

The Complete DAM Buying Checklist for Manufacturing Companies

Your Strategic Guide to Selecting the Right Digital Asset Management Platform

Introduction: Why Manufacturing Needs Purpose-Built DAM

Manufacturing operations face unique digital asset challenges that generic DAM platforms weren't designed to handle:

- **Complex product documentation** across engineering, production, quality, and sales
- **Multi-generational product lines** requiring historical records and version control
- **Regulatory compliance** with documentation, certifications, and audit trails
- **Global supply chain coordination** across facilities, suppliers, and distributors
- **Technical specifications** that must stay synchronized with production
- **Sales enablement** for distributors, dealers, and customer-facing teams

This checklist will help you evaluate DAM platforms based on what actually matters for manufacturing operations—not generic enterprise features that don't address your specific challenges.

How to Use This Checklist

As you evaluate DAM vendors:

- **Check each requirement** that applies to your organization
- **Star critical must-haves** that are non-negotiable
- **Take notes** on how each vendor addresses your specific needs
- **Compare responses** across platforms using this standardized framework
- **Scoring Guide:**
 - **Essential (Must-Have):** Platform cannot be considered without this
 - **Important (Should-Have):** Strong preference, willing to compromise if other areas excel
 - **Nice-to-Have:** Differentiator between otherwise equal platforms

SECTION 1: Product & Technical Documentation Management

Product Lifecycle Documentation

- ☐ **Product hierarchy organization** (Product Line → Model → SKU → Component)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **CAD file storage** (STEP, IGES, DWG, DXF, SolidWorks, AutoCAD, CATIA)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **3D model preview** (STL, OBJ, FBX for visualization and AR)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Engineering drawing version control for images** with markup and revision tracking
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Bill of Materials (BOM) linking**
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Historical product documentation** archiving with easy retrieval
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Obsolete part documentation** with clear status flagging
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Technical Specifications & Manuals

- ☐ **Owner's manual and installation guide management**
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Technical specification sheets** with version control
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Service and maintenance documentation**
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Assembly instructions and exploded view diagrams**
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Multi-language documentation** management and distribution

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Safety data sheets (SDS) and hazard documentation**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Manufacturing-Specific Metadata

☐ **Custom metadata fields** for manufacturing attributes:

- Part number/SKU
- Model/series designation
- Material specifications
- Dimensions and tolerances
- Weight and shipping specifications
- Country of origin
- UPC/EAN codes
- Revision date and number
- Engineer/designer attribution
- Production facility

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Preconfigured vocabularies** for consistent terminology (product lines, materials, facilities)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Metadata extraction**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

SECTION 2: Compliance & Quality Management

Regulatory Compliance

- ☐ **ISO 9001 documentation** support and audit trails

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Industry-specific compliance** (ISO 13485 medical, AS9100 aerospace, IATF 16949 automotive)

Specify your requirements:

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Certificate of Conformance (CoC) management**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Regulatory submission documentation** (FDA, CE, UL, etc.)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Export compliance documentation** (ITAR, EAR, dual-use restrictions)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Environmental compliance** (RoHS, REACH, WEEE directives)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Quality Documentation

- ☐ **Quality control inspection reports**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Test results and certification documents**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Supplier quality documentation**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Corrective Action and Preventive Action (CAPA) documentation**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Non-conformance reports** with visual documentation

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Audit & Traceability

- ☐ **Complete audit trail** (who accessed/modified what, when)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
 - ☐ **Immutable records** for regulated documentation
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
 - ☐ **Document retention policies** with automated enforcement
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
 - ☐ **Audit report generation** for compliance reviews
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
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SECTION 3: Engineering & Production Workflows

CAD/PLM Integration through CI Hub

- ☐ **PLM system integration** (Windchill, Teamcenter, Enovia, Arena, etc.)
Your PLM system: _____
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **CAD software integration** (SolidWorks, AutoCAD, Inventor, CATIA, Creo)
Your CAD systems: _____
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Automatic CAD file conversion** for viewing/sharing
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Engineering Change Order (ECO) workflow**
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Version Control & Change Management

