

smartsheet ENGAGE /

Advanced System
Administration



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#SmartsheetENGAGE

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Why are we here?

- **De-mystifying System Administration through real world examples and best practices**

Agenda

Topics Covered

- **Best Practices** for Managing/Deploying Smartsheet
- **Account Settings** to customize user experience
- **Security Controls** for IT Policy

Questions Answered

- How do I admin/deploy Smartsheet with confidence?
- How do I make my life and the user's life easy?
- How do I make system administration as automatic (and secure) as possible?

Best Practices: User Management

A man wearing a dark fedora hat and a dark t-shirt is shown in profile, writing on a whiteboard. He is holding several markers in his right hand. The background is a bright blue wall with a large, faint smiley face graphic. The entire image has a blue color cast.

User Management Asks

How do I get **visibility** into...

- Who is using the application?
- What are they doing?

Add All Internal Employees

- System Admins can invite any internal email address to [User Management](#)
- Users can be added without granting a license
- Full Visibility & Easy licensing

Know your Reports

- “Download Userlist” shows last login & owned content
- “Sheet Access Report” shows what content each user owns & who it is shared with
- “Login History” shows last 6 month logins.

Sheet Access Report Example

Name	Workspace Name	Type	Owner	Shared To	Shared To Permission	Last Modified Date/Time (UTC)
Advanced Formulas		Sheet	john.russell+demo@smartsheet.com	john.russell+demo@smartsheet.com	Owner	5/21/2018 21:18
Adventure		Sheet	dillon.brady@smartsheet.com	dillon.brady+3@smartsheet.com	Owner	6/5/2018 18:57
All Projects	Simple Portfolio	Report	dillon.brady@smartsheet.com	dillon.brady+3@smartsheet.com	Owner	9/19/2018 12:46
All Projects	Simple Portfolio	Report	dillon.brady@smartsheet.com	john.egge@smartsheet.com	Admin	9/19/2018 12:46
All Projects	Simple Portfolio	Report	dillon.brady@smartsheet.com	kara.lumley@smartsheet.com	Viewer	9/19/2018 12:46
All Projects	Simple Portfolio	Report	dillon.brady@smartsheet.com	kelsey.soriano@smartsheet.com	Admin	9/19/2018 12:46
All Projects	Simple Portfolio	Report	dillon.brady@smartsheet.com	tyler.colton@smartsheet.com	Editor - cannot share	9/19/2018 12:46
All Projects Metrics	Simple Portfolio	Sheet	dillon.brady@smartsheet.com	dillon.brady+3@smartsheet.com	Owner	9/20/2018 18:52
All Projects Metrics	Simple Portfolio	Sheet	dillon.brady@smartsheet.com	john.egge@smartsheet.com	Admin	9/20/2018 18:52
All Projects Metrics	Simple Portfolio	Sheet	dillon.brady@smartsheet.com	kara.lumley@smartsheet.com	Viewer	9/20/2018 18:52
All Projects Metrics	Simple Portfolio	Sheet	dillon.brady@smartsheet.com	kelsey.soriano@smartsheet.com	Admin	9/20/2018 18:52
All Projects Metrics	Simple Portfolio	Sheet	dillon.brady@smartsheet.com	tyler.colton@smartsheet.com	Editor - cannot share	9/20/2018 18:52
All Projects Summary	Simple Portfolio	Sheet	dillon.brady@smartsheet.com	dillon.brady+3@smartsheet.com	Owner	9/20/2018 19:38
All Projects Summary	Simple Portfolio	Sheet	dillon.brady@smartsheet.com	john.egge@smartsheet.com	Admin	9/20/2018 19:38
All Projects Summary	Simple Portfolio	Sheet	dillon.brady@smartsheet.com	kara.lumley@smartsheet.com	Viewer	9/20/2018 19:38
All Projects Summary	Simple Portfolio	Sheet	dillon.brady@smartsheet.com	kelsey.soriano@smartsheet.com	Admin	9/20/2018 19:38
All Projects Summary	Simple Portfolio	Sheet	dillon.brady@smartsheet.com	tyler.colton@smartsheet.com	Editor - cannot share	9/20/2018 19:38
At Risk Opps		Report	john.russell@smartsheet.com	john.russell+demo@smartsheet.com	Owner	5/21/2018 21:18
At Risk Report		Report	john.russell@smartsheet.com	john.russell+demo@smartsheet.com	Owner	5/21/2018 21:18
At Risk Report		Report	john.russell@smartsheet.com	sethgoodman@company.com	Editor - can share	5/21/2018 21:18
Brand Development Project	Sights Training	Sheet	john.russell@smartsheet.com	john.russell+demo@smartsheet.com	Owner	5/21/2018 21:18
Brand Development Project	Sights Training	Sheet	john.russell@smartsheet.com	john.russell@smartsheet.com	Admin	5/21/2018 21:18

