

# R3 Business Solutions

building modular, reusable solutions for SharePoint

Document  
Set Approval  
Process  
Data Sheet

Name	Description	Category	Stage	Last Approve/Reject
<b>Corporate Presentations (2)</b>				
Company Overview.pptx	Updated for 2009	Presentations	4. Executive Review	Approve
Company Data Sheet.docx	New section with updated customer numbers	Presentations	5. Approved	
<b>New Product Documentation (2)</b>				
R3 Document Set Approval Process v1.1 Getting Started.pdf	Installation - Configuration - Customization	Documentation	4. Executive Review	
Spec Sheet.docx	Includes What's New	Documentation	1. Draft	
<b>TechEd 2009 (3)</b>				
Logos.png	New logo for show	Corporate Images	2. Subject Matter Review	Reject
SoftwareLaunch.pptx	5 slide overview of new software	Presentations	3. Legal Review	Approve
Software Comparison.pptx	Version 2.5 to 3.0	Presentations	2. Subject Matter Review	

This business process application from R3 Business Solutions allows you to create and group documents by a document set and run them through a review and approval process. It is easily customizable to create your own document sets, create new documents and configure your process and notifications.

## Features

- Organize documents in to document sets based on defined data driven criteria
- Process multiple documents for review and approval in one step
- Set up a data driven approval process which can be easily changed
- Automatically send email notification for each step in the process
- Create new documents based on templates stored in document library
- Upload existing documents from local drive or file share
- See all of the documents you've created or uploaded with their current status
- See all of the documents that have been assigned to you for review
- Send email links to one or more documents to anyone in the system
- Reassign one or more documents to another reviewer
- Automatically track the history of documents from creation to final status
- Viewable calendar of when document approvals are due
- Multiple grid displays show various view of documents
- Chart showing status of all in-process documents
- Data driven navigation which can be changed based on user access

## Specifications

- Requires CorasWorks Workplace Suite v10 or AppEngine
- Does not contain additional compiled code to install
- Upload of application requires Site Collection Administrator rights

## Also Available:

### Budget Change Request:

Manage the process of submitting and approving budget change requests allowing funds to be reallocated from one source to another.

**Purchase Request:** Manage the process of entering, reviewing, and approving purchase requests. Documents can be attached throughout the process from submission to archive.

**Travel Request:** Manage the process of submitting and approving travel requests. Managers can set expense limits and a shared calendar is available to see who is traveling.

**Time-Off Request:** Manage the process of submitting and approving time-off requests. Submissions can be organized by type (vacation, sick, personal). Approved requests can be published to a shared calendar.

### R3BS Business Process Suite:

Includes the following applications integrated with a dashboard

- Budget Change Request
- Purchase Request
- Time-Off Request
- Travel Request

Instantly see all of the work assigned to you for review as well the status of requests you've already submitted.

To learn more, please contact:

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