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Smartsheet Administration

Creating an efficient experience for everyone

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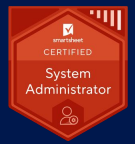
Quan To
Principal Product Manager



Kevin Claus
Senior Software Engineer

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Where are you on your **Smartsheet Administration** journey?

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Agenda

1. Manage users
   Make it easy for your users to get started and collaborate.
2. Understand usage
   Understand what's going on in your environment.
3. Manage advanced settings and branding
   Make it feel like home.

1

Manage Users

Make it easy for your users to get started and collaborate.

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Meet Alex

Project Manager

- Company just bought a plan
- Smartsheet champion
- System Administrator by default
- **Needs to:**
  - Give users right level of access to the solution
  - Keep accounts protected and secure
  - Create groups for company projects for easy sharing and access

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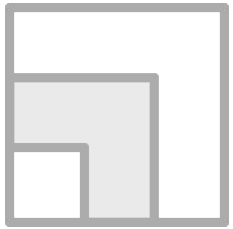
Manage users

Available on Business and Enterprise plans

Smartsheet Admin Center

User and group Management



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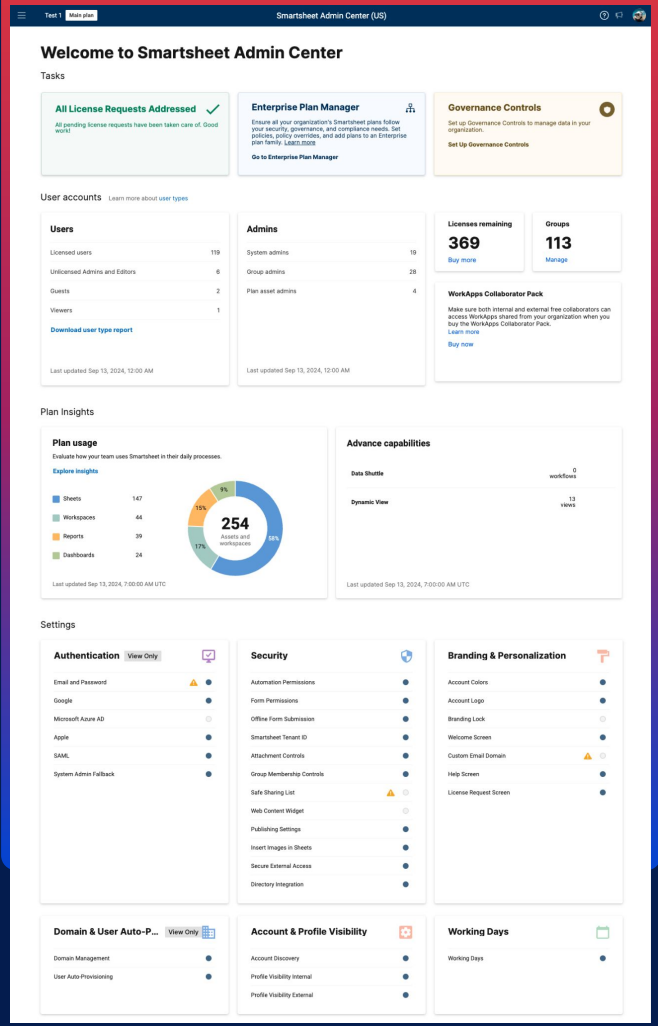
Admin Center overview

Admin Center allows System Admins and Group Admins to administer and govern their Smartsheet account.

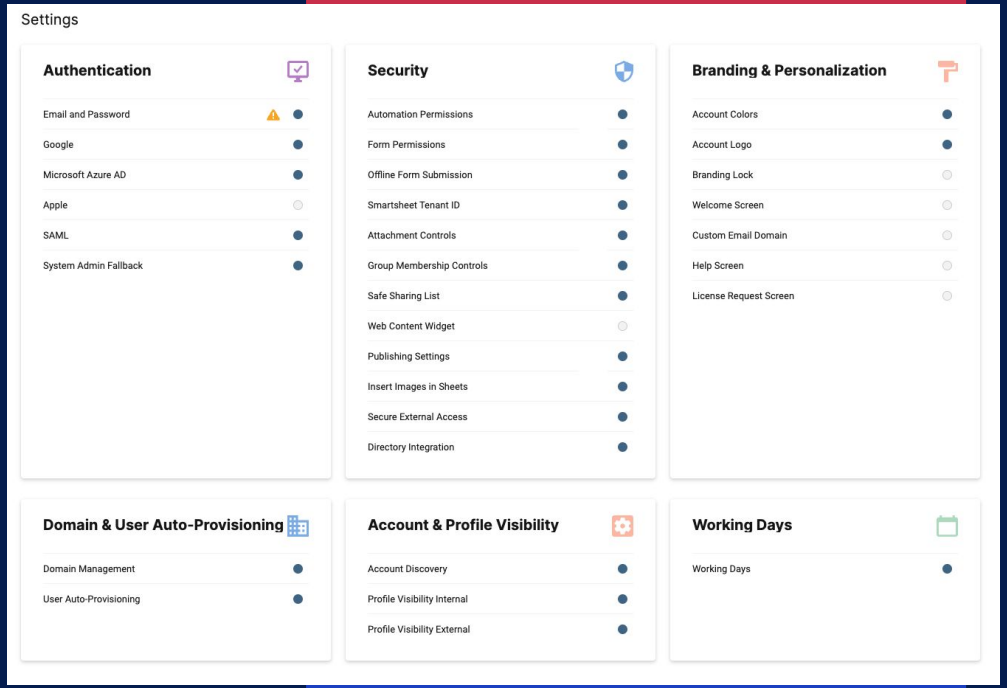
Admin Center provides the ability to manage users, groups, and license requests, as well as see plan usage and an overview of account settings.



Global Account Settings

You can use Account Settings to control certain features for all Smartsheet users in your organization.

Settings shown within the Admin Center are plan-dependent.



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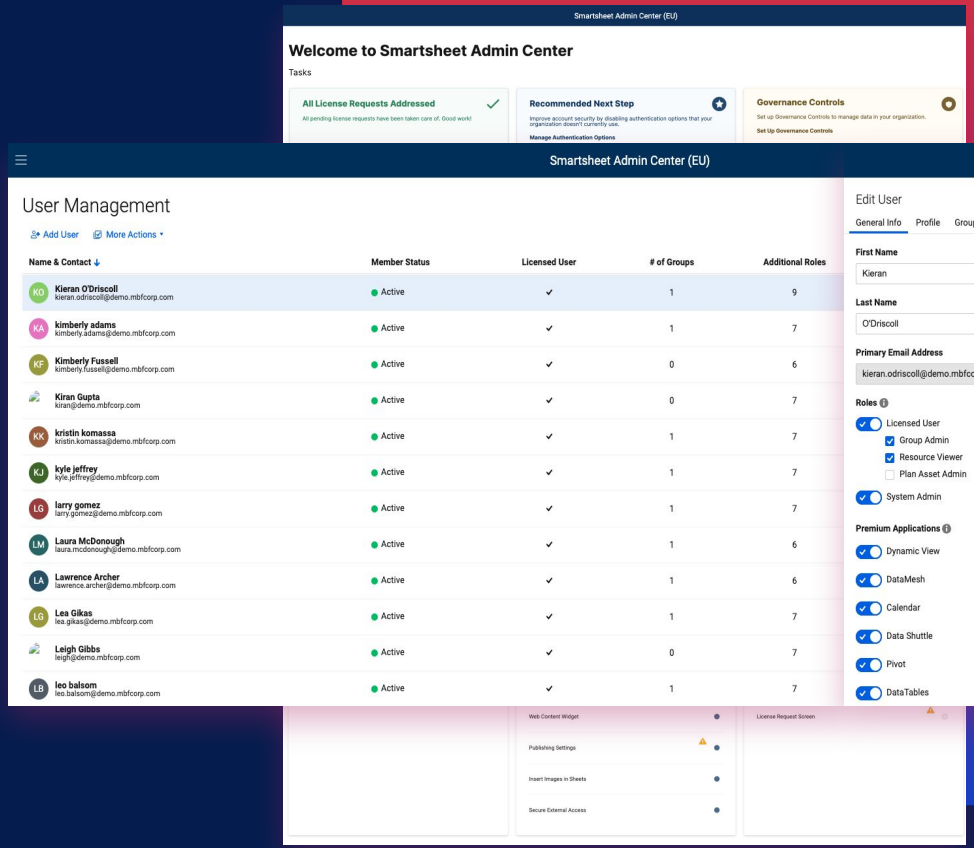
What are SysAdmins?

SysAdmins, or System Admins, are responsible for managing users, groups, policies, and settings in Smartsheet.

Smartsheet supports and recommends the assignment of multiple System Admins to ensure business continuity.



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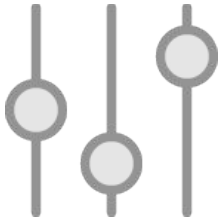
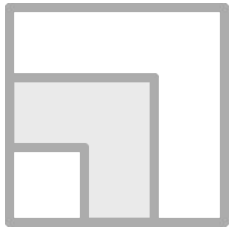
Manage users

Available on Business and Enterprise plans



Smartsheet Admin Center

User and group Management



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Permission-based user types

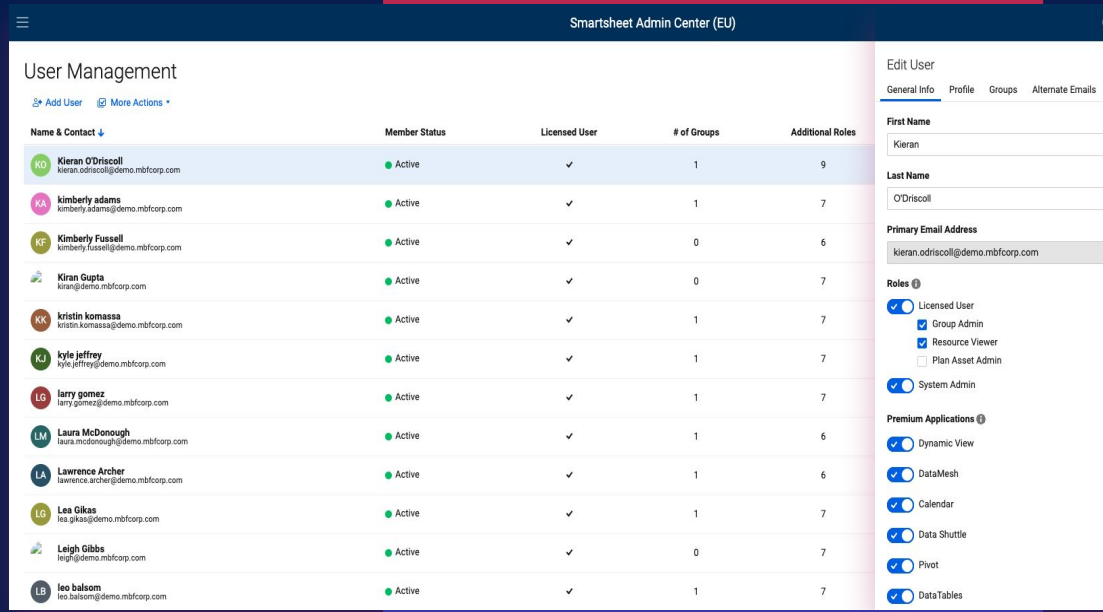
User type	Internal or external	What can they do?
Viewer	Internal or external	Users who have only Viewer permissions on assets
Guest	External	Users who have Commenter or Editor permissions on one or more assets
Unlicensed Admin and Editor	Internal or external	Users who have Admin permissions on one or more assets.
Licensed User	Internal or external	Users who have been assigned a license. They can have full access permission.