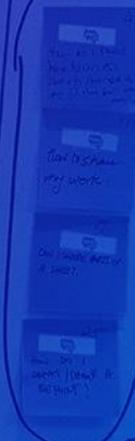
Have a Backup SysAdmin

- By default there is only a single system admin
- # of Admins is unlimited
- Provisioning, Deprovisioning, & general oversight

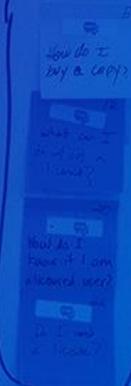
Best Practices: Deploying Smartsheet

- 1) What things Smartsheet can do that other productivity apps cannot
- 2) What some time-saving best practices are
- 3) What a Sheet, Sight, or Report is
- 4) What permissions they have to a sheet
- 5) Where their shared items are saved
- 6) Where to find Templates
- 7) How to start a new project
- 8) How to share sheets with others
- 9) How to set up their personal profile
- 10) How to edit Column Properties
- 11) How to create Web Forms and Update Requests (copy of alerts)
- 12) How to comment and attach files in a sheet
- 13) How row hierarchy works
- 14) How to re-share?
- 15) How to set up Notifications

SHARING



LICENSE



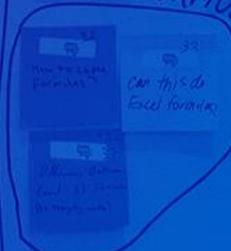
LEARNING



VALUE



FORMULAS



Deploying Smartsheet Asks

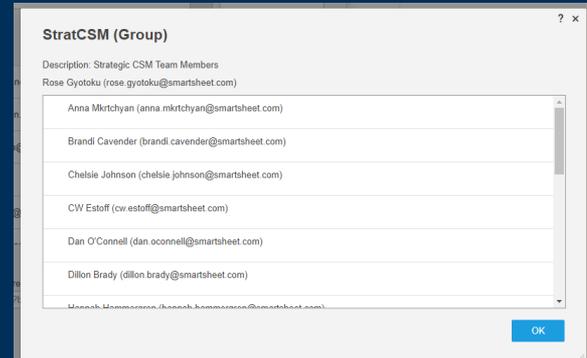
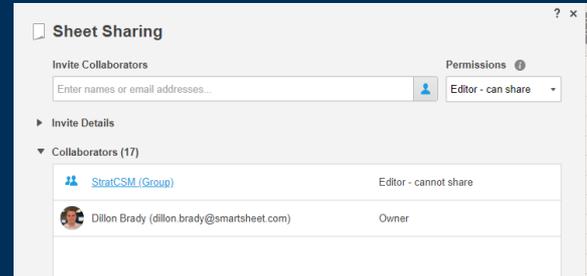
How do I make it easy to get started?

- Creating Sheets
- Sharing with other folks at the company

What are the best resources for new users?

