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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





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



# 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



# Manage users

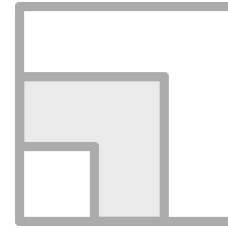
Available on Business and Enterprise plans



**Smartsheet Admin  
Center**



**User and group  
Management**



**Scale**

# 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.

The screenshot displays the Smartsheet Admin Center interface. At the top, it says "Welcome to Smartsheet Admin Center" and "Tasks". Below this are three main task cards: "All License Requests Addressed" (with a green checkmark), "Enterprise Plan Manager" (with a gear icon), and "Governance Controls" (with a shield icon). The "User accounts" section shows "Users" (Licensed: 119, Unlicensed Admins and Editors: 6, Guests: 2, Viewers: 1) and "Admins" (System: 19, Group: 29, Plan asset: 4). It also displays "Licenses remaining: 369" and "Groups: 113". The "Plan Insights" section features a "Plan usage" donut chart showing 254 assets and workspaces (Sheets: 147, Workspaces: 44, Reports: 39, Dashboards: 24) and "Advance capabilities" (Data Shuttle: 0 workflows, Dynamic View: 13 views). The "Settings" section is divided into "Authentication", "Security", and "Branding & Personalization".

## Welcome to Smartsheet Admin Center

Tasks

- All License Requests Addressed** ✓  
All pending license requests have been taken care of. Good work!
- Enterprise Plan Manager** ⚙️  
Ensure all your organization's Smartsheet plans follow your security, governance, and compliance needs. Set policies, policy overrides, and add plans to an Enterprise plan family. [Learn more](#)  
[Go to Enterprise Plan Manager](#)
- Governance Controls** 🛡️  
Set up Governance Controls to manage data in your organization.  
[Set Up Governance Controls](#)

User accounts [Learn more about user types](#)

### Users

Licensed users	119
Unlicensed Admins and Editors	6
Guests	2
Viewers	1

[Download user type report](#)

Last updated Sep 13, 2024, 12:00 AM

### Admins

System admins	19
Group admins	29
Plan asset admins	4

Last updated Sep 13, 2024, 12:00 AM

### Licenses remaining

**369**  
[Buy more](#)

### Groups

**113**  
[Manage](#)

### WorkApps Collaborator Pack

Make sure both internal and external free collaborators can access WorkApps shared from your organization when you buy the WorkApps Collaborator Pack.  
[Learn more](#)  
[Buy now](#)

Plan Insights

### Plan usage

Evaluate how your team uses Smartsheet in their daily processes.  
[Explore insights](#)

Sheets	147
Workspaces	44
Reports	39
Dashboards	24

254 Assets and workspaces

Last updated Sep 13, 2024, 7:00:00 AM UTC

### Advance capabilities

Data Shuttle	0 workflows
Dynamic View	13 views

Last updated Sep 13, 2024, 7:00:00 AM UTC

Settings

### Authentication

[View Only](#)

- Email and Password
- Google
- Microsoft Azure AD
- Apple
- SAML
- System Admin Fallback

### Security

- Automation Permissions
- Form Permissions
- Office Form Submission
- Smartsheet Tenant ID
- Attachment Controls
- Group Membership Controls
- Safe Sharing List
- Web Content Widget
- Publishing Settings
- Insert Images in Sheets
- Secure External Access
- Directory Integration

### Branding & Personalization

- Account Colors
- Account Logo
- Branding Lock
- Welcome Screen
- Custom Email Domain
- Help Screen
- License Request Screen

### Domain & User Auto-Provisioning

[View Only](#)

- Domain Management
- User Auto-Provisioning

### Account & Profile Visibility

- Account Discovery
- Profile Visibility Internal
- Profile Visibility External

### Working Days

- Working Days

# 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.

The screenshot displays the 'Settings' page in the Smartsheet Admin Center, organized into six panels:

- Authentication** (checked icon):
  - Email and Password (warning icon, toggle on)
  - Google (toggle on)
  - Microsoft Azure AD (toggle on)
  - Apple (toggle off)
  - SAML (toggle on)
  - System Admin Fallback (toggle on)
- Security** (shield icon):
  - Automation Permissions (toggle on)
  - Form Permissions (toggle on)
  - Offline Form Submission (toggle on)
  - Smartsheet Tenant ID (toggle on)
  - Attachment Controls (toggle on)
  - Group Membership Controls (toggle on)
  - Safe Sharing List (toggle on)
  - Web Content Widget (toggle off)
  - Publishing Settings (toggle on)
  - Insert Images in Sheets (toggle on)
  - Secure External Access (toggle on)
  - Directory Integration (toggle on)
- Branding & Personalization** (tag icon):
  - Account Colors (toggle on)
  - Account Logo (toggle on)
  - Branding Lock (toggle off)
  - Welcome Screen (toggle off)
  - Custom Email Domain (toggle off)
  - Help Screen (toggle off)
  - License Request Screen (toggle off)
- Domain & User Auto-Provisioning** (grid icon):
  - Domain Management (toggle on)
  - User Auto-Provisioning (toggle on)
- Account & Profile Visibility** (gear icon):
  - Account Discovery (toggle on)
  - Profile Visibility Internal (toggle on)
  - Profile Visibility External (toggle on)
- Working Days** (calendar icon):
  - Working Days (toggle on)

# 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.

Smartsheet Admin Center (EU)

## Welcome to Smartsheet Admin Center

Tasks

- All License Requests Addressed** ✓  
All pending license requests have been taken care of. Good work!
- Recommended Next Step** ⚙️  
Improve account security by disabling authentication options that your organization doesn't normally use.  
[Manage Authentication Options](#)
- Governance Controls** ⚙️  
Set up Governance Controls to manage data in your organization.  
[Set Up Governance Controls](#)

### User Management

[Add User](#) [More Actions](#)