User Management

User Management shows a list of all Smartsheet users in your plan and their roles.

Roles give users the permissions for different aspects of Smartsheet.

- Assign or remove licenses
- Add, remove or deactivate users
- Edit a user's details
- Update roles



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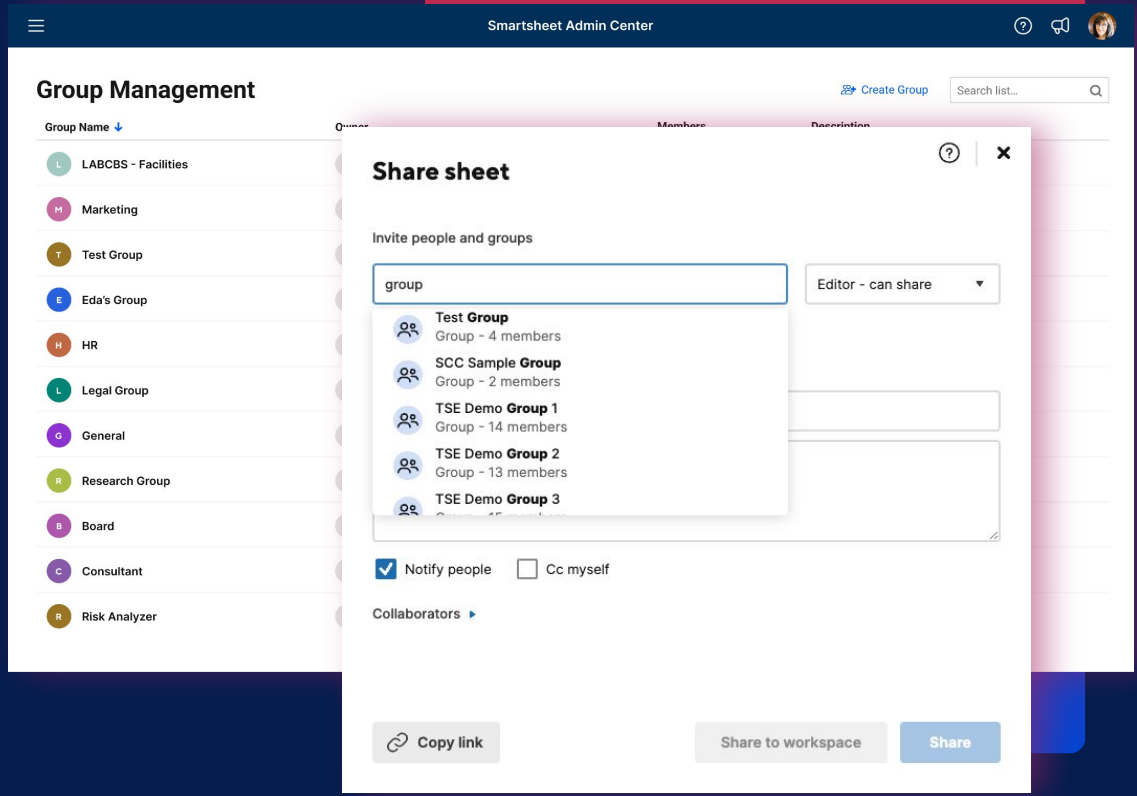
Group Admins

Group Admins create and manage groups.

Groups in Smartsheet enable quick and easy access control Smartsheet items.

Groups allows new employees to get up and running faster.



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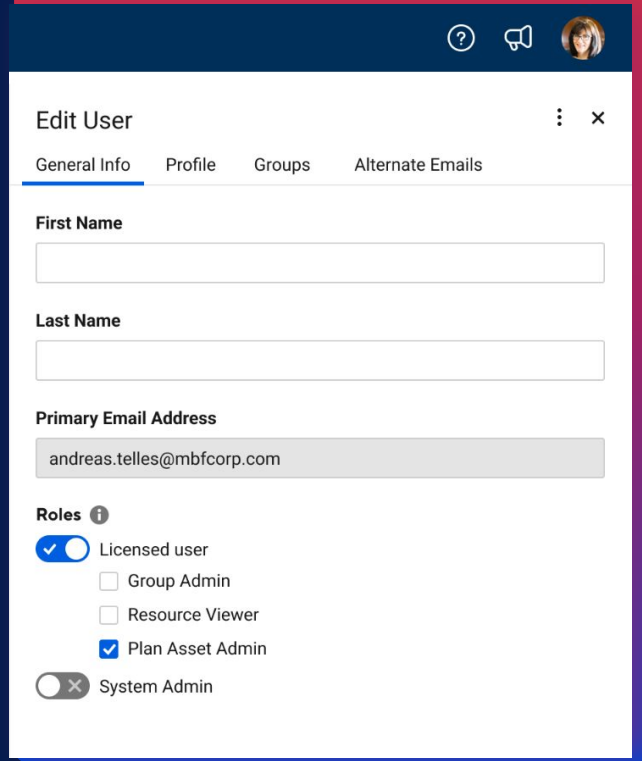
Plan Asset Admins

Plan Asset Admins manage access requests on items where no other user has Owner or Admin permissions.



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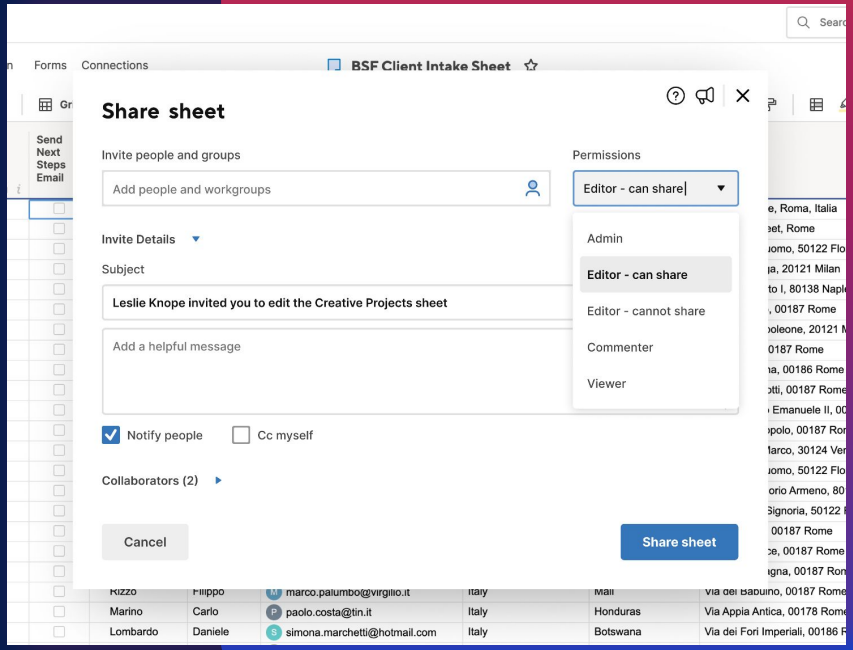
Item-level permissions

Item-level permissions apply to Sheets, Reports, Dashboards, Workspaces and Workapps:

- Owner*
- Admin
- Manager**
- Editor can share
- Editor cannot share
- Commenter
- Viewer

Groups can also be shared to assets for improved efficiency.



* * Removing soon

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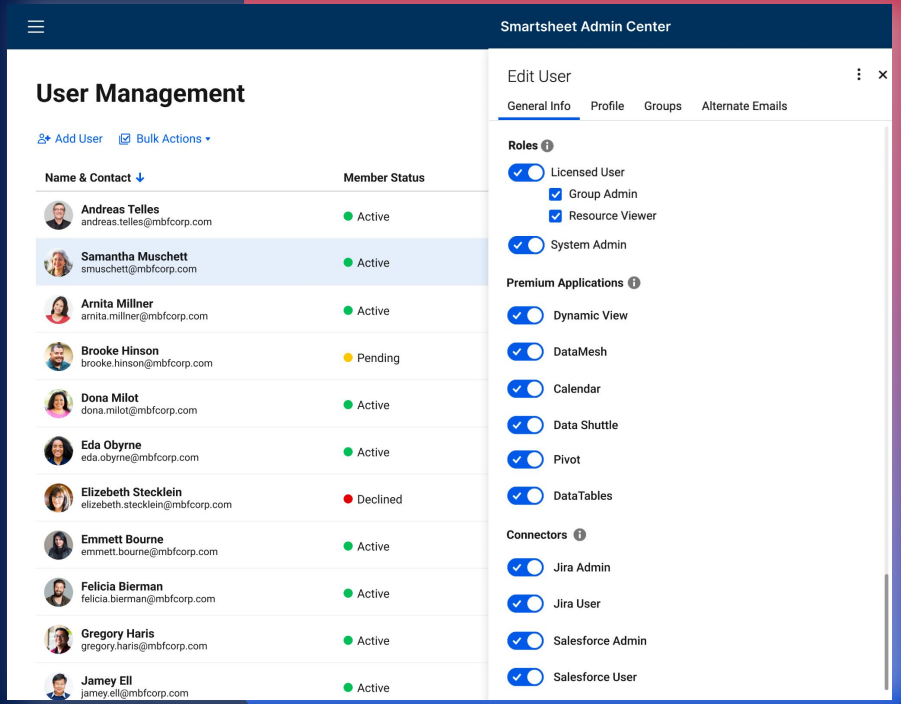
Advance capabilities

Enable access for users to Premium Applications:

- Dynamic View
- DataMesh
- Calendar
- Data Shuttle
- Pivot
- DataTable

Enable users to be Jira or Salesforce Connector Admins



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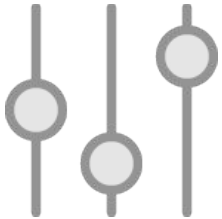
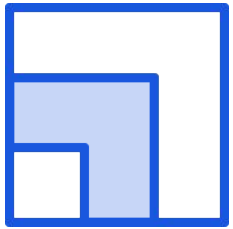
Manager users

Available on Business and Enterprise plans



Smartsheet Admin Center

User and group management



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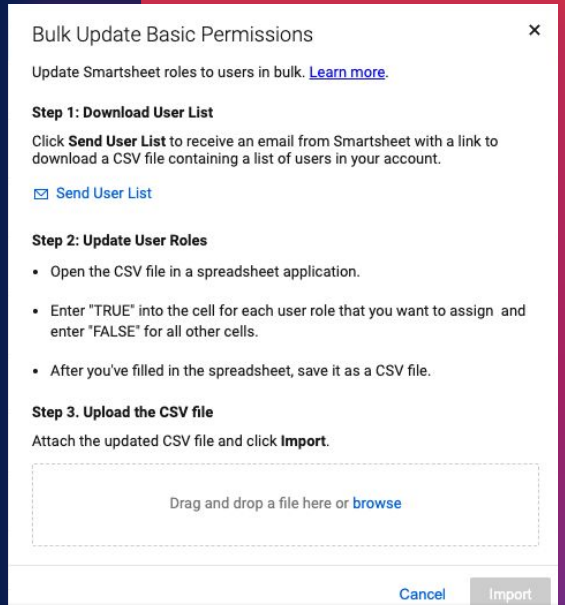
Bulk Update Permissions

User Management features in Admin Center allow both Basic Permissions and Premium App Permissions to be updated in bulk.