Set up Groups for users

- Groups can be shared to collateral just like individual users
- Additions & Removals to the group update sharing
- Group Admins ≠ System Admins



Socialize Workspace

- Navigation & context are simplified
- Allows two levels of sharing
- Makes Reports more dynamic

Name	Sharing	Owner	Last Update	Workspace Shared To
Dashboard	Workspace	Dillon Brady	11/09/18	Dillon Brady (Owner), John Egge (Admin), Kelsey Soriano (Admin), Tyler Colton (Editor - cannot share), Kara Lumley (Viewer), Smartsheet Product Managers (Viewer)
Templates	Workspace	Dillon Brady	11/09/18	
All Projects Summary	Workspace	Dillon Brady	20/09/18	
Project Dashboard	Workspace	Dillon Brady	20/09/18	
Project Sch. 1	Workspace	Dillon Brady	19/09/18	
Project Sch. 2	Workspace	Dillon Brady	20/09/18	
Project Sch. 3	Workspace +	Dillon Brady	20/09/18	
Project Sch. 4	Workspace	Dillon Brady		
Project Sch. 5	Workspace	Dillon Brady	19/09/18	

This sheet is also shared with:
Livingston Chaffee

Report Builder

Matching rows found: 58
Not sorted

Run Columns

Where? Restrict to: 7 sheets in scope
Simple Portfolio

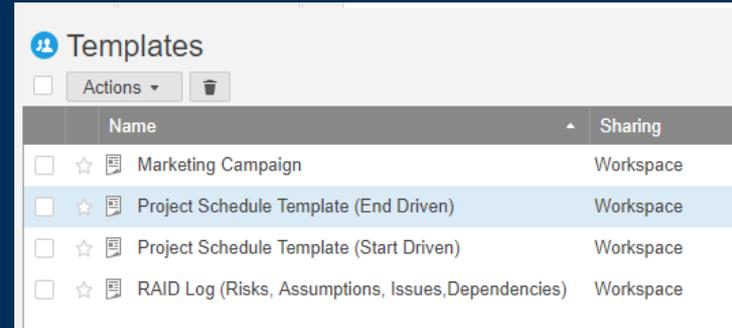
Who? Click Who button to report against a Contact List column.

What? % Complete is not equal to 1 and Level is equal to 2 or is equal to 3

When? End Date is in the past

Templates Workspace

- Any single Smartsheet can be turned into a Template
- Used to standardize sheets for reporting & simplicity
- Makes getting started easier



The screenshot shows the 'Templates' workspace in Smartsheet. At the top, there is a header with a user icon and the title 'Templates'. Below the header, there is a toolbar with an 'Actions' dropdown menu and a trash icon. The main content area is a table with two columns: 'Name' and 'Sharing'. The table lists four templates, with the second one, 'Project Schedule Template (End Driven)', highlighted in blue.

	Name	Sharing
<input type="checkbox"/>	Marketing Campaign	Workspace
<input type="checkbox"/>	Project Schedule Template (End Driven)	Workspace
<input type="checkbox"/>	Project Schedule Template (Start Driven)	Workspace
<input type="checkbox"/>	RAID Log (Risks, Assumptions, Issues, Dependencies)	Workspace

Evangelize Self-Serve Resources

- Great “first line of defense” against common questions from new users
- **Center of Excellence**
 - Certification, Self Paced Learning
- **Learning Center**
 - “Wiki” on all things Smartsheet
 - Video Center for 3-5 min topic-specifics

Resource Portal Example

Guide to Success with Smartsheet

Welcome

Training

Advanced

Use Cases

Get Help

Ready to Up Your Game?

Are you ready to expand your use of Smartsheet and crush barriers to success? On this page you will find information about how to transform your disparate business tools into a fully-integrated ecosystem.

Interested in delivering project & process consistency? Discover how you can deliver operational control at scale through Smartsheet Control Center.

Smartsheet. Less Talk, More Action.



Integrate

[Smartsheet For Salesforce Connector](#) - Gain real-time visibility and enable all of your teams to easily organize, update, and share Salesforce Information

[Smartsheet Jira Connector](#) - Unite your teams and unlock visibility and access to Jira data for all stakeholder functions

Additional Integrations:

- [Smartsheet Apps & Integrations](#)
- [ServiceNow Integration](#)
- [Smartsheet Live App for Quip](#)
- [Smartsheet Calendar App](#)

Work at Scale

Deliver work at scale with [Smartsheet Control Center](#).