Name & Contact	Member Status	Licensed User	# of Groups	Additional Roles
<b>KD</b> Kieran O'Driscoll kieran.odriscoll@demo.mbfcorp.com	Active	✓	1	9
<b>KA</b> Kimberly Adams kimberly.adams@demo.mbfcorp.com	Active	✓	1	7
<b>KF</b> Kimberly Fussell kimberly.fussell@demo.mbfcorp.com	Active	✓	0	6
<b>KG</b> Kiran Gupta kiran@demo.mbfcorp.com	Active	✓	0	7
<b>KK</b> kristin komassa kristin.komassa@demo.mbfcorp.com	Active	✓	1	7
<b>KJ</b> kyle jeffrey kyle.jeffrey@demo.mbfcorp.com	Active	✓	1	7
<b>LG</b> larry gomez larry.gomez@demo.mbfcorp.com	Active	✓	1	7
<b>LM</b> Laura McDonough laura.mcdonough@demo.mbfcorp.com	Active	✓	1	6
<b>LA</b> Lawrence Archer lawrence.archer@demo.mbfcorp.com	Active	✓	1	6
<b>LG</b> Lea Gikas lea.gikas@demo.mbfcorp.com	Active	✓	1	7
<b>LG</b> Leigh Gibbs leigh@demo.mbfcorp.com	Active	✓	0	7
<b>LB</b> leo balsom leo.balsom@demo.mbfcorp.com	Active	✓	1	7

### Edit User

[General Info](#) [Profile](#) [Groups](#) [Alternate Emails](#)

**First Name**  
Kieran

**Last Name**  
O'Driscoll

**Primary Email Address**  
kieran.odriscoll@demo.mbfcorp.com

**Roles**

- Licensed User
- Group Admin
- Resource Viewer
- Plan Asset Admin
- System Admin

**Premium Applications**

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

Web Content Widget

Publishing Settings

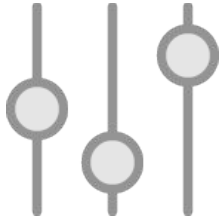
Insert Images in Sheets

Secure External Access



# Manage users

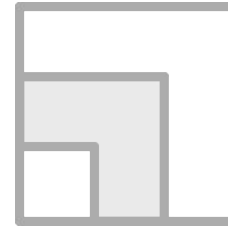
Available on Business and Enterprise plans



**Smartsheet Admin  
Center**



**User and group  
Management**



**Scale**

# 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

Smartsheet Admin Center (EU)

### User Management

[Add User](#) [More Actions](#)

Name & Contact ↓	Member Status	Licensed User	# of Groups	Additional Roles
<b>KO</b> Kieran O'Driscoll kieran.odriscoll@demo.mbfcorp.com	Active	✓	1	9
<b>KA</b> Kimberly Adams kimberly.sadams@demo.mbfcorp.com	Active	✓	1	7
<b>KF</b> Kimberly Fussell kimberly.fussell@demo.mbfcorp.com	Active	✓	0	6
<b>KG</b> Kiran Gupta kiran@demo.mbfcorp.com	Active	✓	0	7
<b>KK</b> kristin komassa kristin.komassa@demo.mbfcorp.com	Active	✓	1	7
<b>KJ</b> kyle jeffrey kyle.jeffrey@demo.mbfcorp.com	Active	✓	1	7
<b>LG</b> larry gomez larry.gomez@demo.mbfcorp.com	Active	✓	1	7
<b>LM</b> Laura McDonough laura.mcdonough@demo.mbfcorp.com	Active	✓	1	6
<b>LA</b> Lawrence Archer lawrence.archer@demo.mbfcorp.com	Active	✓	1	6
<b>LG</b> Lea Gikas lea.gikas@demo.mbfcorp.com	Active	✓	1	7
<b>LG</b> Leigh Gibàs leig@demo.mbfcorp.com	Active	✓	0	7
<b>LB</b> Ieo balsom leo.balsom@demo.mbfcorp.com	Active	✓	1	7

#### Edit User

General Info Profile Groups Alternate Emails

**First Name**  
Kieran

**Last Name**  
O'Driscoll

**Primary Email Address**  
kieran.odriscoll@demo.mbfcorp.com

**Roles**

- Licensed User
- Group Admin
- Resource Viewer
- Plan Asset Admin
- System Admin

**Premium Applications**

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

# 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.

The screenshot shows the Smartsheet Admin Center interface. The main page is titled "Group Management" and features a list of groups on the left side. The groups listed are: LABCBS - Facilities, Marketing, Test Group, Eda's Group, HR, Legal Group, General, Research Group, Board, Consultant, and Risk Analyzer. A "Share sheet" dialog box is open in the foreground, showing a search for "group" and a list of groups to share with. The groups listed in the dialog are: Test Group (4 members), SCC Sample Group (2 members), TSE Demo Group 1 (14 members), TSE Demo Group 2 (13 members), and TSE Demo Group 3. The dialog also includes a "Notify people" checkbox (checked) and a "Cc myself" checkbox (unchecked). At the bottom of the dialog, there are buttons for "Copy link", "Share to workspace", and "Share".

Smartsheet Admin Center

## Group Management

Create Group Search list...

Group Name ↓

- LABCBS - Facilities
- Marketing
- Test Group
- Eda's Group
- HR
- Legal Group
- General
- Research Group
- Board
- Consultant
- Risk Analyzer

### Share sheet

Invite people and groups

group

Editor - can share

- Test Group  
Group - 4 members
- SCC Sample Group  
Group - 2 members
- TSE Demo Group 1  
Group - 14 members
- TSE Demo Group 2  
Group - 13 members
- TSE Demo Group 3