Email	Sys Admin	Group Admin	Licensed User	Resource Viewer
bob@acme.com	TRUE	TRUE	TRUE	TRUE
fred@acme.com	FALSE	FALSE	TRUE	TRUE
james@acme.com	FALSE	FALSE	TRUE	TRUE
mary@acme.com	TRUE	TRUE	TRUE	TRUE

APIs

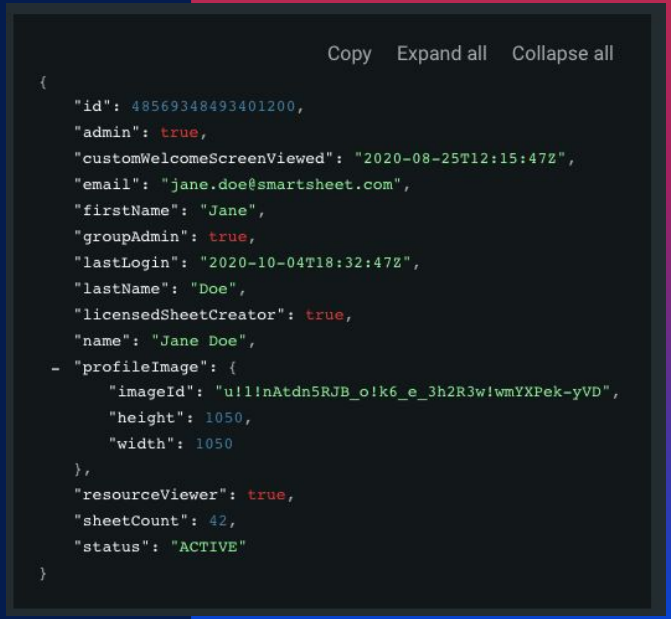
Automate by leveraging User Management and Group Management APIs

Users:

List, Add, Get, Remove, Update, Deactivate

Groups:

List, Add, Get, Update, Delete



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Directory Integration

Synchronize existing enterprise directory services with Smartsheet to provision and deprovision users, and share user metadata:

- Microsoft Entra ID *(formerly Azure Active Directory)*
- Okta

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POP QUIZ #1

Which Admin role does NOT need to be a licensed user?

a. System Admin

b. Plan Asset Admin

c. Group Admin

POP QUIZ #1

Which Admin role does NOT need to be a licensed user?

a. System Admin

b. Plan Asset Admin

c. Group Admin

2

Understand usage

Be safe. Sleep well.

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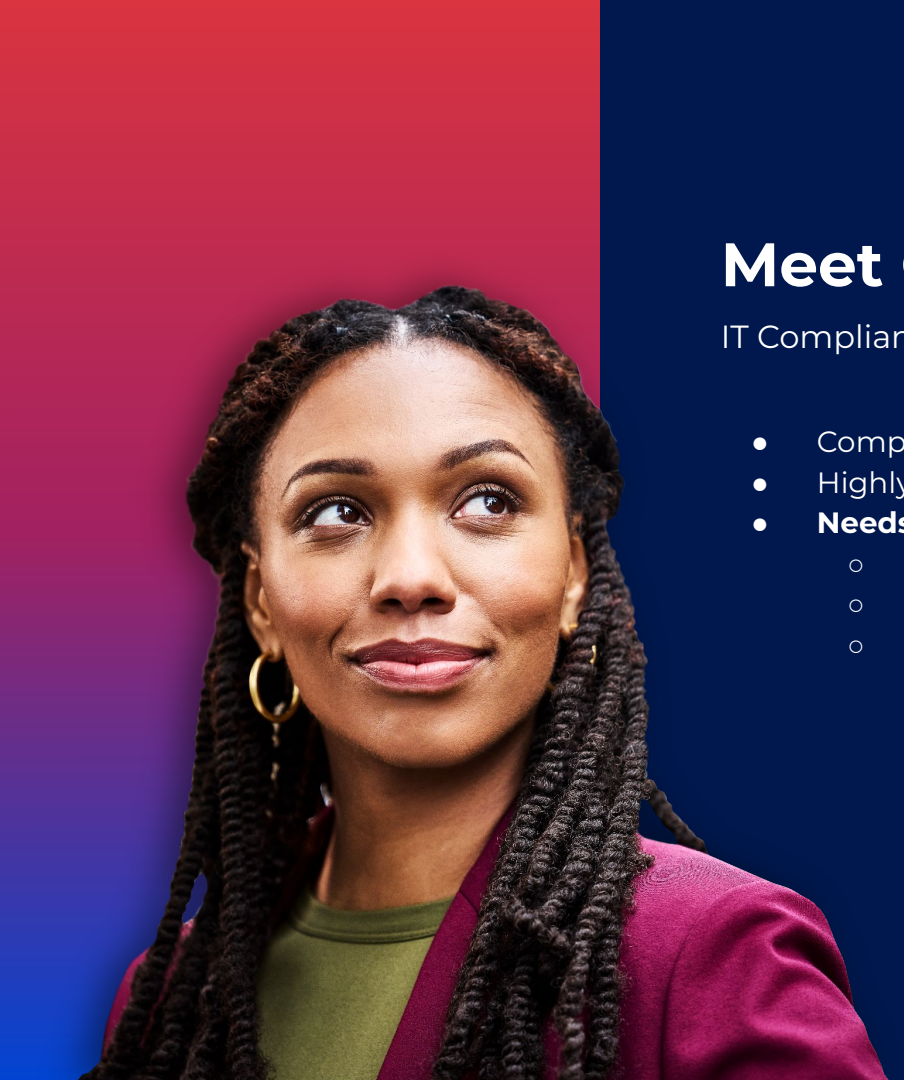

Meet Charlie

IT Compliance Officer

- Company has government contracts, handling sensitive data
- Highly regulated industry
- **Needs to:**
  - Understand how Smartsheet is being used
  - Monitor detailed event reporting to check for bad actors
  - Understand what's being shared externally

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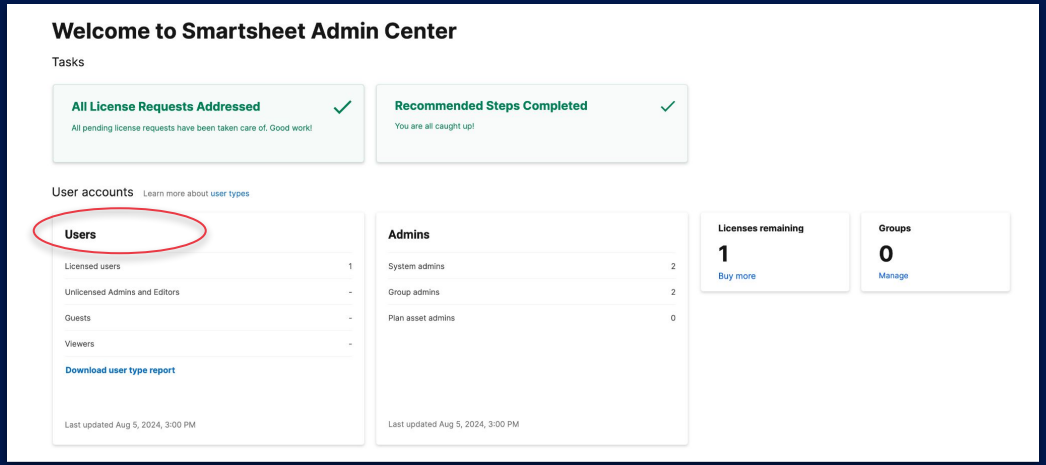
Utilize reports

Available above Enterprise plans

Admin reports

Plan Insights

Event Reporting



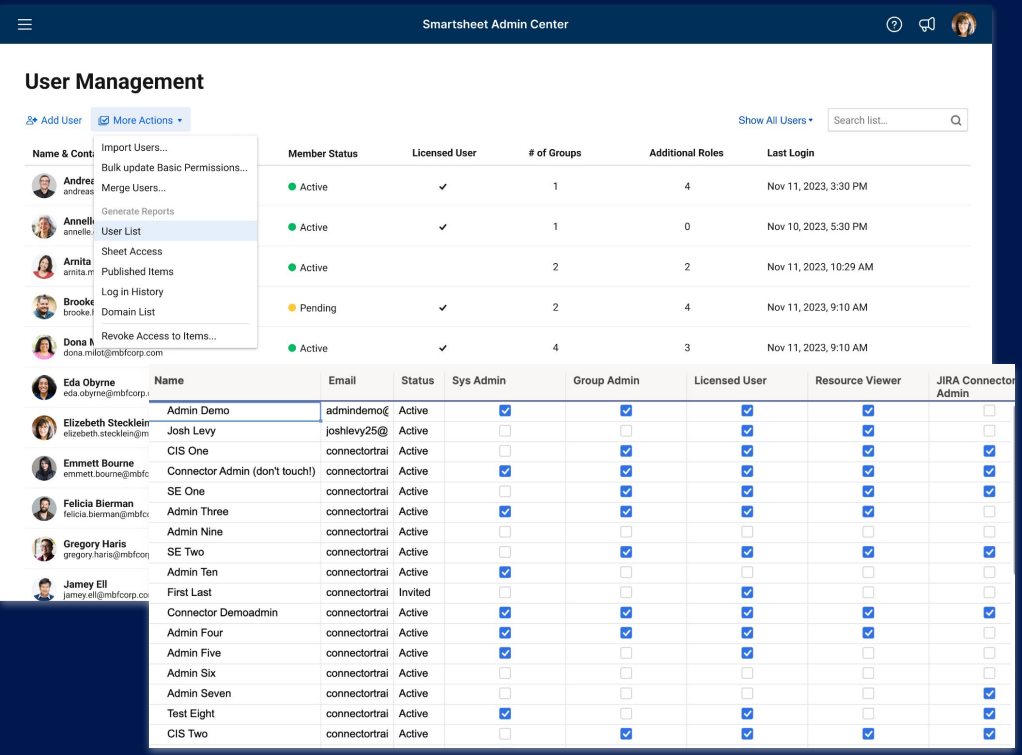
User type report

Get a deep understanding of usage for each user in your company

View a list of all your users based on their permission-based user type and activity, with fields like:

- Email
- User Domain
- User Type
- Admin Type
- Items Shared with
- Highest permission
- Last Activity
- Count of items with Viewer, Editor, Admin permissions
- Items Views, Comments, Edits (last 90, 180, 270, 365 days)
- Items created (last 90, 180, 270, 365 days)

Email	User Domain	User Type	System Admin	Group Admin	Plan Asset Admin	Number of assets shared with user	Highest permission given on assets	Number of assets with Viewer permissions	Number of assets with Editor or Commentor permissions	Number of assets with Admin permissions	Last activity	Number of asset v
bob@mbfcorp.com	External	Licensed User	Yes	Yes		0	[[Blank]]	0	0	0		
sal@mbfcorp.com	Internal	Unlicensed Admin and Editor				2	Commenter	0	2	0		
jason@mbfcorp.com	Internal	Licensed User	Yes	Yes		21	Owner	0	0	21	2024-07-29	



User list report

Understand who's been accessing your Smartsheet environment

View a list of all your users (licensed and unlicensed), number of groups they're in, additional roles and the last time they logged in:

- Email
- Member status
- Licensed user
- # of groups
- Additional roles
- Last login

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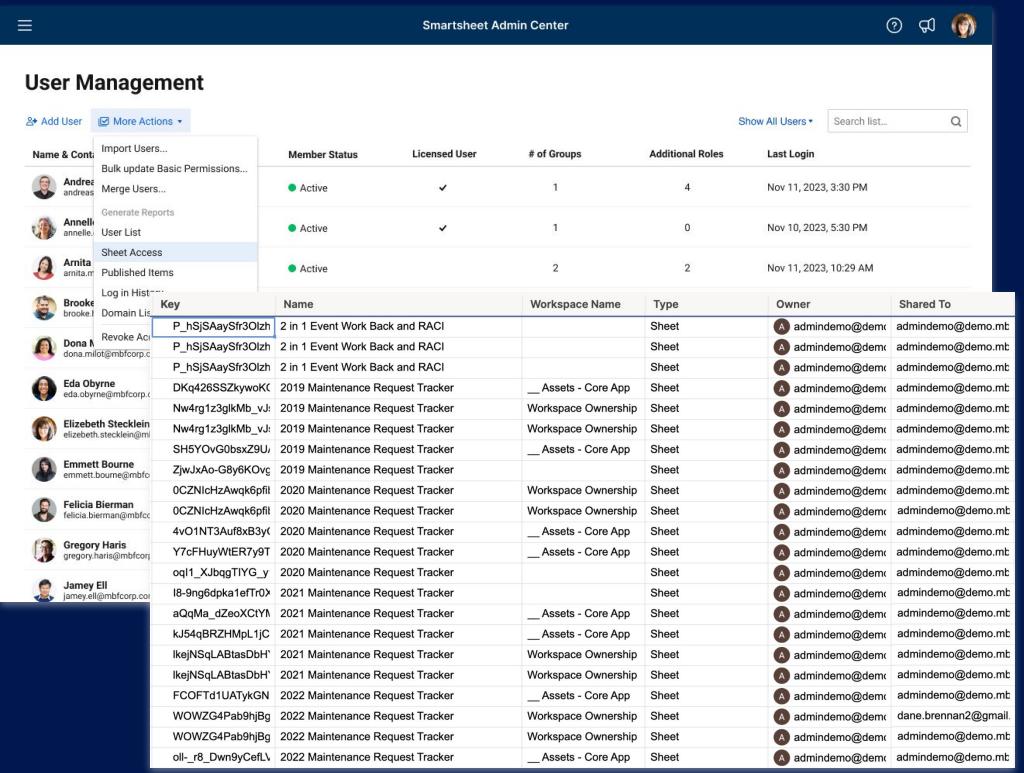

Sheet access report

Understand who can access your data

View a comprehensive list of who and what permissions they have to your sheets:

- Sheet key
- Sheet name
- Sheet owner
- Workspace name
- Shared to (permission)
- Last modified date/time

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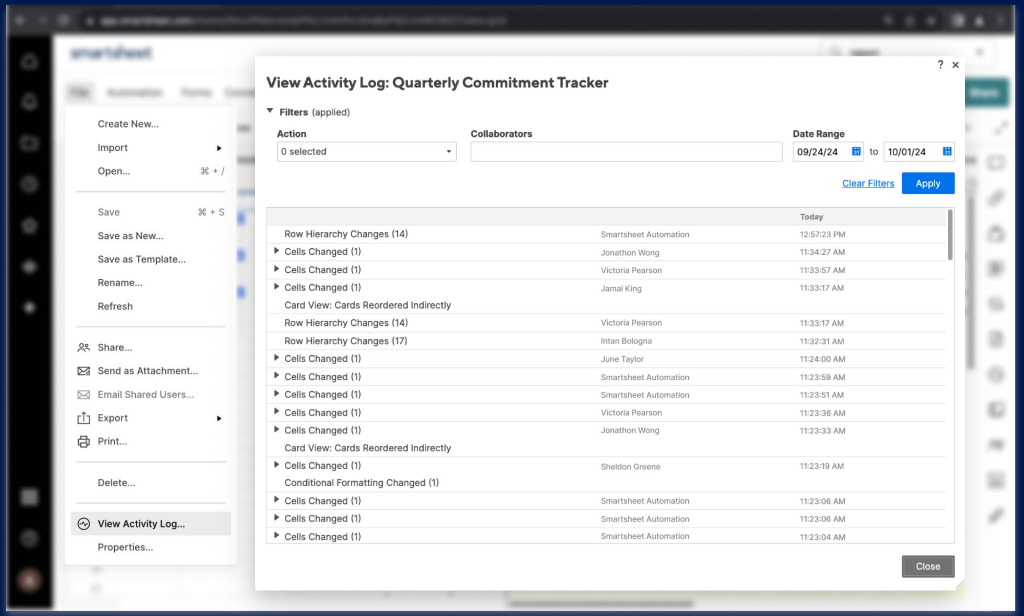

Sheet-level activity log

Understand exactly what change to your asset and by who

View user activity in a sheet or who last viewed a dashboard:

- Action
- User
- Date / time

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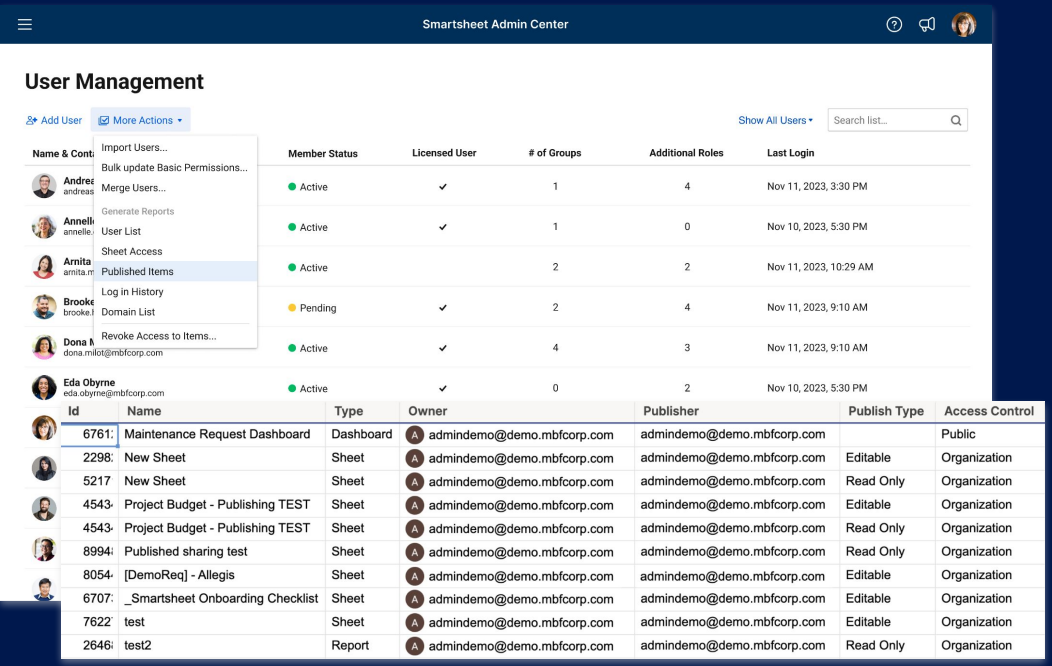

Id	Name	Type	Owner	Publisher	Publish Type	Access Control
6761	Maintenance Request Dashboard	Dashboard	admindemo@demo.mbfcorp.com	admindemo@demo.mbfcorp.com		Public
2298	New Sheet	Sheet	admindemo@demo.mbfcorp.com	admindemo@demo.mbfcorp.com	Editable	Organization
5217	New Sheet	Sheet	admindemo@demo.mbfcorp.com	admindemo@demo.mbfcorp.com	Read Only	Organization
4543	Project Budget - Publishing TEST	Sheet	admindemo@demo.mbfcorp.com	admindemo@demo.mbfcorp.com	Editable	Organization
4543	Project Budget - Publishing TEST	Sheet	admindemo@demo.mbfcorp.com	admindemo@demo.mbfcorp.com	Read Only	Organization
8994	Published sharing test	Sheet	admindemo@demo.mbfcorp.com	admindemo@demo.mbfcorp.com	Read Only	Organization
8054	[DemoReq] - Allegis	Sheet	admindemo@demo.mbfcorp.com	admindemo@demo.mbfcorp.com	Editable	Organization
6707	_Smartsheet Onboarding Checklist	Sheet	admindemo@demo.mbfcorp.com	admindemo@demo.mbfcorp.com	Editable	Organization
7622	test	Sheet	admindemo@demo.mbfcorp.com	admindemo@demo.mbfcorp.com	Editable	Organization
2646	test2	Report	admindemo@demo.mbfcorp.com	admindemo@demo.mbfcorp.com	Read Only	Organization

Published items report

Understand which assets you own are publicly shared to the world

View a list of assets that were published:

- Name
- Type
- Owner
- Publisher
- Publish type
- Access control
- Publish link
- Last modified