Learn how Smartsheet Control Center can help you to improve consistency of delivery, prioritize work and drive adoption of best practices across your organization.

Watch the video to learn more!



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Resource Portal Example 2

Company X | Smartsheet Resource Portal

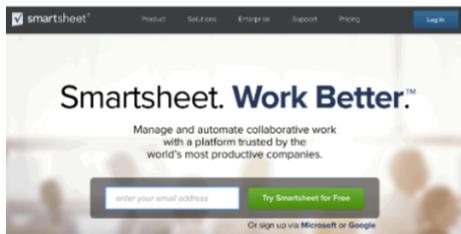
Welcome to the Smartsheet Resource Portal

Welcome! This resource is designed to give Smartsheet users a one-stop shop to find tools and resources that will optimize your use of Smartsheet.

Beyond the core Smartsheet product, there are additional resources available including our Center of Excellence training program and additional add-on applications. See below for additional information on how to get started.

If you have any questions, please don't hesitate to reach out to ___. Thank you!

Watch Smartsheet's 4 minute onboarding video!



Click Here to Request a Smartsheet License!



Product Information

- [Product Tour \(existing functionality\)](#)
- [Product Updates & Enhancement Requests](#)
- [Release Notes](#)
- [Smartsheet Status \(sign up for email alerts!\)](#)
- [Smartsheet Solutions](#)

Smartsheet Account Team

Customer Success Manager
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Account Executive
David Gatto
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425-324-2347

Mobile App Info



Other Help Resources

- [Getting Started Checklist](#)
- [Support Center](#)
- [Video Center](#)

Smartsheet Dashboards | Guide to Getting Started

What are Dashboards?

Dashboards are the perfect way for individuals, managers and executives to get a quick, visual status of their top projects, see summary reports on goals, view important deadlines, and follow links to key information -- all in one, customizable view. When building a new Smartsheet solution, we recommend starting with your end goal in mind and then building your sheets and reports to support that vision! Please feel free to contact your Customer Success Manager if you'd like to discuss further.

Account Settings

Status	Assigned To	Start Date	Due Date	Budget	Actuals	% DI
Complete	Elizabeth Bennet	07/31/17	08/01/17	\$5,000	\$3,755	
Complete	Elizabeth Bennet	08/01/17	08/04/17	\$10,000	\$9,278	
Complete	Elizabeth Bennet	08/01/17	08/04/17	\$5,000	\$5,315	
Complete	Elizabeth Bennet	08/07/17	08/11/17	\$5,000	\$4,714	
Complete	Emmitt Fitzgerald	08/07/17	08/11/17	\$25,000	\$27,808	
Complete	Emmitt Fitzgerald	08/07/17	08/11/17	\$25,000	\$26,779	
Complete	Roman Mars	08/14/17	08/21/17	\$65,000	\$68,280	
Complete	Roman Mars	08/21/17	09/01/17	\$65,000	\$67,310	
In Progress	Charlotte Lucas	09/04/17	09/08/17	\$75,000	\$73,000	
Not Started	William Darcy	09/11/17	09/22/17	\$70,000		

Account Settings

User Experience

- **Colors & Logo Settings**
- **File Attachment Options**
- **Custom Help Screen***

Process Controls

- **Account Discovery**
- **Custom Upgrade Screen***
- **Custom Welcome Screen***

* Denotes Enterprise-only

Colors & Logo Settings

- Sets a standard for all users moving forward
- Impacts background, forms, and alerts
- Strict OR user-editable

Colors & Logo Examples



Here's a quick update on "Campaign Calendar".

Campaign Calendar

Row 5

Prio

Campaign Title Poets are powerful additions to any marketing team.