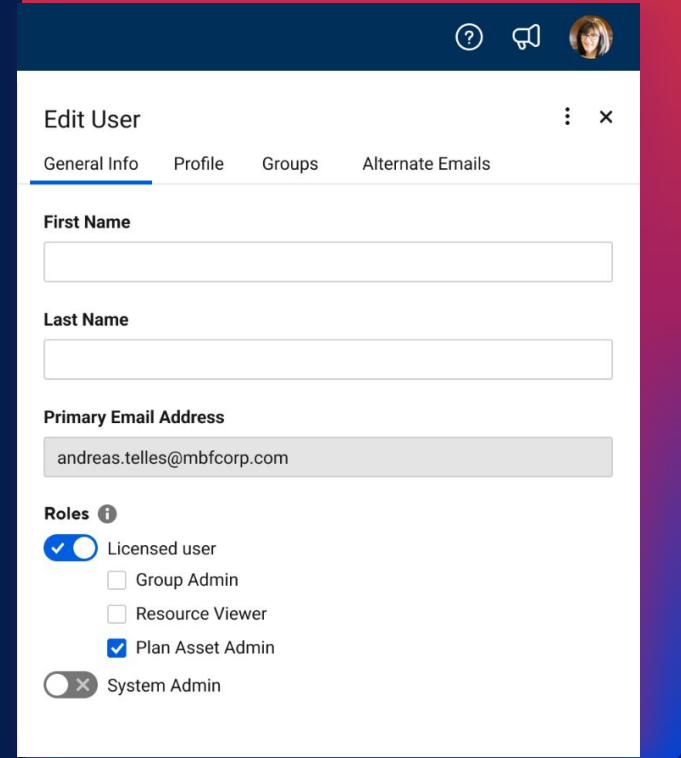
Notify people  Cc myself


Collaborators ▶

Copy link Share to workspace Share

# Plan Asset Admins

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



**Edit User** ? 🗨 

**General Info** Profile Groups Alternate Emails

**First Name**

**Last Name**

**Primary Email Address**  
andreas.telles@mbfcorp.com

**Roles** ⓘ

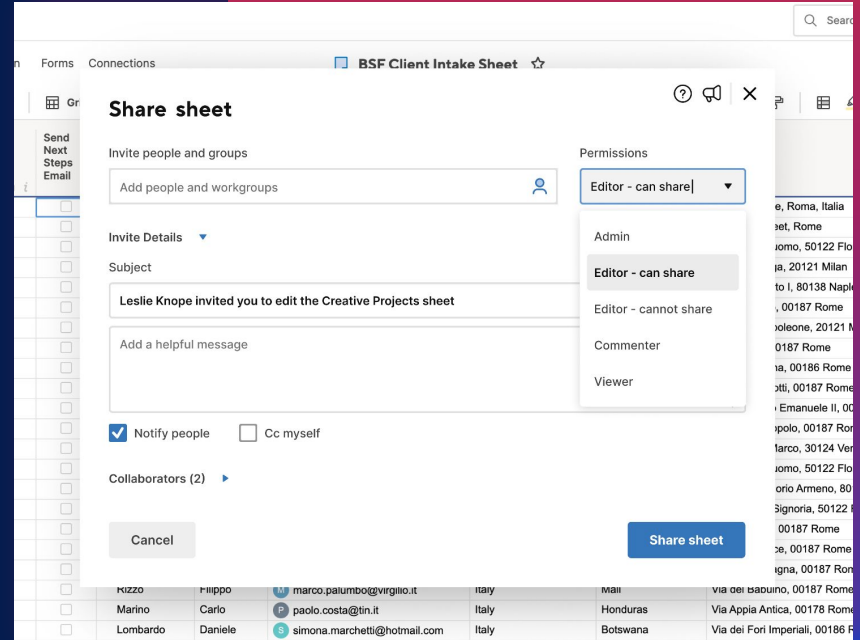
- Licensed user
  - Group Admin
  - Resource Viewer
  - Plan Asset Admin
- System Admin

# 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

# 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

**Smartsheet Admin Center**

### User Management

[Add User](#) [Bulk Actions](#)

Name & Contact ↓	Member Status
<b>Andreas Telles</b> andreas.telles@mbfcorp.com	Active
<b>Samantha Muschett</b> smuschett@mbfcorp.com	Active
<b>Amita Millner</b> amita.millner@mbfcorp.com	Active
<b>Brooke Hinson</b> brooke.hinson@mbfcorp.com	Pending
<b>Dona Milot</b> dona.milot@mbfcorp.com	Active
<b>Eda Obyrne</b> eda.obyrne@mbfcorp.com	Active
<b>Elizbeth Stecklein</b> elizbeth.stecklein@mbfcorp.com	Declined
<b>Emmett Bourne</b> emmett.bourne@mbfcorp.com	Active
<b>Felicia Bierman</b> felicia.bierman@mbfcorp.com	Active
<b>Gregory Haris</b> gregory.haris@mbfcorp.com	Active
<b>Jamey Ell</b> jamey.ell@mbfcorp.com	Active

#### Edit User

General Info | Profile | Groups | Alternate Emails

**Roles**

- Licensed User
  - Group Admin
  - Resource Viewer
- System Admin

**Premium Applications**

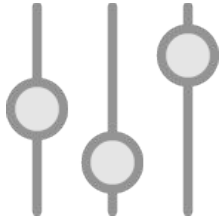
- Dynamic View
- DataMesh
- Calendar
- Data Shuttle
- Pivot
- Data Tables

**Connectors**

- Jira Admin
- Jira User
- Salesforce Admin
- Salesforce User

# Manager users

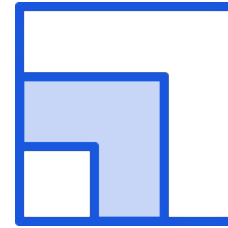
Available on Business and Enterprise plans



**Smartsheet Admin  
Center**



**User and group  
management**



**Scale**



# Bulk Update Permissions

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

### Bulk Update Basic Permissions

Update Smartsheet roles to users in bulk. [Learn more.](#)

**Step 1: Download User List**

Click **Send User List** to receive an email from Smartsheet with a link to download a CSV file containing a list of users in your account.

[Send User List](#)

**Step 2: Update User Roles**

- Open the CSV file in a spreadsheet application.
- Enter "TRUE" into the cell for each user role that you want to assign and enter "FALSE" for all other cells.
- After you've filled in the spreadsheet, save it as a CSV file.

**Step 3. Upload the CSV file**

Attach the updated CSV file and click **Import**.

Drag and drop a file here or [browse](#)

[Cancel](#) [Import](#)

Email	Sys Admin	Group Admin	Licensed User	Resource Viewer
<a href="#">bob@acme.com</a>	TRUE	TRUE	TRUE	TRUE
<a href="#">fred@acme.com</a>	FALSE	FALSE	TRUE	TRUE
<a href="#">james@acme.com</a>	FALSE	FALSE	TRUE	TRUE
<a href="#">mary@acme.com</a>	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*

```
Copy Expand all Collapse all

{
  "id": 48569348493401200,
  "admin": true,
  "customWelcomeScreenViewed": "2020-08-25T12:15:47Z",
  "email": "jane.doe@smartsheet.com",
  "firstName": "Jane",
  "groupAdmin": true,
  "lastLogin": "2020-10-04T18:32:47Z",
  "lastName": "Doe",
  "licensedSheetCreator": true,
  "name": "Jane Doe",
  - "profileImage": {
    "imageId": "u1!nAtdn5RJb_o!k6_e_3h2R3w!wmYXPek-yVD",
    "height": 1050,
    "width": 1050
  },
  "resourceViewer": true,
  "sheetCount": 42,
  "status": "ACTIVE"
}
```

# 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



okta



# 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.

 smartsheet

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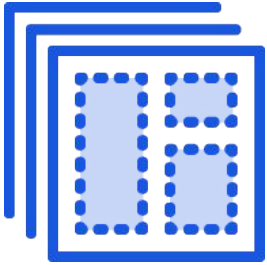
# Meet Charlie

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

# Utilize reports

Available above Enterprise plans



**Admin reports**



**Plan Insights**



**Event Reporting**



## Welcome to Smartsheet Admin Center

Tasks

### All License Requests Addressed

All pending license requests have been taken care of. Good work!

