, prepare a representative layout, produce the agreed CAD or documentation outputs and maintain a comment register through review. Offshore production is coordinated by Australian management under a defined scope. We do not provide engineering sign-off or create evidence of inspections that have not occurred. Bring the approved source information, your intended audience and the required deliverable list to the discussion. We will identify the preparation work, unresolved questions and review responsibilities before agreeing the production scope.

- Supporting documentation from AUD \$10/hr + GST.
- CAD drafting & modelling from AUD \$16/hr + GST.
- Technical documentation from AUD \$16/hr + GST.
- 12-month work warranty; scope and conditions apply.



06 / CHECK & ACT

Your next step

Choose ten frequently ordered parts and trace them from the BOM to the parts catalogue. Record the inconsistencies before deciding which source should be corrected.

- Define field meanings and units.
- Preserve original references.
- Review suspected duplicates.
- Reconcile quantities against the approved assembly.
- Validate a sample before wider data transfer.



07 / TAKE IT FORWARD

A one-page improvement brief

Use these prompts to start a focused discussion with your team. Keep confidential equipment details inside your approved project channels.

- Problem: what information is difficult to find or trust?
- Reader: who needs it and at what point in their work?
- Source: which approved files and records exist?
- Deliverable: what would make the information usable?
- Review: who will confirm the technical content?
- Success: how will you check whether it helped?

Start a scoped conversation

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General educational material. CDX prepares work for review and does not provide engineering sign-off. Your responsible authority approves equipment-specific instructions and technical decisions.