Details NEW: The Poetry in Copywriting (or How Poets Make Money)

Approved By Anna Mkrтчhyan

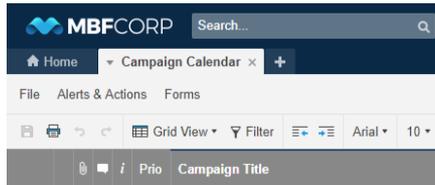
Assigned To Jess Smart

Draft Due 10/31/17

Draft Status

Objective Customer Support

Target Existing Customer



Bug & Issue Tracker

Log product defects, unexpected behaviors, and performance issues. For fastest response from QA and product teams, please be clear and precise.

Issue *

Quick description of the bug

Details *

Describe exact steps to reproduce the bug.

File Attachments

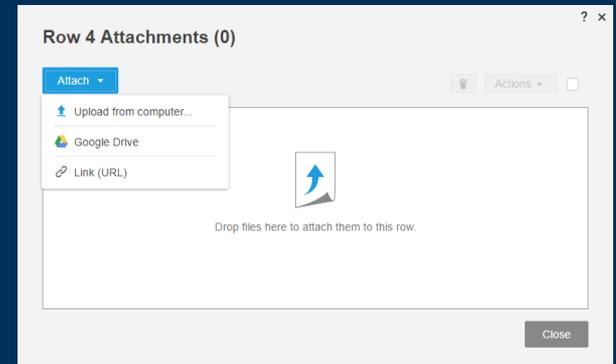
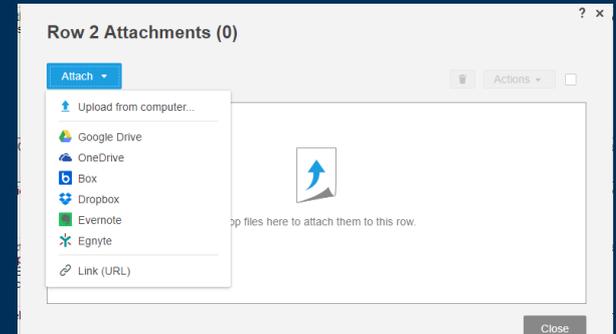
file name

Upload

Submit

File Attachment Options

- Restrict which attachment options folks can use
- By default, any available can be used
- Helpful if your company has a single provider or requirements



Account Discovery

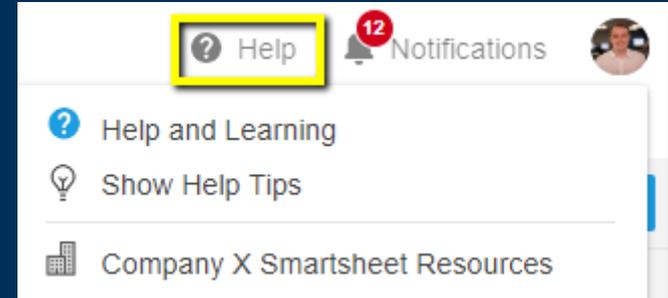
- Allows for same-domain users to “discover” your account and ask to join from Smartsheet.
- Helps folks who are trialing or exploring Smartsheet end up in the right spot

Process Controls

Custom Help Screen

- Add a URL with a custom title to the Smartsheet “? Help” dropdown
- Commonly used to redirect to company-specific help collateral.
- **Best Practice:** Create a Smartsheet Dashboard for this purpose

