KOmatrix SpecView™

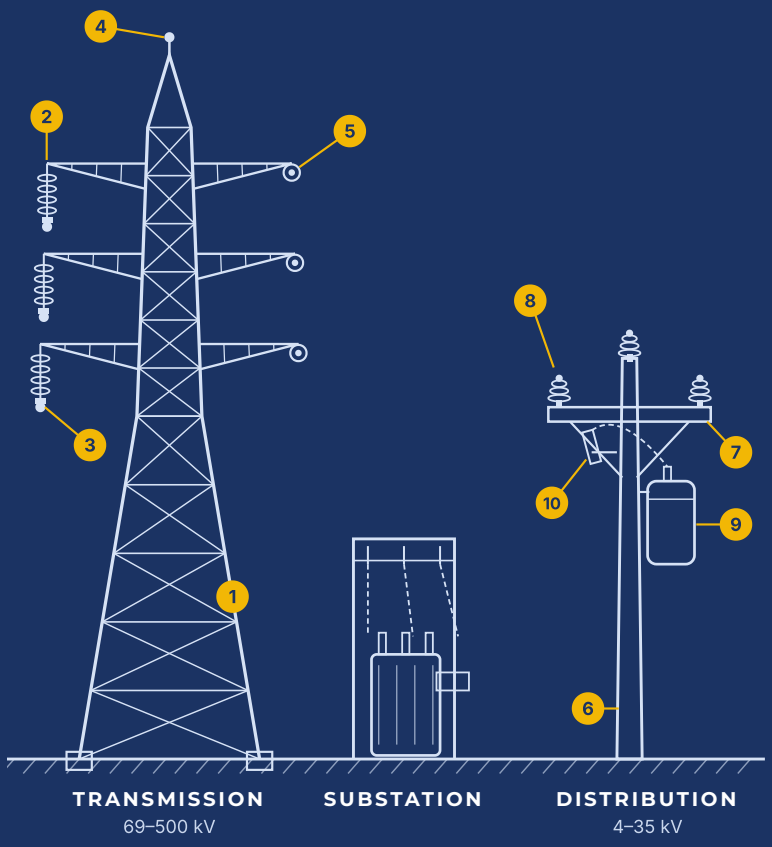
BY KIRKWOOD & OLNEY™

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BOM Best Practices Checklist

What Makes a Bill of Materials Procurement-Ready

For utility companies, engineering firms, and consultants



BILL OF MATERIALS

ITEM	DESCRIPTION	QTY	UNIT
	TRANSMISSION · 69–500 kV		
1	Lattice tower, double circuit	1	EA
2	Polymer insulator, 138 kV	6	EA
3	ACSR conductor, 795 kcmil	6	KFT
4	OPGW shield wire	1	KFT
5	Compression deadend assembly	6	EA
	DISTRIBUTION · 4–35 kV		
6	Wood pole, 45 ft Class 2	1	EA
7	Wood crossarm (8 ft)	1	EA
8	Polymer pin insulator, 15 kV	3	EA
9	Pole-mount transformer, 25 kVA	1	EA
10	Fused cutout & surge arrester	1	SET

What Makes a BOM Procurement-Ready

Use this checklist before a bill of materials leaves engineering. Work through the core questions first, then the five practice areas that follow. Check each item once it is confirmed for your project.

PROJECT	CLIENT	PREPARED BY
QA REVIEW 1 · REVIEWER / DATE	**QA REVIEW 2 · REVIEWER / DATE**	**DATE ISSUED**

CORE READINESS QUESTIONS

- [ ] Has your bill of materials been through a minimum of two (2) quality assurance (QA) review cycles?
- [ ] Does the material meet the scope of the design?
- [ ] Does the material allocated to each structure align with its intent? For instance, if the structure in question is a deadend, do the listed insulators meet the strength requirements?
- [ ] Is material and hardware procured directly through the vendor, or is a material list given to the client's procurement department?
- [ ] Is any non-standard material required for your project?
- [ ] Has the need for non-standard material been communicated to and approved by your client?
- [ ] Does the compilation format fit the client's preferences?
- [ ] Will selections be input into an online system or database?

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1 Defining project scope and gathering design inputs

- [ ] Are client standard assemblies being used, or will your team have to develop them from scratch?
- [ ] If using standards, are there items that may need to be substituted?
  - [ ] Are all cable types applicable to that particular standard?
  - [ ] Are quantities applied per phase, circuit, or structure?
  - [ ] Do units of measurement align with what's expected?
- [ ] If developing assemblies from scratch, consider the following:
  - [ ] What are you using as a guide?
  - [ ] Have you done a fit check for each item?

2 Connecting engineering and procurement workflows

- [ ] How will design changes affect lead times and project completion?
- [ ] How easily can your team assess material substitutions proposed by procurement specialists?
- [ ] How will changes to material after ordering be updated internally and externally? Will an online system need to be updated by your team or by the client's procurement specialist?
- [ ] Are any unit conversions necessary?
- [ ] Use **KOmatrix SpecView™** to compare original parts to proposed substitutions.

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3 Managing revisions, substitutions, and approvals

- [ ] Where are changes made after the first issue or order of material documented?
- [ ] If no change record exists, is your reasoning for quantities and selections clear?
- [ ] Are there notes documenting choices and validation?

4 Preparing for software integration and automation

- [ ] Upload templates and coversheets to **KOmatrix SpecView™** for a seamless transition between BOM requirements.

5 Building consistent material records and organizing assemblies

- [ ] Establish a naming convention.
  - [ ] Use the client standard, if applicable.
  - [ ] If not, establish a naming procedure that makes sense for the project and can be reused on future work.
- [ ] Determine how modifications to quantities and/or material parts will be handled.
- [ ] Use **KOmatrix SpecView™** to assign drawings to individual parts and assemblies.

Put this checklist to work in KOmatrix SpecView™
Compare substitutions, manage BOM templates, and link drawings to parts and assemblies.

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