Cepheo Process Industries Solution

Cepheo Product Documentation Management

Create product documents dynamically and get a full overview.

It is time-consuming to create and maintain the documents you need to support your products and processes and meet the requirements of customers, vendors and regulatory authorities. It is also difficult to give your employees a comprehensive overview of the documents, files and notes that you have in your system.

Cepheo Product Documentation Management addresses both of these issues. You can create and print standardized product and batch documents from within Microsoft Dynamics 365 and give your users an overview of the documentation that has been created, or attached, in the system for a particular record from across your data structure.

Define a flexible data sheet framework for your products

Cepheo Product Documentation Management for Microsoft Dynamics 365 introduces a data sheet framework and advanced capabilities that let you enter, structure and maintain static

system data related to your raw materials or finished goods and then create documentation based on this data.

You can define multiple frameworks for the same product and modify the content that is included in each, based on which customer the goods are being produced for, and on which country you are shipping the goods to.

Create professional, structured documentation dynamically

Based on these data frameworks, you can dynamically create and print three types of product and batch documentation – Data Sheets, Certificates of Conformity and Certificates of Analysis – from within your Microsoft Dynamics 365 system.

The framework lets you control the approval and release status of each document, and language support means that you can generate documents in supported languages as needed.

Advantages

- Save time and resources on document creation and maintenance

- Create professional, structured documentation from within Microsoft Dynamics 365

- Meet the specific documentation requirements of customers, vendors and regulatory authorities

- Support international business with documentation in supported system languages

- Extend standard Microsoft Dynamics 365 Document Handling capabilities

- Define flexible document access options to support daily processes

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Simplify set up, maintenance and use of product data

You can define data sheet frameworks for individual products or for product groups. This significantly reduces the time you need to use on set-up, maintenance and validation of the data that is used in your documentation.

For each framework, you can define which document types should be generated; which information should be used in each document; and in which of the supported languages each document should be generated. The dynamically created documents can then be validated and printed, for example, directly from a new sales order line.

Flexible document access options to support daily processes

With standard Microsoft Dynamics 365 document handling functionality, you can only access documents that are specific to a record when you are viewing that record. With Product Documentation Management, for a specific record, you can define which standard document types you can see from other areas of your solution.

For each viewing location, you can set up multiple Document Groups that define which areas of your Microsoft Dynamics 365 data structure you can view documents from; which types of documentation (files, images, notes, etc.) you can view; and which documents you can see, based on the creation date.

Give employees information to inform daily work processes

By defining Document Groups, you can give your employees a full, intuitive overview of the documentation that is available in the system for the record they are viewing. This will inform and enable their daily work processes.

For example, if Quality Assurance employees need to assess if a particular production batch can be released, they can get an overview of the documents, files, notes, etc., that have been appended during the process that led up to the approval of this batch. From the batch record, they can see, for example, selected document types from Products, Batches, Quality Orders, Quality Order Lines and Quality Order Line Results.

Features

- Built for Microsoft Dynamics 365 Supply Chain Management

- Definition of data sheet frameworks for individual products or product groups

- Modification of individual document content based on the customer and the destination country

- Creation of Data Sheets, Batch Certificates of Conformance (BCOC) and Batch Certificates of Analysis (BCOA)

- Creation, validation and print of documents directly from sales order lines

- Definition of which document types can be viewed from different viewing locations

- Definition of which documents you see, based on document creation date

Read more on cepheo.com

Cepheo empowers businesses to adapt and succeed in a changing world. With locations across the Nordics, and decades of experience in implementing and evolving industry-specific solutions powered by the Microsoft platform, we help our customers use technology and data to make more informed decisions, optimize daily operations and bring out the very best in their people. Learn more at cepheo.com.

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