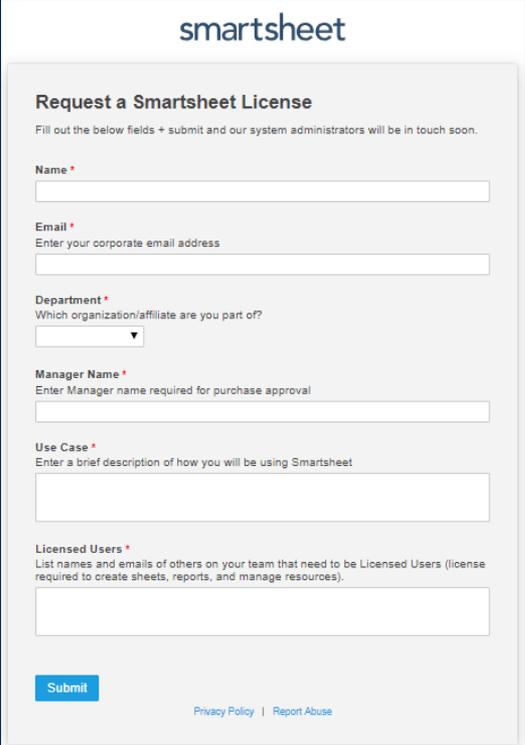
Process Controls



Custom Upgrade Screen

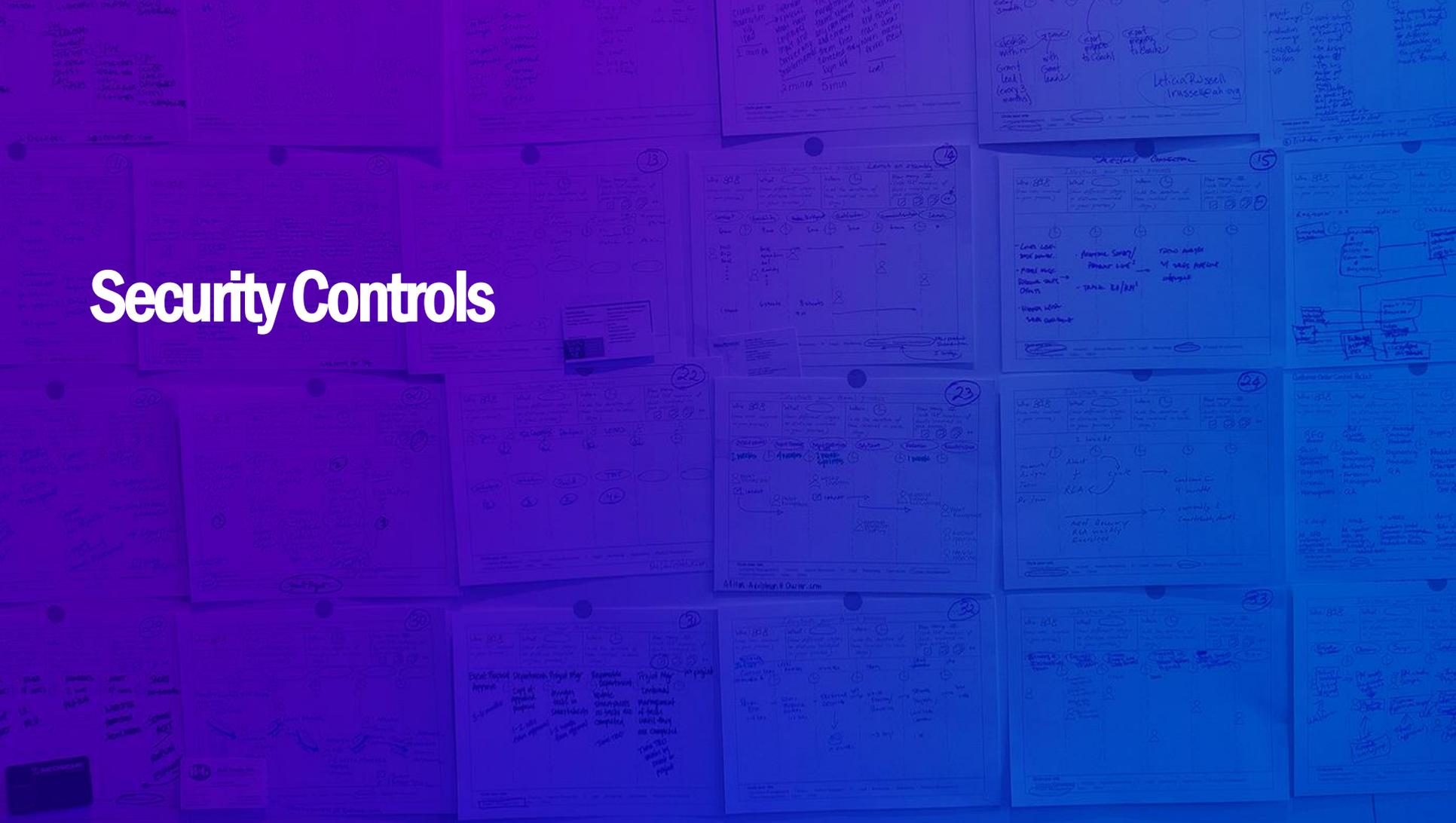
- By default, unlicensed users send emails to system admins to request licenses
- Custom Upgrade Screen is a redirect URL replacing the email.
- Commonly redirects to a Software Asset Management System (ServiceNow), or a Smartsheet form.