- ☐ **Robust version control** for all technical documents
 - Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Change history** with reason codes and approver tracking
 - Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Rollback capabilities** to previous approved versions
 - Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **"Latest approved" vs. "work in progress"** status management
 - Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have

Approval & Release Workflows

- ☐ **Multi-stage approval workflows** (engineer → manager → quality → release)
 - Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Electronic signature** for document approval
 - Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Conditional approval routing** based on document type or change level
 - Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Notification system** for pending approvals and releases
 - Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have

SECTION 4: Sales Enablement & Marketing

Product Marketing Assets

- ☐ **Product photography** management (studio, lifestyle, application shots)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Product videos** (demos, installation guides, promotional)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Marketing collateral** (brochures, spec sheets, catalogs)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Trade show materials** and event assets
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Brand assets** (logos, color palettes, templates)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Distributor & Dealer Support

- ☐ **Partner portal** for distributors/dealers to access approved assets
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Custom branding** for dealer-specific materials
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Download tracking** by partner/region
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Automatic updates** when new product materials are released
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

SECTION 5: Supply Chain & Operations

Supplier Collaboration

- ☐ **Supplier portal** for component specs and documentation
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Supplier quality documentation** collection and tracking
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Supplier certification management**
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Component specifications** shared with supply chain
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Multi-Facility Management

- ☐ **Facility-specific documentation** organization
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Global asset access** with regional permissions
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Production line documentation** (procedures, setup sheets, work instructions)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Equipment manuals and maintenance records**
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Standard Operating Procedures (SOPs)** management
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Packaging & Shipping

☐ Packaging specifications and artwork

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ Label artwork and compliance information

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ Shipping documentation templates and assets

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ Pallet/container configuration diagrams

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

SECTION 6: Technical Requirements

File Format Support

☐ Engineering file formats:

- CAD: STEP, IGES, DWG, DXF, native formats (specify): _____
- 3D: STL, OBJ, FBX, GLTF
- PDF with layers and technical annotations
- **Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have

☐ Documentation formats:

- Microsoft Office (Word, Excel, PowerPoint)
- Adobe (PDF, InDesign, Illustrator)
- Video (MP4, MOV, AVI)
- **Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have

☐ Large file handling (100MB+ CAD assemblies)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ Priority format support for your specific tools

- List your formats: _____
- **Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have

Search & Retrieval

- ☐ **Advanced search** across metadata, content, and file properties

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Part number search** with wildcard and partial match

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Full-text search** in technical documents

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Saved searches** for frequently used queries

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Search within CAD metadata** (material, dimensions, properties)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Performance & Scalability

- ☐ **Storage capacity** for your needs

- Current storage needs: _____ TB
- 5-year projection: _____ TB
- **Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **CAD file preview** without native application

- Expected users: _____
- **Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Concurrent user capacity**

Expected users: _____

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Upload/download speed** for large engineering files

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

SECTION 7: Security & Access Control

Access Control

- ☐ **Role-based access control (RBAC)**
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Granular permissions** (view, download, edit, delete, approve)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Folder/collection-level permissions**
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **External user access** (suppliers, partners) with limited permissions
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Single Sign-On (SSO)** support
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Multi-factor authentication (MFA)**
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Intellectual Property Protection

- ☐ **Watermarking** for sensitive documents
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Download restrictions** and limits
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Print controls** for confidential materials
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Expiring links** for temporary external access
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

SECTION 8: User Experience & Collaboration

Interface & Usability

- ☐ **Intuitive interface** for non-technical users (production floor, sales)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Mobile access**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Bulk operations** (upload, tag, approve multiple files)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Drag-and-drop** functionality

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Collaboration Tools

- ☐ **Comments and annotations** on documents

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **@mentions** to notify team members