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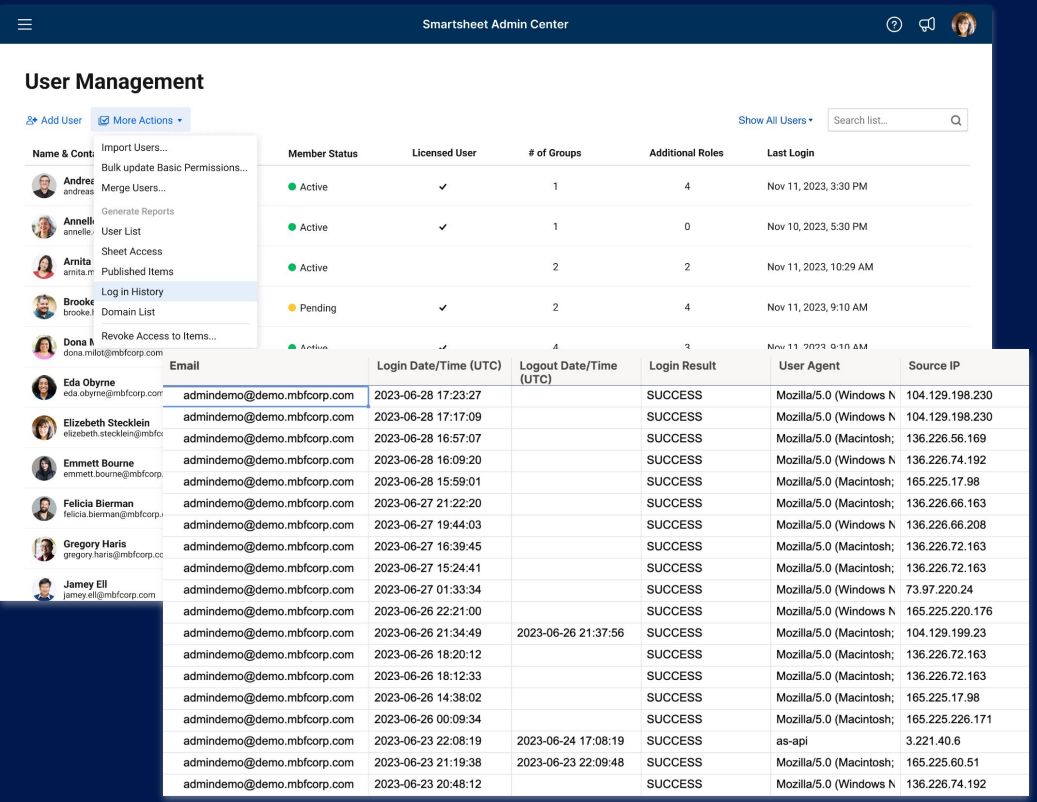

Email	Login Date/Time (UTC)	Logout Date/Time (UTC)	Login Result	User Agent	Source IP
admindemo@demo.mbfcorp.com	2023-06-28 17:23:27		SUCCESS	Mozilla/5.0 (Windows N	104.129.198.230
admindemo@demo.mbfcorp.com	2023-06-28 17:17:09		SUCCESS	Mozilla/5.0 (Windows N	104.129.198.230
admindemo@demo.mbfcorp.com	2023-06-28 16:57:07		SUCCESS	Mozilla/5.0 (Macintosh;	136.226.56.169
admindemo@demo.mbfcorp.com	2023-06-28 16:09:20		SUCCESS	Mozilla/5.0 (Windows N	136.226.74.192
admindemo@demo.mbfcorp.com	2023-06-28 15:59:01		SUCCESS	Mozilla/5.0 (Macintosh;	165.225.17.98
admindemo@demo.mbfcorp.com	2023-06-27 21:22:20		SUCCESS	Mozilla/5.0 (Macintosh;	136.226.66.163
admindemo@demo.mbfcorp.com	2023-06-27 19:44:03		SUCCESS	Mozilla/5.0 (Windows N	136.226.66.208
admindemo@demo.mbfcorp.com	2023-06-27 16:39:45		SUCCESS	Mozilla/5.0 (Macintosh;	136.226.72.163
admindemo@demo.mbfcorp.com	2023-06-27 15:24:41		SUCCESS	Mozilla/5.0 (Macintosh;	136.226.72.163
admindemo@demo.mbfcorp.com	2023-06-27 01:33:34		SUCCESS	Mozilla/5.0 (Windows N	73.97.220.24
admindemo@demo.mbfcorp.com	2023-06-26 22:21:00		SUCCESS	Mozilla/5.0 (Windows N	165.225.220.176
admindemo@demo.mbfcorp.com	2023-06-26 21:34:49	2023-06-26 21:37:56	SUCCESS	Mozilla/5.0 (Macintosh;	104.129.199.23
admindemo@demo.mbfcorp.com	2023-06-26 18:20:12		SUCCESS	Mozilla/5.0 (Macintosh;	136.226.72.163
admindemo@demo.mbfcorp.com	2023-06-26 18:12:33		SUCCESS	Mozilla/5.0 (Macintosh;	136.226.72.163
admindemo@demo.mbfcorp.com	2023-06-26 14:38:02		SUCCESS	Mozilla/5.0 (Macintosh;	165.225.17.98
admindemo@demo.mbfcorp.com	2023-06-26 00:09:34		SUCCESS	Mozilla/5.0 (Macintosh;	165.225.226.171
admindemo@demo.mbfcorp.com	2023-06-23 22:08:19	2023-06-24 17:08:19	SUCCESS	as-api	3.221.40.6
admindemo@demo.mbfcorp.com	2023-06-23 21:19:38	2023-06-23 22:09:48	SUCCESS	Mozilla/5.0 (Macintosh;	165.225.60.51
admindemo@demo.mbfcorp.com	2023-06-23 20:48:12		SUCCESS	Mozilla/5.0 (Windows N	136.226.74.192

Login history

Audit who and where your users are coming from

View a report of which users have logged into your Smartsheet plan:

- Email
- Login date/time
- Logout date/time
- Login result
- User Agent String
- Source IP

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Utilize reports

Available above Enterprise plans

Admin reports

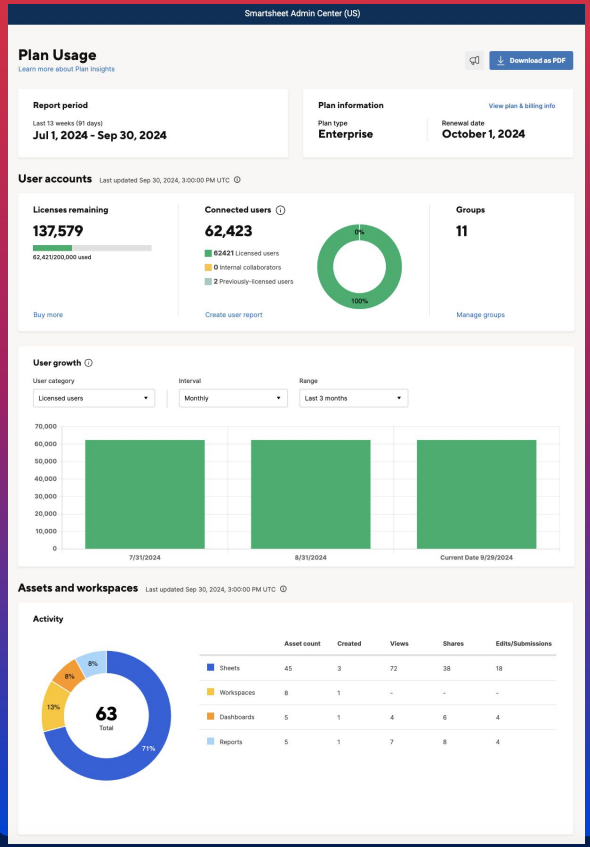
Plan Insights

Event Reporting

Plan Insights

The Plan Usage dashboard helps you evaluate how your team uses Smartsheet in their daily processes, and offers information, key metrics, and trends on:

- Plan information
- Licenses and Connected User counts
- Groups
- User growth
- Item creation
- Advance capability evaluations



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Utilize reports

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Event Reporting

Event reporting

Passive monitoring for deep insights into Smartsheet users and usage

Export a feed of all Smartsheet events to pull into dedicated SIEM or CASB tools.

Gain visibility into 100+ account action events including:

- Item creation and deletion
- Sharing Sheets
- Publishing Sheets
- Commenting
- Creating new Workspaces
- Attachment upload and downloads

Example: Event object


```
{
  "eventId" : "4b12345abc444def333g149he2b15b3j",
  "objectType" : "SHEET",
  "action" : "CREATE",
  "objectId" : 345678901234,
  "eventTimestamp" : "2019-04-29T08:28:33Z",
  "userId" : 123457654321,
  "requestUserId" : 133445566778,
  "source" : "WEB_APP",
  "additionalDetails" : {
    "sheetName" : "Test Sheet"
  }
}
```


Skyhigh Security

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Expansion of event coverage in Event Reporting

Get even more event information from Smartsheet

- Our goal is for Event Reporting to become the single source of truth for all event activity.
- We plan on adding more events to Event Reporting around:
  - *Advance capabilities* (Data Shuttle, Dynamic View, DataTable, DataMesh, etc.)
  - *Core capabilities* (e.g., automated workflows)
  - *Policy and administration related activities* (Admin Center updates, policy updates and enforcement, etc.)

POP QUIZ #2
Which report shows Source IP Addresses?

a. Sheet access report

b. Login history report

c. User list report

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POP QUIZ #2
Which report shows Source IP Addresses?

a. Sheet access report

b. Login history report

c. User list report

3

Manage advanced settings and branding

Make it feel like home.