### Recommended Steps Completed

You are all caught up!

User accounts [Learn more about user types](#)

#### Users

Licensed users	1
Unlicensed Admins and Editors	-
Guests	-
Viewers	-

[Download user type report](#)

Last updated Aug 5, 2024, 3:00 PM

#### Admins

System admins	2
Group admins	2
Plan asset admins	0

Last updated Aug 5, 2024, 3:00 PM

Licenses remaining

1

[Buy more](#)

Groups

0

[Manage](#)

# 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
<a href="#">bob@mbfcorp.com</a>	External	Licensed User	Yes	Yes		0	[[ Blank ]]	0	0	0		
<a href="#">sal@mbfcorp.com</a>	Internal	Unlicensed Admin and Editor				2	Commenter	0	2	0		
<a href="#">jason@mbfcorp.com</a>	Internal	Licensed User	Yes	Yes		21	Owner	0	0	21	2024-07-29	

Smartsheet Admin Center

## User Management

[Add User](#)
[More Actions](#)
Show All Users

Name & Contact	Member Status	Licensed User	# of Groups	Additional Roles	Last Login
<b>Andre</b> andreas	Active	✓	1	4	Nov 11, 2023, 3:30 PM
<b>Annell</b> annelle	Active	✓	1	0	Nov 10, 2023, 5:30 PM
<b>Armita</b> armita.m	Active	✓	2	2	Nov 11, 2023, 10:29 AM
<b>Brooke</b> brooke.l	Pending	✓	2	4	Nov 11, 2023, 9:10 AM
<b>Dona</b> dona.milot@mblcorp.com	Active	✓	4	3	Nov 11, 2023, 9:10 AM

Name	Email	Status	Sys Admin	Group Admin	Licensed User	Resource Viewer	JIRA Connector Admin
Admin Demo	admindemo@	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Josh Levy	joshlevy25@	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CIS One	connectortrai	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Connector Admin (don't touch!)	connectortrai	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SE One	connectortrai	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Admin Three	connectortrai	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Admin Nine	connectortrai	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SE Two	connectortrai	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Admin Ten	connectortrai	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
First Last	connectortrai	Invited	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Connector Demoadmin	connectortrai	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Admin Four	connectortrai	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Admin Five	connectortrai	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin Six	connectortrai	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin Seven	connectortrai	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Test Eight	connectortrai	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CIS Two	connectortrai	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

# 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

SmartSheet Admin Center

### User Management

[Add User](#)
[More Actions](#)
Show All Users

Name & Contact	Member Status	Licensed User	# of Groups	Additional Roles	Last Login
<b>Andres</b> andreas	Active	✓	1	4	Nov 11, 2023, 3:30 PM
<b>Annellie</b> annelle	Active	✓	1	0	Nov 10, 2023, 5:30 PM
<b>Armita</b> armita.r	Active		2	2	Nov 11, 2023, 10:29 AM

Key	Name	Workspace Name	Type	Owner	Shared To
P_HSjSAaySfr3Olzh	2 in 1 Event Work Back and RACI		Sheet	admindemo@demo.mt	admindemo@demo.mt
P_HSjSAaySfr3Olzh	2 in 1 Event Work Back and RACI		Sheet	admindemo@demo.mt	admindemo@demo.mt
P_HSjSAaySfr3Olzh	2 in 1 Event Work Back and RACI		Sheet	admindemo@demo.mt	admindemo@demo.mt
DKq426SSZkywoKt	2019 Maintenance Request Tracker	___ Assets - Core App	Sheet	admindemo@demo.mt	admindemo@demo.mt
Nw4rg1z3gIkMb_vj	2019 Maintenance Request Tracker	Workspace Ownership	Sheet	admindemo@demo.mt	admindemo@demo.mt
Nw4rg1z3gIkMb_vj	2019 Maintenance Request Tracker	Workspace Ownership	Sheet	admindemo@demo.mt	admindemo@demo.mt
SH5YOVG0bsxZ9U	2019 Maintenance Request Tracker	___ Assets - Core App	Sheet	admindemo@demo.mt	admindemo@demo.mt
ZjwJxAo-GBy6K0vq	2019 Maintenance Request Tracker		Sheet	admindemo@demo.mt	admindemo@demo.mt
0CZNIChZAwqk6pfil	2020 Maintenance Request Tracker	Workspace Ownership	Sheet	admindemo@demo.mt	admindemo@demo.mt
0CZNIChZAwqk6pfil	2020 Maintenance Request Tracker	Workspace Ownership	Sheet	admindemo@demo.mt	admindemo@demo.mt
4vOINT3Auf8xB3yt	2020 Maintenance Request Tracker	___ Assets - Core App	Sheet	admindemo@demo.mt	admindemo@demo.mt
Y7cFHuYWIERY7y9T	2020 Maintenance Request Tracker	___ Assets - Core App	Sheet	admindemo@demo.mt	admindemo@demo.mt
oq1_XJbagTlYG_y	2020 Maintenance Request Tracker		Sheet	admindemo@demo.mt	admindemo@demo.mt
l8-9ng6dpka1eTTr0	2021 Maintenance Request Tracker		Sheet	admindemo@demo.mt	admindemo@demo.mt
aQqMa_dZeoXCiYn	2021 Maintenance Request Tracker	___ Assets - Core App	Sheet	admindemo@demo.mt	admindemo@demo.mt
kJ54qBRZHMpL1JC	2021 Maintenance Request Tracker	___ Assets - Core App	Sheet	admindemo@demo.mt	admindemo@demo.mt
lkeJNSqLABtasDbH	2021 Maintenance Request Tracker	Workspace Ownership	Sheet	admindemo@demo.mt	admindemo@demo.mt
lkeJNSqLABtasDbH	2021 Maintenance Request Tracker	Workspace Ownership	Sheet	admindemo@demo.mt	admindemo@demo.mt
FCOFTd1LUATykGN	2022 Maintenance Request Tracker	___ Assets - Core App	Sheet	admindemo@demo.mt	admindemo@demo.mt
WOWZG4Pab9hjBg	2022 Maintenance Request Tracker	Workspace Ownership	Sheet	admindemo@demo.mt	dane.brennan2@gmail
WOWZG4Pab9hjBg	2022 Maintenance Request Tracker	Workspace Ownership	Sheet	admindemo@demo.mt	admindemo@demo.mt
oil_r8_Dwn9yCefL	2022 Maintenance Request Tracker	___ Assets - Core App	Sheet	admindemo@demo.mt	admindemo@demo.mt