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Redlining/markup tools** for engineering reviews

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Discussion threads** on specific files

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Distribution & Sharing

- ☐ **Shareable links** with access controls

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Collections/packages** for grouping related assets

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Download format options** (original, PDF conversion, size optimization)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Email notifications** for updates and approvals

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

SECTION 9: Analytics & Reporting

Compliance Reporting

☐ **Document expiration tracking** and alerts

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Approval workflow reports**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Business Intelligence

☐ **Custom report builder**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Dashboard visualizations**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Data export** for external analysis

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

SECTION 10: Implementation & Support

Deployment Options

☐ **Cloud-based deployment**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **On-premises deployment**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Migration & Onboarding

☐ **Data migration support** from legacy systems

Current systems: _____

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Metadata migration** and mapping

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Folder structure migration**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Migration timeline** and project plan

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Phased rollout** capabilities

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Training & Support

☐ **Administrator training**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **End-user training** (live and recorded)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Role-specific training** (engineering, quality, sales, production)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Documentation and knowledge base**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Technical support hours** and channels

Required support hours: _____

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Support SLA** (response time, resolution time)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Dedicated customer success manager**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

SECTION 11: Cost & Business Model

Pricing Structure

☐ **Transparent pricing** (no hidden fees)

- Base platform cost: _____
- Per-user fees: _____
- Storage costs: _____
- **Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Scalability of pricing** as needs grow

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Named vs. concurrent user licensing**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **External user licensing** (suppliers, partners)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Contract Terms

☐ **Contract length** (annual, multi-year, month-to-month)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Exit terms** and data portability

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Price lock** guarantees

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Total Cost of Ownership

☐ **Implementation costs**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Integration costs** (ERP, PLM, etc.)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Customization costs**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Ongoing support and maintenance** fees

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Internal resource requirements** (IT, administration)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

SECTION 12: Vendor Evaluation

Industry Experience

☐ **Manufacturing industry experience**

Years serving manufacturing: _____

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Specific industry segment experience** (automotive, aerospace, industrial equipment, etc.)

Your segment: _____

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Regulatory compliance experience** in your industry

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Company Stability

☐ **Years in business**

☐ **Financial stability**

☐ **Customer retention rate**

☐ **Product development commitment** and roadmap

References & Validation

☐ **Manufacturing customer references** (similar size/complexity)

Requested references: _____

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Case studies** demonstrating manufacturing success

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Industry awards** and recognition

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Decision Matrix

Use this framework to score and compare vendors:

Category	Weight (%)	Vendor A Score (1-10)	Vendor B Score (1-10)	Vendor C Score (1-10)
Product Documentation	%			
Compliance & Quality	%			
Engineering Workflows	%			
Sales Enablement	%			
Supply Chain Support	%			
Technical Requirements	%			
Security & Access	%			
User Experience	%			
Analytics & Reporting	%			
Implementation & Support	%			
Cost & Value	%			
Vendor Credibility	%			
TOTAL WEIGHTED SCORE	100%			

Next Steps

After completing this checklist:

1. **Identify your critical requirements** (mark all "Essential" items)
 2. **Schedule vendor demos** with your top 3-5 candidates
 3. **Prepare use case scenarios** from your actual workflows
 4. **Involve cross-functional stakeholders** (engineering, quality, sales, IT, production)
 5. **Request customer references** in manufacturing
 6. **Conduct pilot testing** with a subset of users and documents
 7. **Calculate total cost of ownership** over 5 years
 8. **Review contracts carefully** (data ownership, exit terms, SLAs, compliance)
 9. **Plan phased implementation** to minimize disruption
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About NetX

NetX provides enterprise digital asset management solutions trusted by leading manufacturers worldwide. Our platform is built to handle the unique demands of manufacturing: complex technical documentation, regulatory compliance, multi-facility coordination, CAD file management, and seamless integration with PLM, ERP, and quality systems.