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Meet Bobbie

IT Ops Team Leader

- One of two SysAdmins
- Manage growth of departments
- **Needs to:**
  - Ensure users adopt tool
  - Ensure security and governance policies align across company
  - Ensure consistent experience for all users

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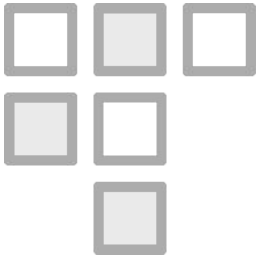
Manage advanced settings and branding

Available on Enterprise and Advance plans

User auto-provisioning

Enterprise access controls



Customization

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User Auto-Provisioning

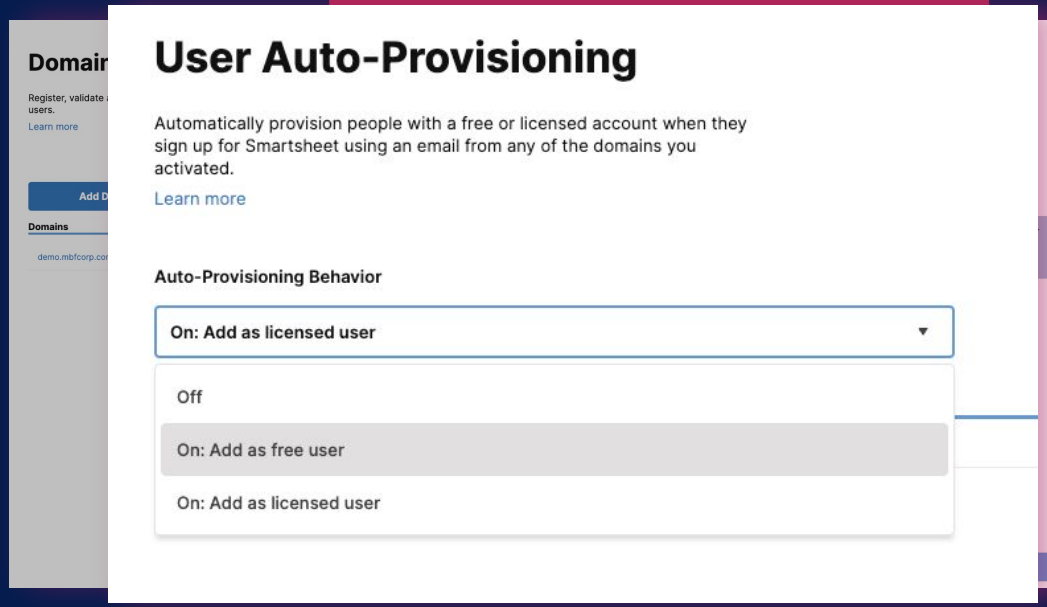
Automate user management

Enable new users from your company to automatically be provisioned

- Licensed or Unlicensed User

Prevent plan proliferation

Requires domain validation



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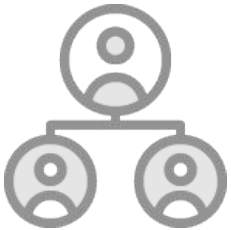
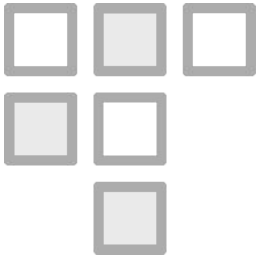
Manage advanced settings and branding

Available on Enterprise and Advance plans



User auto-provisioning

Enterprise access controls



Customization

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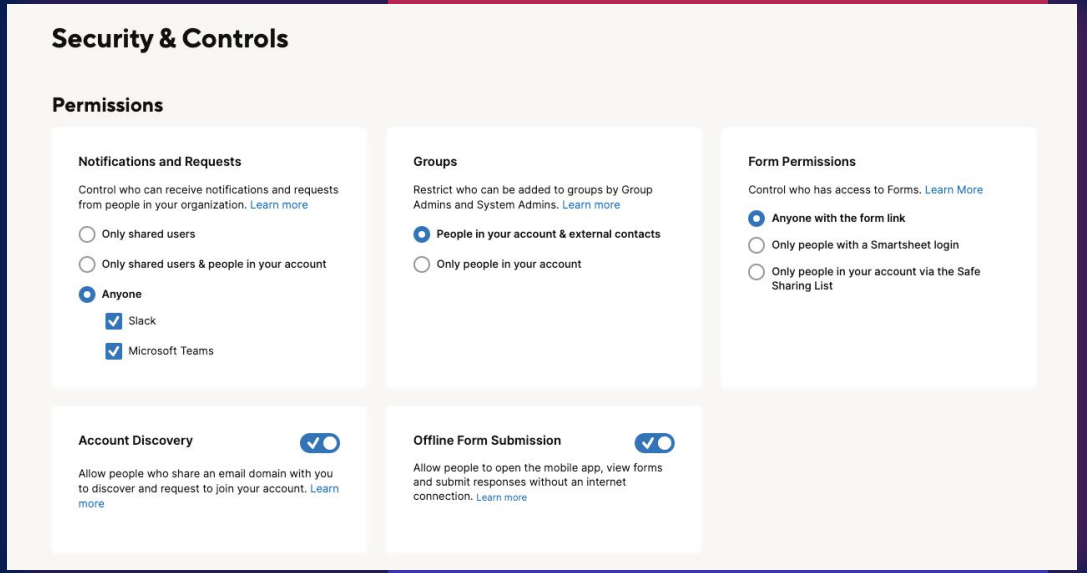
Access controls

What do you actually need?

Granular control over visibility outside your organization:

- Automated workflow notifications
- Group membership
- Form link sharing
- Assigning licenses
- Offline forms



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Safe sharing

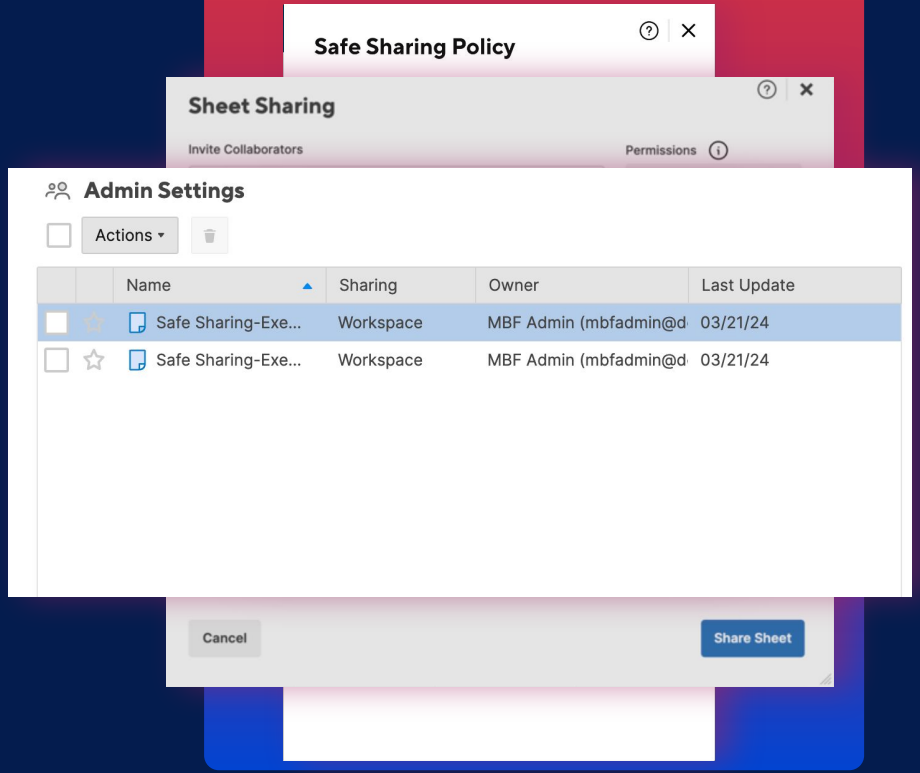
Hands off the goodies

Define an allowed list of domains and emails to:

- Remove access restrictions for known entities
- Allow sharing of:
  - Sheets
  - Reports
  - Dashboards
  - Workflows
  - Workspaces / WorkApps

Link to custom form for sharing requests

Automate updating list using the Sheets API



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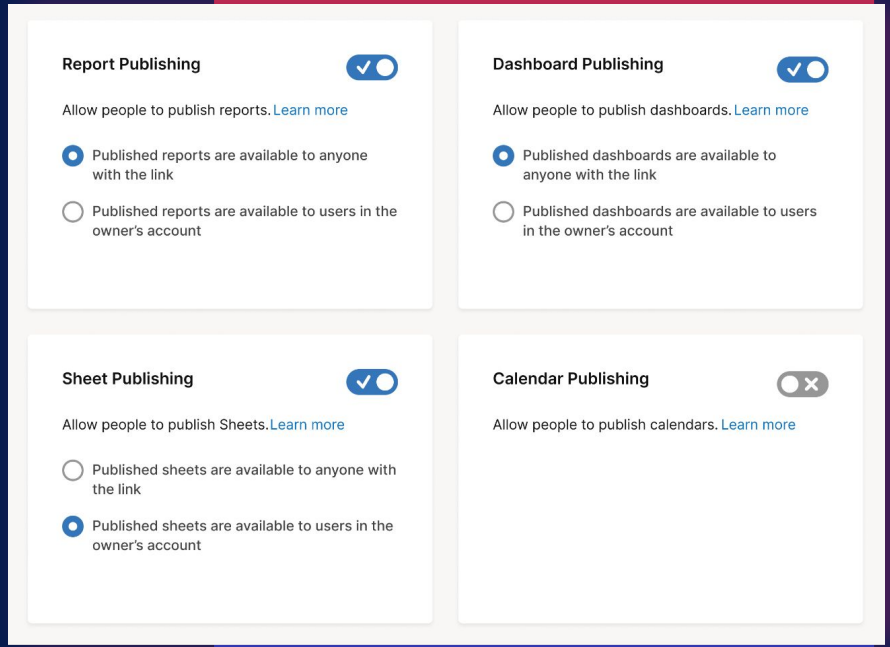
Publishing restrictions

Gatekeeping at its best

Configure what can be published:

- Reports
- Sheets
- Dashboards
- Calendars



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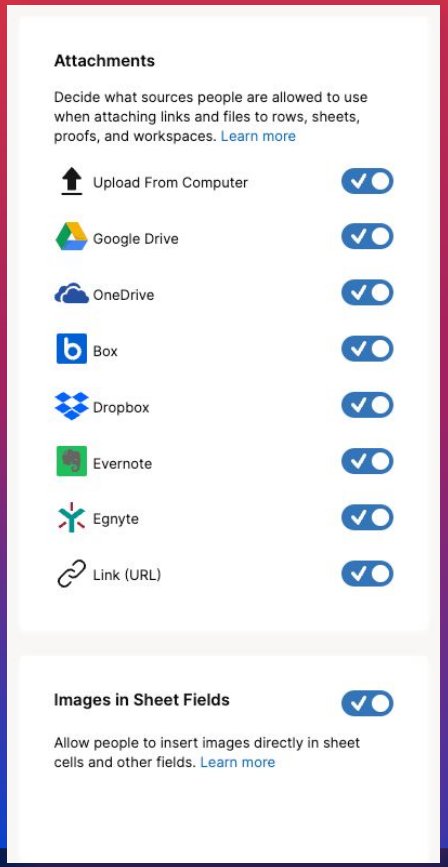
Attachments restrictions

Only attach from trusted sources

Choose allowed data sources for attachments:

- Local/PC
- Cloud
- URLs
- Image files in cells



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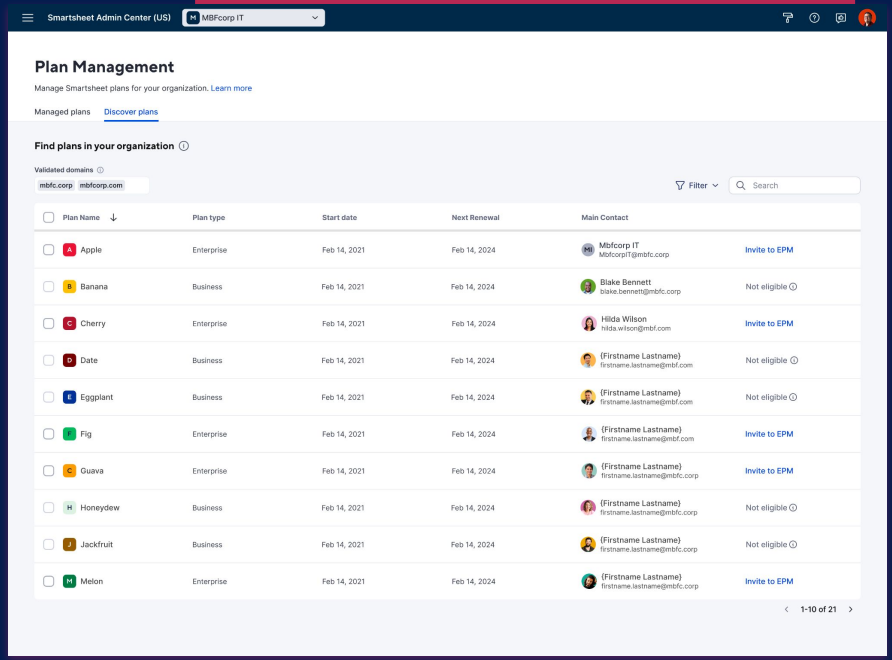
Enterprise Plan Manager (EPM)

Manage users and policies across plans

Companies with multiple plans need a single place to manage their users and policies across plans.