# 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

# 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

**View Activity Log: Quarterly Commitment Tracker**

Filters (applied)

Action: 0 selected | Collaborators: | Date Range: 09/24/24 to 10/01/24

Clear Filters | Apply

Today		
Action	User	Time
Row Hierarchy Changes (14)	Smartsheet Automation	12:57:23 PM
▶ Cells Changed (1)	Jonathon Wong	11:34:27 AM
▶ Cells Changed (1)	Victoria Pearson	11:33:57 AM
▶ Cells Changed (1)	Jamal King	11:33:17 AM
Card View: Cards Reordered Indirectly		
Row Hierarchy Changes (14)	Victoria Pearson	11:33:17 AM
Row Hierarchy Changes (17)	Intan Bologna	11:32:31 AM
▶ Cells Changed (1)	June Taylor	11:24:00 AM
▶ Cells Changed (1)	Smartsheet Automation	11:23:59 AM
▶ Cells Changed (1)	Smartsheet Automation	11:23:51 AM
▶ Cells Changed (1)	Victoria Pearson	11:23:36 AM
▶ Cells Changed (1)	Jonathon Wong	11:23:33 AM
Card View: Cards Reordered Indirectly		
▶ Cells Changed (1)	Sheldon Greene	11:23:19 AM
Conditional Formatting Changed (1)		
▶ Cells Changed (1)	Smartsheet Automation	11:23:06 AM
▶ Cells Changed (1)	Smartsheet Automation	11:23:06 AM
▶ Cells Changed (1)	Smartsheet Automation	11:23:04 AM

Close

Smartsheet Admin Center

## User Management

[Add User](#)
[More Actions](#)
Show All Users

Name & Contact	Member Status	Licensed User	# of Groups	Additional Roles	Last Login
<b>Andre</b> andreas	Active	✓	1	4	Nov 11, 2023, 3:30 PM
<b>Annell</b> annelle	Active	✓	1	0	Nov 10, 2023, 5:30 PM
<b>Armita</b> armita.m	Active		2	2	Nov 11, 2023, 10:29 AM
<b>Brooke</b> brooke.l	Pending	✓	2	4	Nov 11, 2023, 9:10 AM
<b>Dona</b> dona.milot@mbfcorp.com	Active	✓	4	3	Nov 11, 2023, 9:10 AM
<b>Eda Obyrne</b> eda.obyrne@mbfcorp.com	Active	✓	0	2	Nov 10, 2023, 5:30 PM

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

Smartsheet Admin Center

## User Management

[Add User](#)
[More Actions](#)
Show All Users

Name & Contact	Member Status	Licensed User	# of Groups	Additional Roles	Last Login
<b>Andres</b> andreas	Active	✓	1	4	Nov 11, 2023, 3:30 PM
<b>Annelle</b> annelle	Active	✓	1	0	Nov 10, 2023, 5:30 PM
<b>Armita</b> armita.r	Active	✓	2	2	Nov 11, 2023, 10:29 AM
<b>Brooke</b> brooke.l	Pending	✓	2	4	Nov 11, 2023, 9:10 AM
<b>Dona</b> dona.milot@mbfcorp.com	Active	✓	4	3	Nov 11, 2023, 9:10 AM

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

# Utilize reports

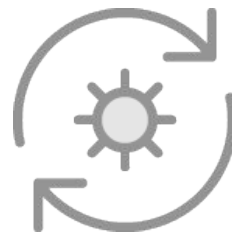
Available above Enterprise plans



**Admin reports**



**Plan Insights**

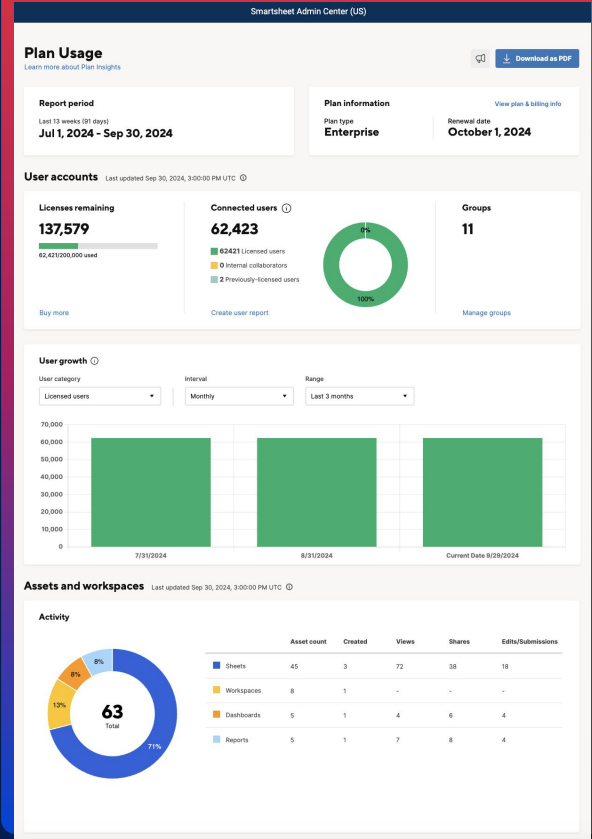


**Event Reporting**

# 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:

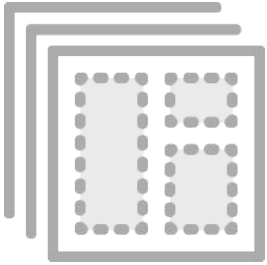
- Plan information
- Licenses and Connected User counts
- Groups
- User growth
- Item creation
- Advance capability evaluations





