

74IT - License and User Management at Scale

Top 20 Questions & Answers

1. **Q: Why should I use Directory Integration?**

A: Managing your enterprise identity and authorization is a core IT function, one that is critical to maintaining compliance. With Directory Integration your IT team can centrally manage Smartsheet users in the organization using your existing enterprise directory service to provision and deprovision users, and manage user profile information.

Directory Integration reduces the time a Smartsheet SysAdmin would dedicate to user management tasks. One of the key benefits of this feature is that it simplifies user provisioning, and deprovisioning. When a user is no longer in your enterprise directory, they will not be able to access Smartsheet. With Directory Integration, you can orchestrate workflows to automate user onboarding. This also frees up the license to be provisioned to someone new.

By syncing your directory data into Smartsheet, you can also generate a Chargeback Report to perform internal chargeback processes based on department or cost center.

2. **Q: What are the prerequisites for Azure AD Integration?**

A: This feature is only available for customers on an Enterprise or Premier plan. Additionally, you must have an Azure AD Premium P1 or P2 subscription.

3. **Q: What is the difference between Azure Active Directory (AD) Integration and Azure AD SSO?**

A: Azure AD Integration allows you to use Azure AD as your system of record for provisioning users into Smartsheet i.e. you can add/remove Smartsheet users from Azure AD.

Azure AD SSO allows you to login into Smartsheet using your Microsoft O365 work accounts.

You can use Azure AD Integration independently of Azure AD SSO and vice versa.

4. Q: What happens if I directly update users in Smartsheet if those users were provisioned via Azure AD?

A: In-app updates made to directory integration users will be overwritten in the next sync from Azure AD. We recommend that you don't make any in-app updates via Admin Center or Account Admin section for users who were provisioned via Azure AD.

5. Q: How do I add an unlicensed Smartsheet user via Azure AD?

A: Add the AD user to the AD group with the SMARTSHEET_USER role to make them an unlicensed user. An unlicensed user added via AD shows up in Admin Center User Management once they login to their account or are the recipient of an action such as a sharing or an update request.

6. Q: What happens when a user in Active Directory has their email changed?

A: The email change request is sent to Smartsheet and the primary email address of the user is updated with the new email address. Similar to in-app primary email address changes, this does not impact existing references to the user.

7. Q: When should I use Smartsheet Groups?

A: If your organization needs to frequently share items with a given set of users inside or outside of your organization, you can organize those users into Smartsheet groups. Once created, users can directly share to those groups without having to set up individual shares..

8. Q: Can I sync Azure AD groups with Smartsheet Groups?

A: No. We have heard this request from other customers and will be supporting this in a future release.

9. Q: How long does it take to provision users via Directory Integration?

A: Azure AD has different sync times for provisioning depending on the sync configuration, # of users and groups, and sync type (initial vs incremental). Refer <https://docs.microsoft.com/en-us/azure/active-directory/app-provisioning/application-provisioning-when-will-provisioning-finish-specific-user#how-long-will-it-take-to-provision-user> for more details.

10. Q: How do I debug provisioning errors in Azure AD?

A: <https://docs.microsoft.com/en-us/azure/active-directory/app-provisioning/application-provisioning-config-problem>

11. Q: What is Azure AD Integration built on?

A: Azure AD Integration is built on SCIM 2.0 (System for Cross-domain Identity Management) which is an open, widely-adopted industry standard for automation of user provisioning.

12. Q: Is Okta slated as one of the additional providers for AD integration?

A: Yes, we have heard similar requests from other customers before, and will be supporting Okta in a future release.

13. Q: Does AD integration only work with Azure?

A: Currently, Directory Integration works with only Azure AD. We will be supporting additional providers in the near future.

14. Q: Can I use Directory Integration in Smartsheet Gov?

A: We have heard similar requests from other customers and will consider making the feature available in Smartsheet Gov in a future release of the product.

15. Q: Can Directory Integration be used to provision users into Smartsheet first-party apps such as Dynamic View and Pivot App?

A: Support for provisioning users into first-party apps such as Dynamic View and Pivot App will be added in a future release of the product.

16. Q: Why should I use User Auto Provisioning?

A: User Auto Provisioning (UAP) eliminates the overhead of adding users to your Smartsheet account. Once you prove ownership of your company's domain (for e.g. acmecorp.com) any user with an email address in that domain is automatically added to your Smartsheet account when they login or interact with Smartsheet for the first time. This prevents creation of orphaned/stray user accounts and you have greater control and visibility over Smartsheet usage of those users.

17. Q: Can I use User Auto Provisioning with Azure AD Integration?

A: While you can use UAP with Azure AD Integration, we recommend centralizing on one method so that you have a single system of record for Smartsheet users. If both options are enabled, we recommend that you periodically reconcile the Smartsheet user list with your Azure AD user assignment to ensure that they are in sync.

18. Q: We have a bunch of users with duplicate Smartsheet accounts in our organization. How do I fix them?

A: If you are on an Enterprise or Premier plan, you can take advantage of the User Merge feature to fix those duplicate accounts. Learn more at <https://help.smartsheet.com/learning-track/system-admin/user-merge>

19. Q: We previously set up UAP with Azure AD assuming it was Directory integration. so we need our account rep to directory integration? is this an additional add-on? We're on an enterprise plan.

A: Directory Integration is part of the Enterprise and Premier plans. Please reach out to your Customer Success Manager or Account Rep to activate this feature.

20. Q: Do you have to have control center to use Azure AD? Is this a plugin in?

A: You do not need Control Center to use the Azure AD integration.

Azure AD integration is an additional offering.

For more information on how to onboard Azure AD Integration, we recommend that you reach out to your account rep!