Today, we are in Private Beta for EPM v2 which will support:

- Self service creation
- Plan discovery
- Child plan override
- SSO, User Auto Provisioning, User Movement Policy, Publishing/sharing settings and Safe Sharing policies



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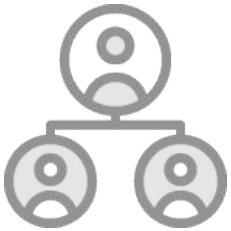
Manage advanced settings and branding

Available on Enterprise and Advance plans



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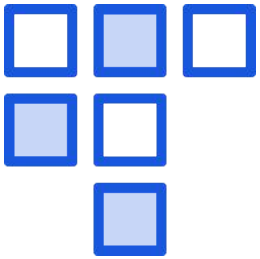

Customization

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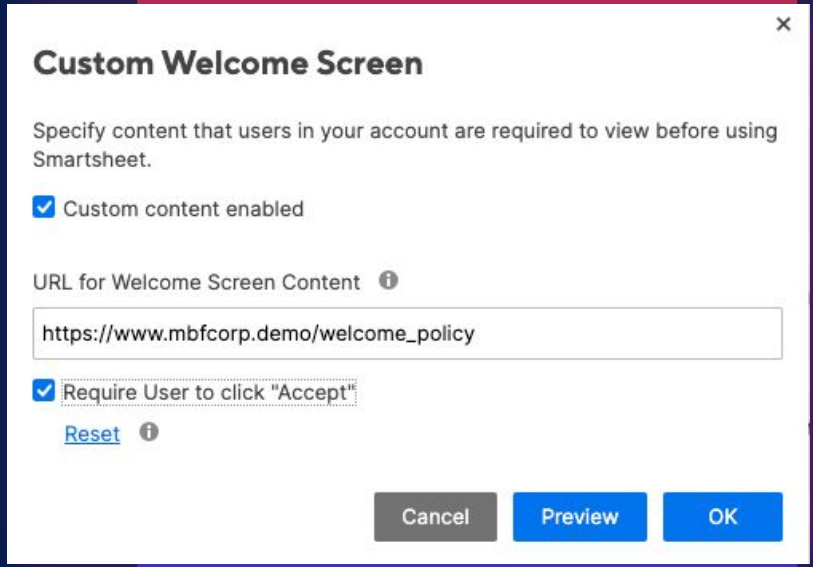
Custom welcome screen

Say hello to my little IT policy

Custom landing page / welcome screen

- New users on first login
- Existing users on next login after enabling

Require acceptance of internal terms and conditions before continuing



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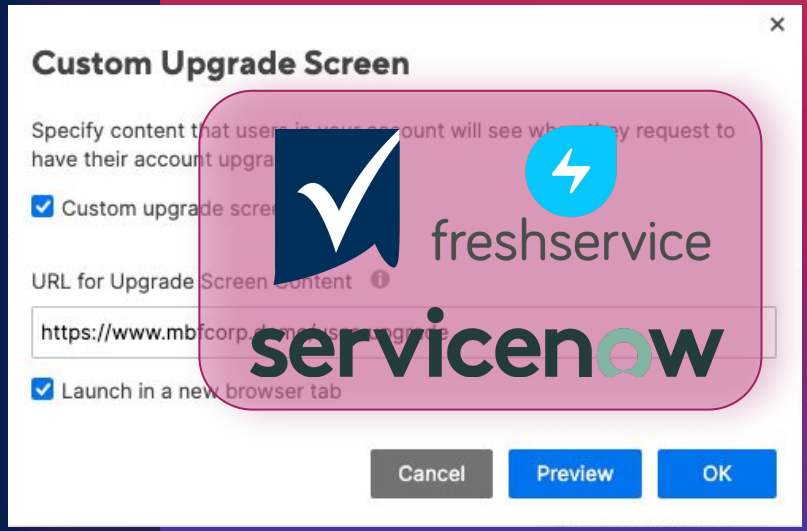
Custom upgrade screen

Level me up Scotty

Customised request screen when unlicensed user attempts to take an action that requires a license

Provide a custom link to:

- Form
- Internal resources
- Internal support

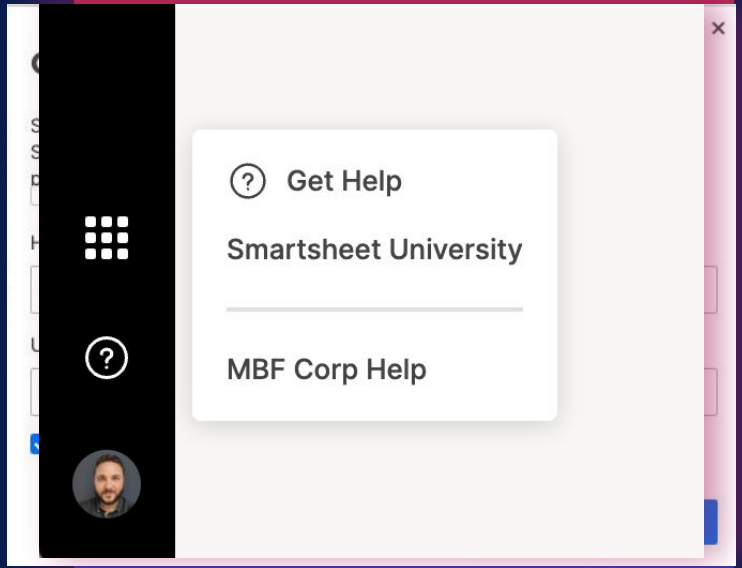


Custom help screen

What's "Google it" mean?

Provide your own custom Help UI option that:

- Instruct users which sheets are relevant
- Inform on how to participate in workflows
- Provide internal contacts for assistance

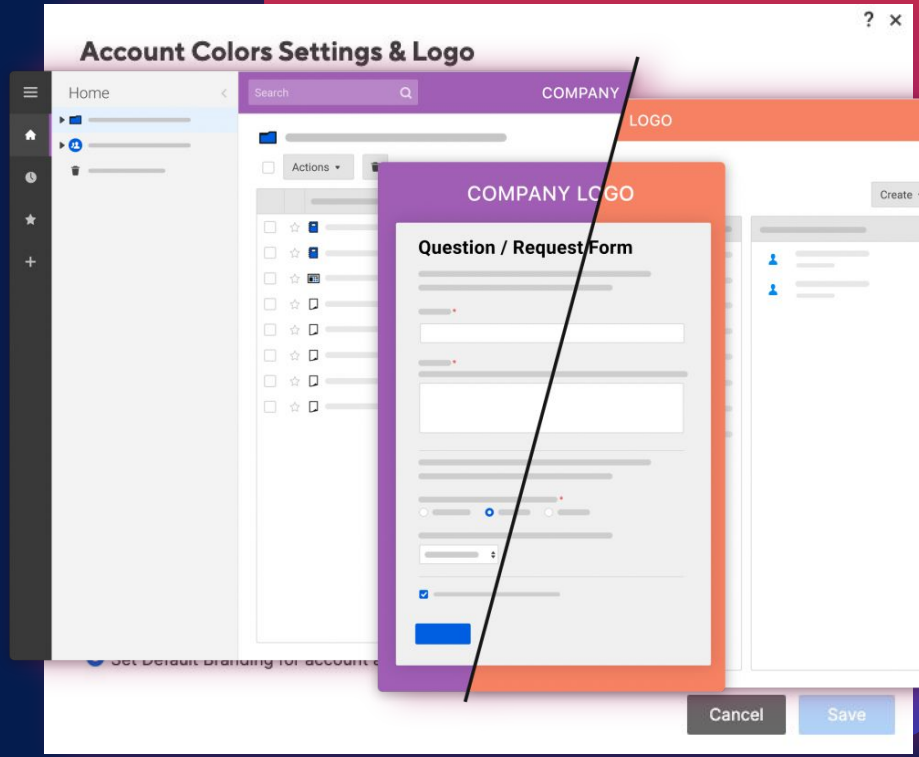


Colors & logos

Smartsheet allows you to add logos and set color themes to give your entire account, or just individual workspaces, a customised look.

The color settings and logo branding that you apply will be displayed in the Smartsheet application, as well as in email messages sent out from Smartsheet.

Color and logo changes also apply to any Sheet, Report, and Dashboard that is not in a Workspace.



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POP QUIZ #3

What does UAP stand for?

a. User access policy

b. User auto provisioning

c. Unidentified aerial phenomenon

POP QUIZ #3

What does UAP stand for?

a. User access policy

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c. Unidentified aerial phenomenon

Session recap

You can now...

1. Manage your users in Smartsheet
2. Utilize the governance policies and reporting capabilities to get the most out of Smartsheet
3. Personalize Smartsheet for your environment

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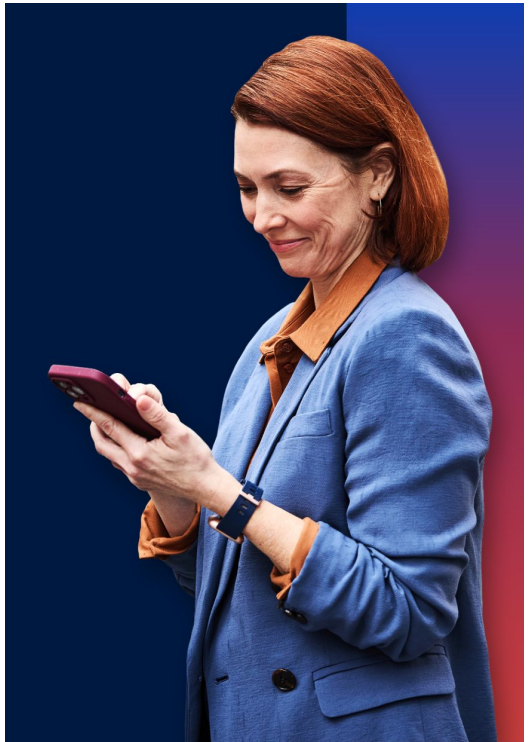
So what now for our three friends?