# Utilize reports

Available above Enterprise plans



**Admin reports**



**Plan Insights**



**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"
  }
}
```



# 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

## 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.

smartsheet

ENGAGE

# 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



# Manage advanced settings and branding

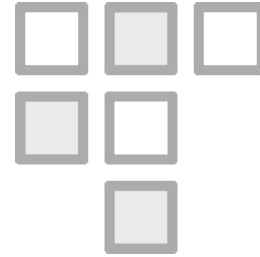
Available on Enterprise and Advance plans



**User  
auto-provisioning**



**Enterprise access  
controls**



**Customization**



# User Auto-Provisioning

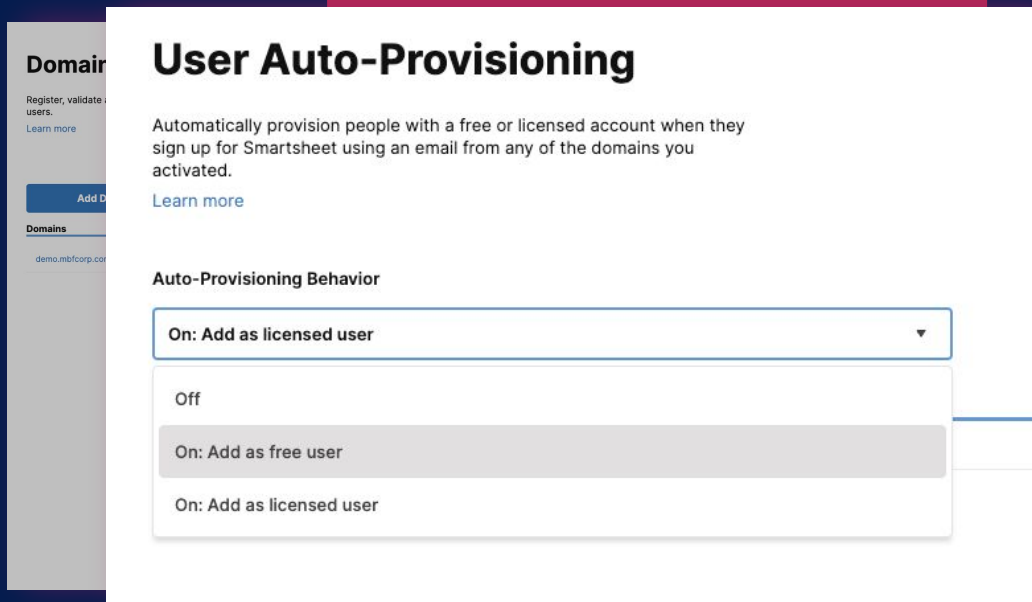
## Automate user management

Enable new users from your company to automatically be provisioned

- Licensed or Unlicensed User

Prevent plan proliferation

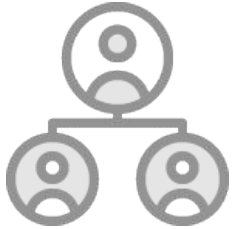
Requires domain validation



The screenshot shows the 'User Auto-Provisioning' settings page. At the top, the title 'User Auto-Provisioning' is displayed. Below it, a description states: 'Automatically provision people with a free or licensed account when they sign up for Smartsheet using an email from any of the domains you activated.' A 'Learn more' link is provided. The 'Auto-Provisioning Behavior' section features a dropdown menu currently set to 'On: Add as licensed user'. Below the dropdown, there are three options: 'Off', 'On: Add as free user', and 'On: Add as licensed user'. The 'On: Add as free user' option is highlighted with a grey background. On the left side of the screenshot, a partial view of the 'Domains' table is visible, showing a table with a header 'Domains' and a row containing the domain 'demo.mbfcorp.co'.

# Manage advanced settings and branding

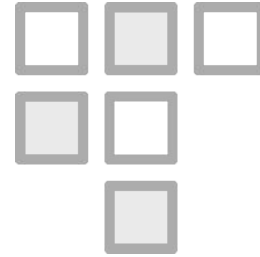
Available on Enterprise and Advance plans



**User  
auto-provisioning**



**Enterprise access  
controls**



**Customization**

# 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

### Security & Controls

#### Permissions

##### Notifications and Requests

Control who can receive notifications and requests from people in your organization. [Learn more](#)

Only shared users

Only shared users & people in your account

Anyone

- Slack
- Microsoft Teams

##### Groups

Restrict who can be added to groups by Group Admins and System Admins. [Learn more](#)

People in your account & external contacts

Only people in your account

##### Form Permissions

Control who has access to Forms. [Learn More](#)

Anyone with the form link

Only people with a Smartsheet login

Only people in your account via the Safe Sharing List

##### Account Discovery

Allow people who share an email domain with you to discover and request to join your account. [Learn more](#)

##### Offline Form Submission

Allow people to open the mobile app, view forms and submit responses without an internet connection. [Learn more](#)

# 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

The screenshot displays the Smartsheet Admin Settings interface. At the top, there are two overlapping panels: 'Safe Sharing Policy' and 'Sheet Sharing'. The 'Sheet Sharing' panel includes options for 'Invite Collaborators' and 'Permissions'. Below these is the 'Admin Settings' section, which features an 'Actions' dropdown and a trash icon. A table lists the sharing settings for 'Safe Sharing-Exe...' items.

	Name	Sharing	Owner	Last Update
<input type="checkbox"/>	Safe Sharing-Exe...	Workspace	MBF Admin (mbfadmin@d	03/21/24
<input type="checkbox"/>	Safe Sharing-Exe...	Workspace	MBF Admin (mbfadmin@d	03/21/24

At the bottom of the interface, there are 'Cancel' and 'Share Sheet' buttons.

# Publishing restrictions

## Gatekeeping at its best

Configure what can be published:

