

Everything you need to know about administering Smartsheet at scale.

# Smartsheet IT System Administrator Guide

**Overview of the tips and step-by-step guidelines that you'll find in this guide:**

- Provisioning and deprovisioning of Smartsheet user accounts
- Creating and managing groups
- Managing access to various Connectors/Integrations
- Configuring authentication methods
- Hardening security settings
- Managing branding and account personalization options
- Controlling global account options and profile visibility
- Setting working days and resource management parameters
- Highlighting important recurring tasks and housekeeping items
- Advancing your Smartsheet administrative environment with Event Reporting

## Read before using


Whether you are just getting started with Smartsheet or you want to become an expert in its administration, governance, compliance, and security, this guide will take you through everything System Admins should know. Beginners will learn everything from provisioning and deprovisioning of Smartsheet user accounts to guidelines on managing licenses and administering different user permissions. It will also help advanced System Admins, configure authentication options, governance controls, security parameters, and more. After reading this guide, you'll know how to correctly administer your account based on your organization's needs, ensuring a seamless experience for your business users.

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## Smartsheet Configuration Pathways

\*Add-Ons include [Control Center](#), [Data Uploader](#), [Connectors](#), & [Event Reporting](#)

 = Recommendation

	Business Admins	Part-time Admins	Consolidators	InfoSec
User Management				
Group Management				
Authentication				
Security				
Branding & Personalization				
Domains & Auto-Provisioning				
Account & Profile Visibility				
Working Days & Resources				
Recurring Tasks				
Add-Ons*				

# Setup

## User Management

### [User Management Help Article](#)

- Adding, editing, and removing users give you the ability to control who has an account in your system. We have different license types that are available to be assigned to users, and they are separated into the Smartsheet application and Smartsheet Connectors
- [Smartsheet User Types](#)
- [Smartsheet Connector User Types](#)

## Removing Users - Very Important

- When removing users from your Smartsheet account, it is important to understand what items they own and what systems they are connected to. When a user is removed, all of the items they are owners of get transferred to a new user selected by you. This includes removing all of their [workspaces](#), and putting all items into the sheets folder for the selected user.
- Transferring ownership of a workspace allows you to leave assets in place, and continue to maintain the hierarchy and sharing permissions already established. You can find more information about it [here](#).
- There are other assets that can be associated with Smartsheet user accounts, they include Smartsheet Connectors workflows, Smartsheet Data Uploader workflows. These are not available in the Smartsheet application user interface, please [contact Smartsheet Support](#) to determine if these exist for users you are deleting. **Warning: If you delete users without properly transferring these assets, you may affect your data workflows.**

## Smartsheet Asset Ownership

- Smartsheet has assets that are owned by a Smartsheet user account inside the Smartsheet application, including sheets, reports, dashboards, and workspaces. These assets contain data and have a designated owner and can be shared with other users, internal or external to your organization (you can also control who can be shared to items, find that information [here](#)). There are also assets that are metadata “based”: collaboration, automation, and project management.
  - [Sharing Permission Levels](#)

- [Changing ownership](#)
- A few of our premium apps also have ownership of their assets designated by Smartsheet user accounts.
  - [Smartsheet Control Center](#)
    - Smartsheet has a primary lead for each program. Note: It is possible for an organization to have multiple Control Center programs (e.g. PMO and Finance might have their own Control Center programs). A primary lead will only have access to see the users that are assigned in their program.
  - [Data Uploader](#)
    - Users who define a workflow are the only ones with access to that workflow.
  - Connectors
    - The [Salesforce](#), [Jira](#), and [Microsoft Dynamics 365](#) Connectors all work virtually the same way.
      - Someone or some service account will own the connection between Smartsheet and the application in question. That account needs to have admin permissions in both Smartsheet and in the other application.
      - Once the connection has been established, other users will create (own) workflows.
      - Connector admins will only be able to edit and control the workflows they've created, but will be able to see all workflows created by their users. For workflows created by other users, admins will only have "Disable Workflow" or "Delete Workflow" options.
      - If the Connector admin is trying to limit the users who can create workflows or keep track of who is creating them, they will want to enable the ["Restrict Users" option](#). This will allow them to know at a glance who can create workflows and that users not on that list cannot create syncs.