Alex, Bobbie, and Charlie



Help us help you

Availability varies by plan

Online resources

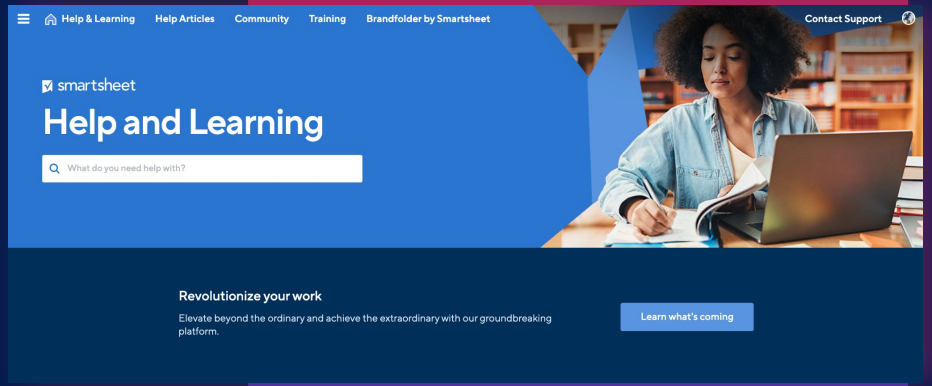
Smartsheet University

Support options

Online resources

Smartsheet Help & Learning Centre

- Knowledge base
- Help Center Articles
- Free tutorials and webinars
- Community forums



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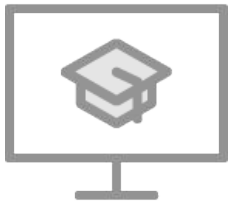

Online resources

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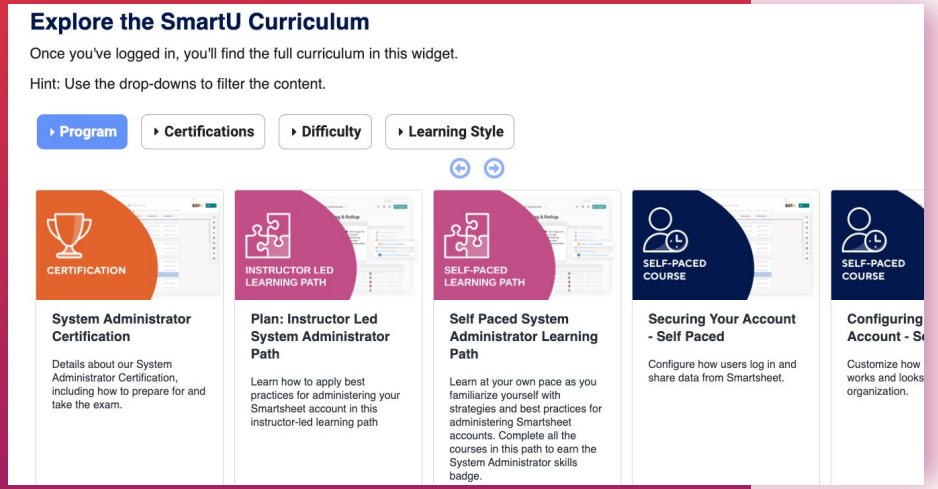
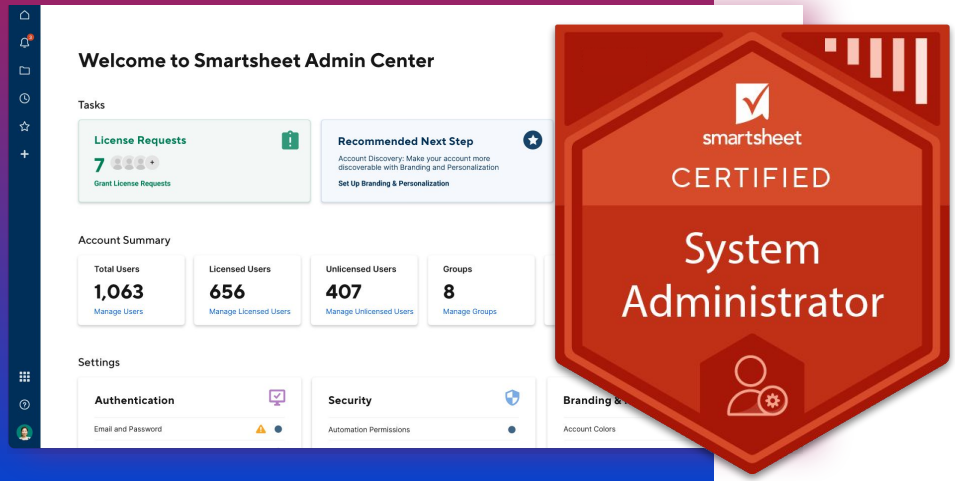
Support options





Test your knowledge

- Take our eLearning path; System Admin
- Get SysAdmin certified!
  - Minimum of 3-6 months of experience as a SysAdmin recommended
- Earn Professional Development Units (PDUs) with the Project Management Institute (PMI)

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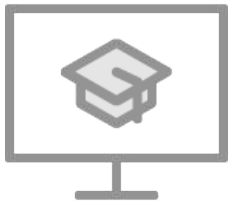
Help us help you

Availability varies by plan



Online resources

Smartsheet University

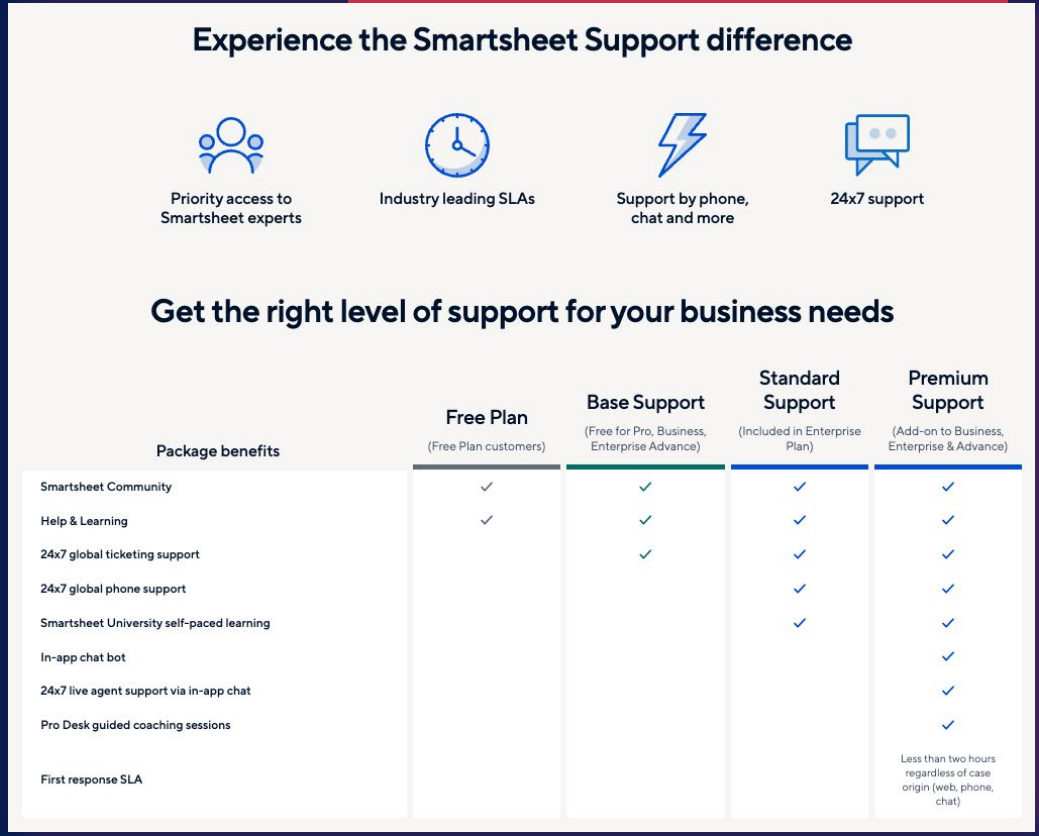
Support options

Smartsheet Support

Talk to an expert

Get coverage that scales with your environment:

- Free Support
- Base Support
- Standard Support Package
- Premium Support Package



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Register for upcoming User Groups

Continue to expand your Smartsheet skills and connections by attending a User Group.

Smartsheet User Groups

- **Discover** how others are using Smartsheet
- **Network** with the Smartsheet team and your peers
- **Virtual** and **in-person** events around the globe

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Smartsheet Administration track

- **Attend:**
  - *SEA4: Rise and thrive with the user subscription model* on Wednesday, October 9 at 1pm
  - *SEA32: Smartsheet Security: Essential controls for safe collaboration* on Thursday, October 10 at 9am
- **Visit the Security and Administration booth:**
  - Provide feedback on future ideas such as the security hub, time based sharing access, and other features

New data security features?
We need your opinion!

QR code goes to survey

Take the survey

We'd love to hear your thoughts on the session.

Open this session in the mobile app, click "Survey," and answer two questions — it's that easy!

Thank you.

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Share your experience at ENGAGE

by participating in the conversation on social media!
Use **#SmartsheetENGAGE** and tag Smartsheet
in your posts all week long.

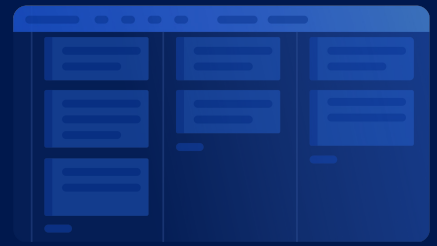
@smartsheet

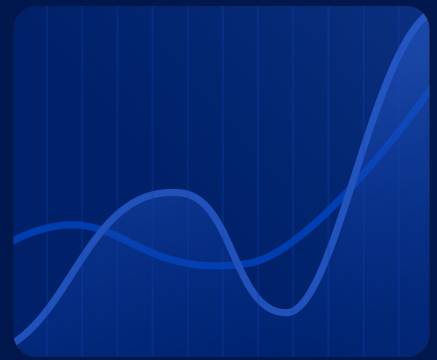
@smartsheetplatform

@smartsheet

@smartsheet

@smartsheet





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