Process Controls



The screenshot shows a web form titled "Request a Smartsheet License" on the Smartsheet website. The form is set against a light gray background with a white header containing the "smartsheet" logo. Below the title, there is a sub-header "Request a Smartsheet License" and a note: "Fill out the below fields + submit and our system administrators will be in touch soon." The form contains several input fields, each with a red asterisk indicating it is required: "Name", "Email" (with the instruction "Enter your corporate email address"), "Department" (with a dropdown menu and the instruction "Which organization/affiliate are you part of?"), "Manager Name" (with the instruction "Enter Manager name required for purchase approval"), "Use Case" (with the instruction "Enter a brief description of how you will be using Smartsheet"), and "Licensed Users" (with the instruction "List names and emails of others on your team that need to be Licensed Users (license required to create sheets, reports, and manage resources)"). At the bottom left of the form is a blue "Submit" button. At the bottom right, there are two links: "Privacy Policy" and "Report Abuse".

Security Controls



Security Controls Summary

Why:

- Need to govern access and removal of access
- Regulate what folks can do in the app
- How do I ensure this applies to my entire company?

Key Info:

- All of these controls are **optional but recommended**.
- All controls are **self-service**.
- Intended to **satisfy IT policy requirements**.
- Smartsheet **access is simplified**.

Authentication

- **Enable all or one of the following for getting into Smartsheet:**
 - Email + Password
 - Office 365 / Azure AD
 - Google
 - SAML
- **“Single Sign On”**
- **SAML = “outsourcing” authentication to your company**

Authentication

You must select at least one authentication option.

- Email + Password
- Google
- Microsoft Azure AD
- SAML [not configured](#)

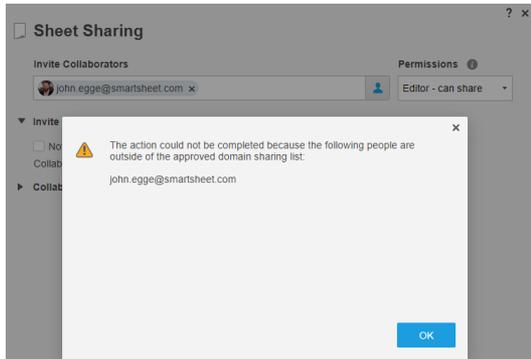
User Auto Provisioning

- **Automatically adds new Smartsheet users with company domains to your Smartsheet userlist upon login.**
- **Prohibits trials and other userlists on the same domain**
- **Used to centralize Smartsheet & enforce account settings across the enterprise.**

Other Security Controls

Approved Domain Sharing

- Specify exactly which domains (or specific people) are allowed to be shared to.
- Optionally add a URL to allow users to request additions to the whitelist.



Group Membership

- Groups can include any email address by default
- Restrict if external-to-userlist folks can be added to Groups by Group Admins

Upcoming Roadmap Developments

- **Directory Integration**
 - Sync Smartsheet with your company directory
 - A new way to automate user management
- **Event monitoring**
 - Account-wide “Activity Log”

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Next Steps

- **Apply these practices and controls where possible**
- **Click here to download sample “Custom” screens:**
 - Custom Upgrade Screen (Form + Sheet)
 - Custom Help Screen (Dashboard)
- **Visit the Enterprise Booth**

Don't forget to:

- Share your feedback in our survey in the ENGAGE app
- Stop by the Administration & Custom Solutions booth on the first floor
- Visit the Innovation Center for hands-on learning, support, services, swag, and more



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ENGAGE / Q&A

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