- Reports
- Sheets
- Dashboards
- Calendars

**Report Publishing**

Allow people to publish reports. [Learn more](#)

- Published reports are available to anyone with the link
- Published reports are available to users in the owner's account

**Dashboard Publishing**

Allow people to publish dashboards. [Learn more](#)

- Published dashboards are available to anyone with the link
- Published dashboards are available to users in the owner's account

**Sheet Publishing**

Allow people to publish Sheets. [Learn more](#)

- Published sheets are available to anyone with the link
- Published sheets are available to users in the owner's account

**Calendar Publishing**

Allow people to publish calendars. [Learn more](#)

# Attachments restrictions









## Only attach from trusted sources

Choose allowed data sources for attachments:

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

### Attachments

Decide what sources people are allowed to use when attaching links and files to rows, sheets, proofs, and workspaces. [Learn more](#)

-  Upload From Computer
-  Google Drive
-  OneDrive
-  Box
-  Dropbox
-  Evernote
-  Egnyte
-  Link (URL)

---

### Images in Sheet Fields

Allow people to insert images directly in sheet cells and other fields. [Learn more](#)

# 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

Smartsheet Admin Center (US) MBFCorp IT

### Plan Management

Manage Smartsheet plans for your organization. [Learn more](#)

Managed plans [Discover plans](#)

Find plans in your organization

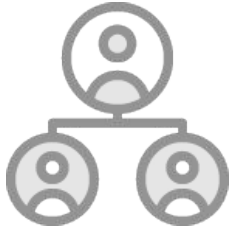
Validated domains: mbfc corp mbfc corp.com

Plan Name	Plan type	Start date	Next Renewal	Main Contact
Apple	Enterprise	Feb 14, 2021	Feb 14, 2024	MBFCorp IT MbcCorpIT@mbfc corp
Banana	Business	Feb 14, 2021	Feb 14, 2024	Blake Bennett blake.bennett@mbfc corp
Cherry	Enterprise	Feb 14, 2021	Feb 14, 2024	Hilda Wilson hilda.wilson@mbfc corp
Date	Business	Feb 14, 2021	Feb 14, 2024	(Firstname Lastname) firstname.lastname@mbfc corp
Eggplant	Business	Feb 14, 2021	Feb 14, 2024	(Firstname Lastname) firstname.lastname@mbfc corp
Fig	Enterprise	Feb 14, 2021	Feb 14, 2024	(Firstname Lastname) firstname.lastname@mbfc corp
Guava	Enterprise	Feb 14, 2021	Feb 14, 2024	(Firstname Lastname) firstname.lastname@mbfc corp
Honeydew	Business	Feb 14, 2021	Feb 14, 2024	(Firstname Lastname) firstname.lastname@mbfc corp
Jackfruit	Business	Feb 14, 2021	Feb 14, 2024	(Firstname Lastname) firstname.lastname@mbfc corp
Melon	Enterprise	Feb 14, 2021	Feb 14, 2024	(Firstname Lastname) firstname.lastname@mbfc corp

1-10 of 21

# Manage advanced settings and branding

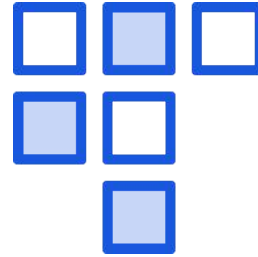
Available on Enterprise and Advance plans



**User  
auto-provisioning**



**Enterprise access  
controls**



**Customization**



# 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

### Custom Welcome Screen ✕

Specify content that users in your account are required to view before using Smartsheet.

Custom content enabled

URL for Welcome Screen Content ?

Require User to click "Accept" ?

[Reset](#) ?

# 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 Upgrade Screen**

Specify content that users in your account will see when they request to have their account upgraded.

Custom upgrade screen

URL for Upgrade Screen content ⓘ

Launch in a new browser tab

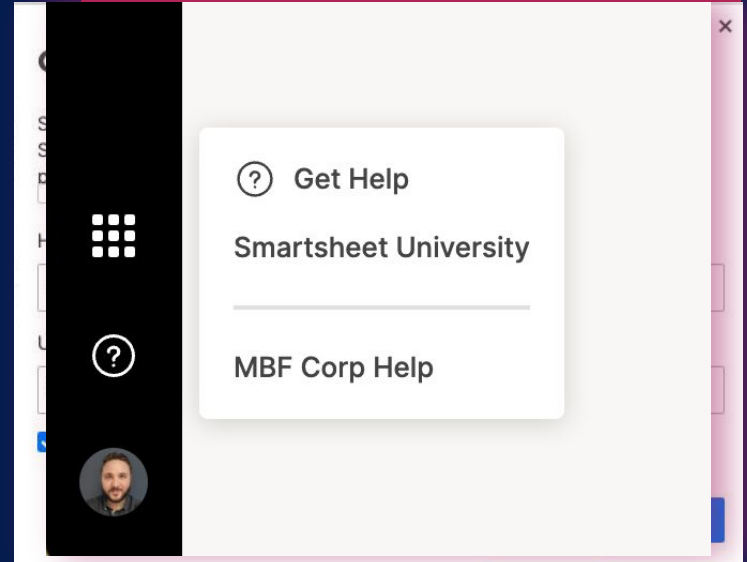
Cancel Preview OK

# 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

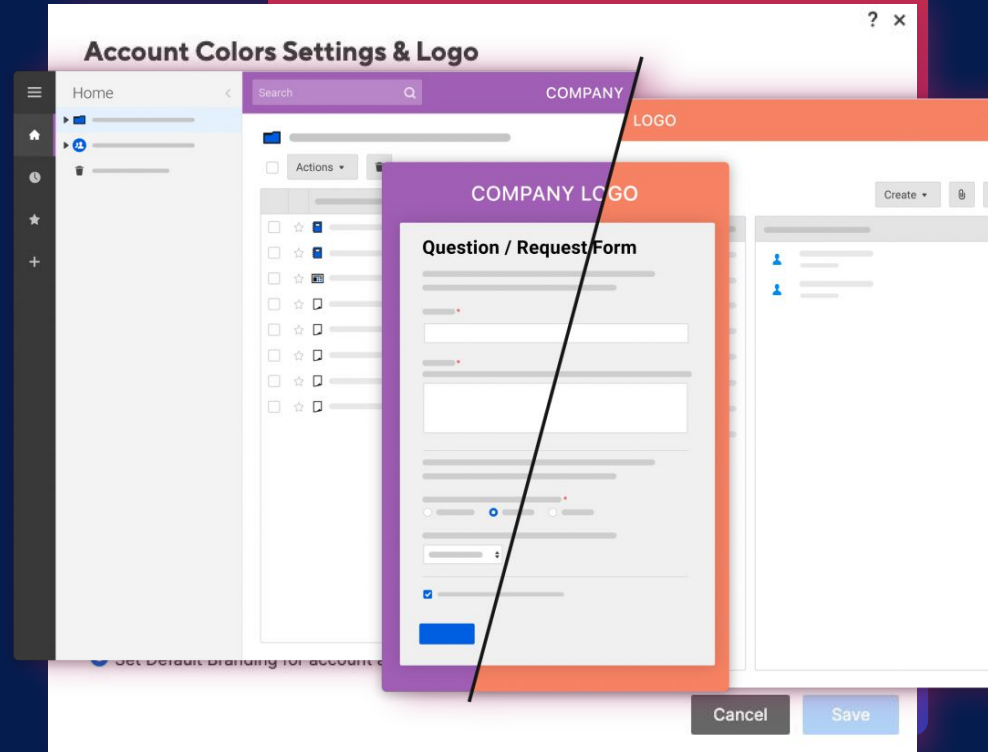


# Colors & logos

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.



## 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



**b. User auto  
provisioning**



