

# RSM 365 DOCUMENT MANAGER FOR SERVICENOW



The 365 Document Manager is a RSM solution built for ServiceNow that allows users to collaborate on documents hosted in Microsoft SharePoint or Teams from within records in ServiceNow. Teams or SharePoint sites can be linked to ServiceNow records, allowing for a seamless document management experience.

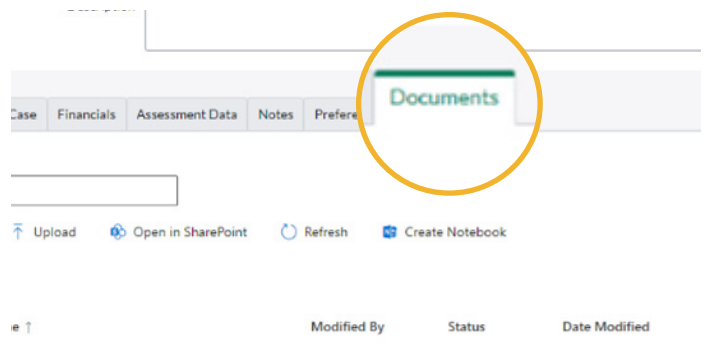
## 365 Document Manager

Leverage the power of Microsoft Document Management directly within ServiceNow. Link SharePoint or Team sites and manage documents from any configured ServiceNow record. Create folders, upload documents, create OneNote Notebooks, and collaborate on documents without leaving ServiceNow. Improve document discovery for users, and never lose the location of a critical SharePoint site again.

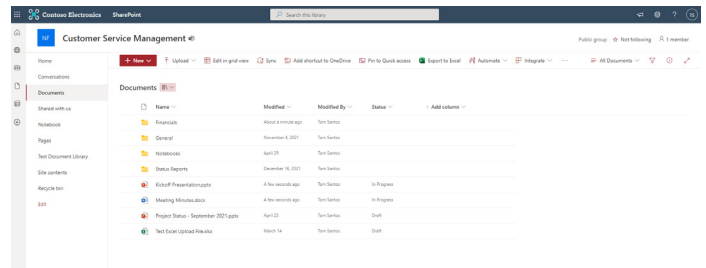
## Cross-Platform Document Access

For advanced features and collaboration, access the same folders and documents in real-time in SharePoint or Microsoft Teams. ServiceNow will honor permissions and roles setup in Microsoft 365, making it easy to apply governance and giving users the flexibility to collaborate on documents in the platform of their choice.

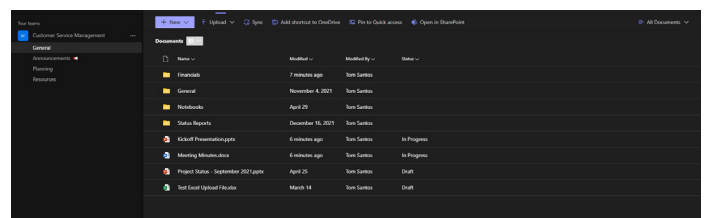
Microsoft Co-Authoring allows users to access the same documents from ServiceNow, SharePoint, or Teams and collaborate at the same time.



## Sharepoint view

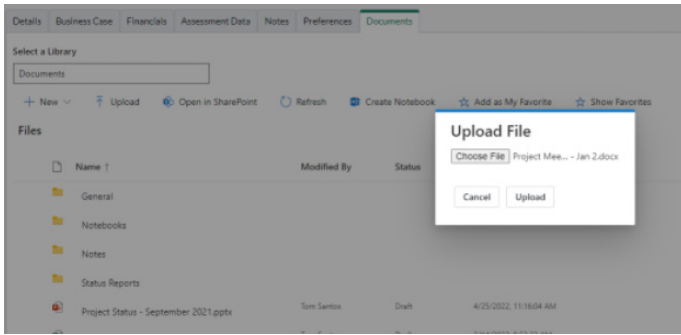


## Teams view



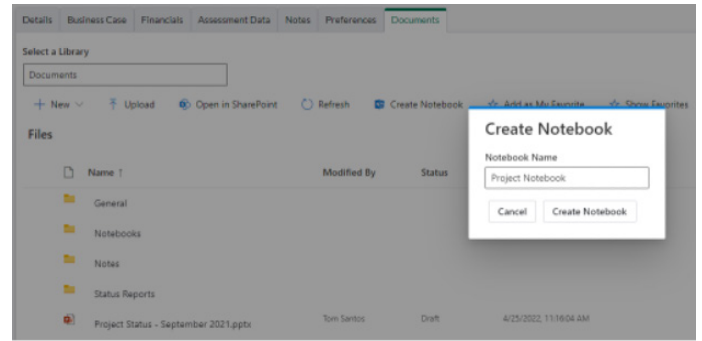
## Upload File

Add files directly from the ServiceNow record without having to navigate to Microsoft 365.



## Create OneNote Notebooks

Create OneNote Notebooks directly from ServiceNow.



## Features

- **Embed on any Form** – The Document Manager is “Table Agnostic” and can be added to the standard form of any ServiceNow table or view. A standard installation includes the following:
  - Delivery of a setup guide, and a live training session if desired, on how to perform setup on additional tables/forms in the future.
- **Link Record to Documents** – A ServiceNow record can be linked to a Teams or SharePoint site. For instance, ServiceNow Project can be linked to the project's SharePoint site, and users can then view and interact with all project documents directly within ServiceNow.
- **View All Document Libraries** – The Document Manager allows access to all document libraries within a designated SharePoint site.
- **File Management** – The Document Manager allows users to create folders, upload files, refresh the app to load changes, and open documents all from within ServiceNow.
- **Permissions** – The Document Manager honors all permissions applied to a SharePoint or Teams site.
- **Open in SharePoint** – For advanced document management features, users can quickly open a browser to the linked SharePoint site.
- **OneNote Integration** – Users can create OneNote Notebooks directly from the ServiceNow record.

### Additional Options

- Additional tables/forms
- Automation of SharePoint Site creation
- Automation of OneNote creation
- Automation of standard folder taxonomy creation

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