## [Groups](#)

- Groups allow you to manage who can access what data within Smartsheet more efficiently.

## Security, customization, and account features for Enterprise Plans

- Smartsheet allows you to configure user authentication to give you control over what methods you want to allow users to authenticate into the Smartsheet application.
  - [Authentication methods](#)
    - Email and password
    - [Google](#)
    - [Microsoft Azure AD](#) (Best option for [Consolidators](#) with Microsoft 365)
    - [Apple](#)
    - [SAML - FAQ](#) (Best option for [Infosec](#))
  - [User Auto Provisioning](#)
    - User Auto Provisioning allows you to automatically add users to your account who match the domain for your account.
- [Approved domain sharing](#)
  - Smartsheet allows users to share assets with other users, including sheets, reports, dashboards, and, workspaces. This feature allows you to configure who your data is being shared with, and restrict it if you choose to do so.
- [Publishing controls](#)
  - Smartsheet gives users the ability to publish data which allows people who are not part of your organization to access data without an account. You can publish data as read-only or editable. You can also restrict publishing to users within your account, or disable it completely.
    - [Sheet publishing](#)
    - [Report publishing](#)
    - [Dashboard publishing](#)
    - [Calendar publishing](#)

## Global Account features and settings

- Smartsheet gives you granular controls to enable and disable certain features on the platform. Here is a listing and a quick explanation of each and why you should care about them:
  - [Automation permissions](#)
    - Smartsheet allows you to define the scope of who notifications to go when using the Automation feature.
  - [Working days](#)
    - Would you like to be able to define, at a system level, the working days for project management?
  - [Resource management](#)
    - The Smartsheet resource management feature can be turned on and off at an account level. If this is turned off, users will not have the ability to use resource management features in Gantt view.
  - [In-app chat](#)
    - You have two different options for users to participate using chat applications inside the Smartsheet application. This will help you enable or disable the services you would like to use.
  - [File attachments](#)
    - Smartsheet offers users to upload attachments to sheets. We offer you the ability to control which ones are enabled and disabled.
  - [Profile visibility](#)
    - Smartsheet gives you the ability to control what is shown in user profiles in contact columns.
  - [Custom help, welcome, and upgrade screens](#)
    - You can give Smartsheet some personalization by creating a custom Help, Welcome, or Upgrade screen.

## Account branding and personalization

- Maintain your organization's brand recognition by applying custom colors and uploading your logo to Smartsheet. The color settings and logo branding that you apply will be displayed in the Smartsheet application, as well as in automated email messages sent out from Smartsheet.

# Housekeeping

- [Backups](#)
  - [One-time or recurring backup](#)
  - Smartsheet allows you to get backups of data from the application.
  - [Smartsheet Backup Tool](#)
  - Are you interested in doing a backup of all your data in Smartsheet? We provide a java utility tool to help you with that.
- [Activity Log](#)
  - Smartsheet allows you to see who did what and when they did it for sheets and dashboards.
- **What happens when your System Admin leaves?**
  - Here are some best practices for setting up your Smartsheet account, so you don't need to worry about transferring System Admin responsibilities: When setting up any workflows, Connectors, and solutions is to set the owner/lead user to an admin user account, such as admin@customerdomain.com. If this admin account owns the items, nothing will need to be transferred if a specific employee leaves or changes responsibilities on the team.
    - In Activity Log, changes made to sheets by an admin user are clearer than changes made by a specific employee who owns the configuration.
    - Removing a Smartsheet account can break Connector workflows, connections to a Jira server or Salesforce instance, or break configurations in one of our many premium apps. As long as the admin@ user stays an active user in the Smartsheet plan, no assets will need to be transferred.