c. Unidentified  
aerial phenomenon

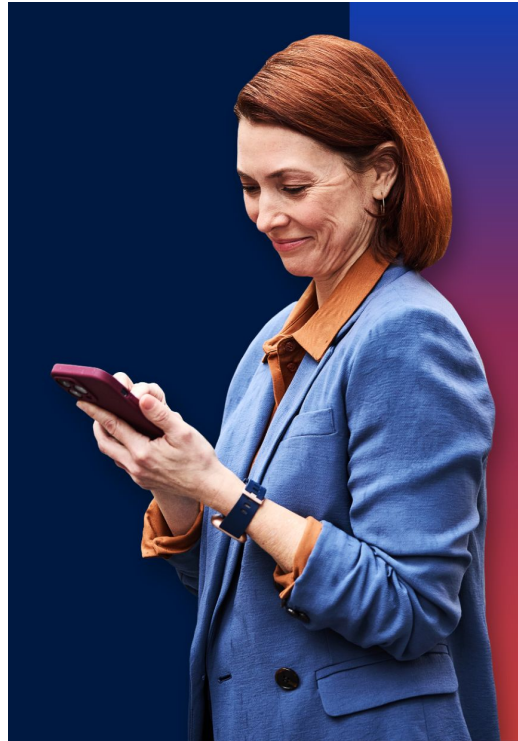
# Session recap

## 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

# So what now for our three friends?

Alex, Bobbie, and Charlie





# Help us help you

Availability varies by plan



**Online  
resources**



**Smartsheet  
University**

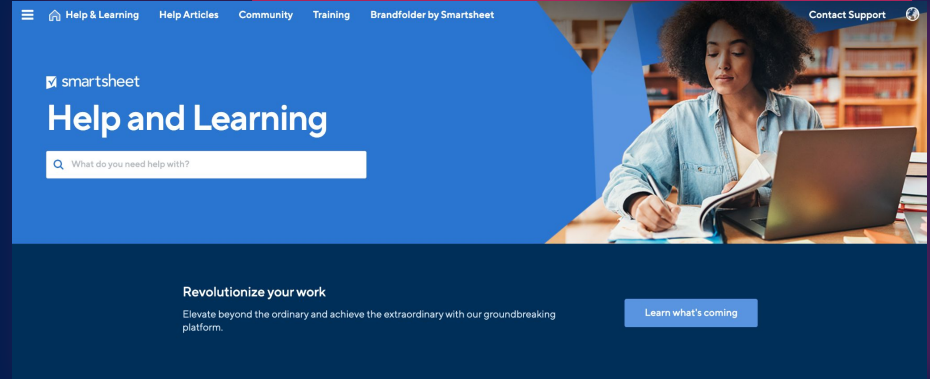


**Support  
options**

# Online resources

## Smartsheet Help & Learning Centre

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



# Help us help you

Availability varies by plan



**Online  
resources**



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## Explore the SmartU Curriculum

Once you've logged in, you'll find the full curriculum in this widget.

Hint: Use the drop-downs to filter the content.

Program Certifications Difficulty Learning Style

**CERTIFICATION**  
**System Administrator Certification**  
Details about our System Administrator Certification, including how to prepare for and take the exam.

**INSTRUCTOR LED LEARNING PATH**  
**Plan: Instructor Led System Administrator Path**  
Learn how to apply best practices for administering your Smartsheet account in this instructor-led learning path

**SELF-PACED LEARNING PATH**  
**Self Paced System Administrator Learning Path**  
Learn at your own pace as you familiarize yourself with strategies and best practices for administering Smartsheet accounts. Complete all the courses in this path to earn the System Administrator skills badge.

**SELF-PACED COURSE**  
**Securing Your Account - Self Paced**  
Configure how users log in and share data from Smartsheet.

**SELF-PACED COURSE**  
**Configuring Account - Self Paced**  
Customize how work and looks organization.

## 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)

**Welcome to Smartsheet Admin Center**

Tasks

- License Requests** 7  
Grant License Requests
- Recommended Next Step**  
Account Discovery: Make your account more discoverable with Branding and Personalization  
Set Up Branding & Personalization

Account Summary

Total Users	Licensed Users	Unlicensed Users	Groups
<b>1,063</b> Manage Users	<b>656</b> Manage Licensed Users	<b>407</b> Manage Unlicensed Users	<b>8</b> Manage Groups

Settings

- Authentication**  
Email and Password
- Security**  
Automation Permissions
- Branding & Personalization**  
Account Colors



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# Smartsheet Support

## Talk to an expert

Get coverage that scales with your environment:

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

## Experience the Smartsheet Support difference



Priority access to Smartsheet experts



Industry leading SLAs



Support by phone, chat and more



24x7 support

## Get the right level of support for your business needs

Package benefits	Free Plan (Free Plan customers)	Base Support (Free for Pro, Business, Enterprise Advance)	Standard Support (Included in Enterprise Plan)	Premium Support (Add-on to Business, Enterprise & Advance)
Smartsheet Community	✓	✓	✓	✓
Help & Learning	✓	✓	✓	✓
24x7 global ticketing support		✓	✓	✓
24x7 global phone support			✓	✓
Smartsheet University self-paced learning			✓	✓
In-app chat bot				✓
24x7 live agent support via in-app chat				✓
Pro Desk guided coaching sessions				✓
First response SLA				Less than two hours regardless of case origin (web, phone, chat)

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

# 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.

 smartsheet

# ENGAGE



# 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



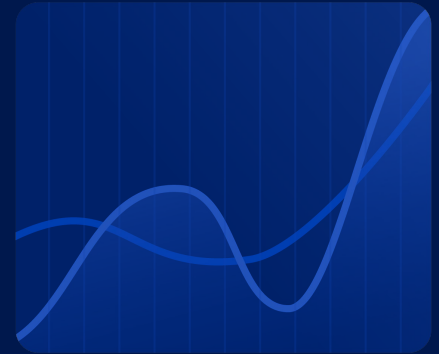
@smartsheet



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