

# Using Smartsheet securely

As a government user you share the responsibility to keep information safe and to work securely. This guidance will help you use Smartsheet securely.

Smartsheet is a web-based project and task management tool that lets you assign work to teams or people and track progress in real time.

## Securing your account

Secure your Smartsheet account by using:

- a password made up of 3 random words
- a secure (HTTPS) connection (ensure this by using a modern browser or a Smartsheet mobile app)

If you use Office 365 or G Suite, or another service that helps you to login to applications, ask your IT team if they can connect it to Smartsheet. Use two factor authentication in that service if available.

Contact your Smartsheet administrator if you:

- think someone may have accessed your account
- lose a device that can access your Smartsheet account (you should also change your password)

## Protecting your data

To protect your data when using Smartsheet, make sure you:

- don't use Smartsheet to store sensitive, personal, or other high value data (like commercial or financial information) that could cause harm if lost or exposed
- create and use sheet permissions when you need to control access

When using Smartsheet, you should also be aware that all content can be:

- disclosed publicly under the Freedom of Information Act
- exported and viewed offline by your administrators
- subject to legal requests to share data by courts, government agencies, or parties involved in litigation in the US

Smartsheet have signed up to the EU-US Privacy Shield which means they say they follow European data protection requirements for European customers. You own the data you put in Smartsheet, and their technical security is similar to other popular public cloud services.

## Managing your information

Sometimes you need to refer back to information in Smartsheet. As a civil servant, you also need to keep save a permanent record at regular intervals or at the end of a piece of work.

Make sure you don't lose content by:

- creating a permanent record of shared information at regular intervals or at the end of a piece of work
- exporting data to your document storage or email service to capture important discussions or decisions (name the data so it can be found later)

You can export data from Smartsheet by:

- copying and pasting the text (while noting the date)
- taking a screenshot or exporting as an image
- asking your administrator to request a backup
- exporting individual sheets manually as Microsoft Excel or Project files, PDFs, or Google Sheets

## Getting started

Ensure your account looks official and similar to other government Smartsheet accounts by:

- adding your first and last name to your profile including your organisation name in brackets after your last name - for example Alex Black (MOJ)
- using your primary corporate email address

Smartsheet uses Sheets (collaborative Gantt charts), Workspaces (sheets and uploaded files), and Sights (dashboards where you can monitor progress). Most users need to be licensed but you can add collaborators to a Sheet or Workspace without using a license.

Think about how information might look in public if it were disclosed, particularly project names, or more casual interactions like comments in sheets.

## Getting help

For help using Smartsheet, you can:

- access the Smartsheet help center for guides and videos
- follow their twitter feed for examples of how to use Smartsheet

Smartsheet offer support through a:

- support page
- status page

You may also access further support from your internal IT team (if you have agreed a support arrangement with them).