

SmartBackup Playbook

Administrator Guidance



v02202026

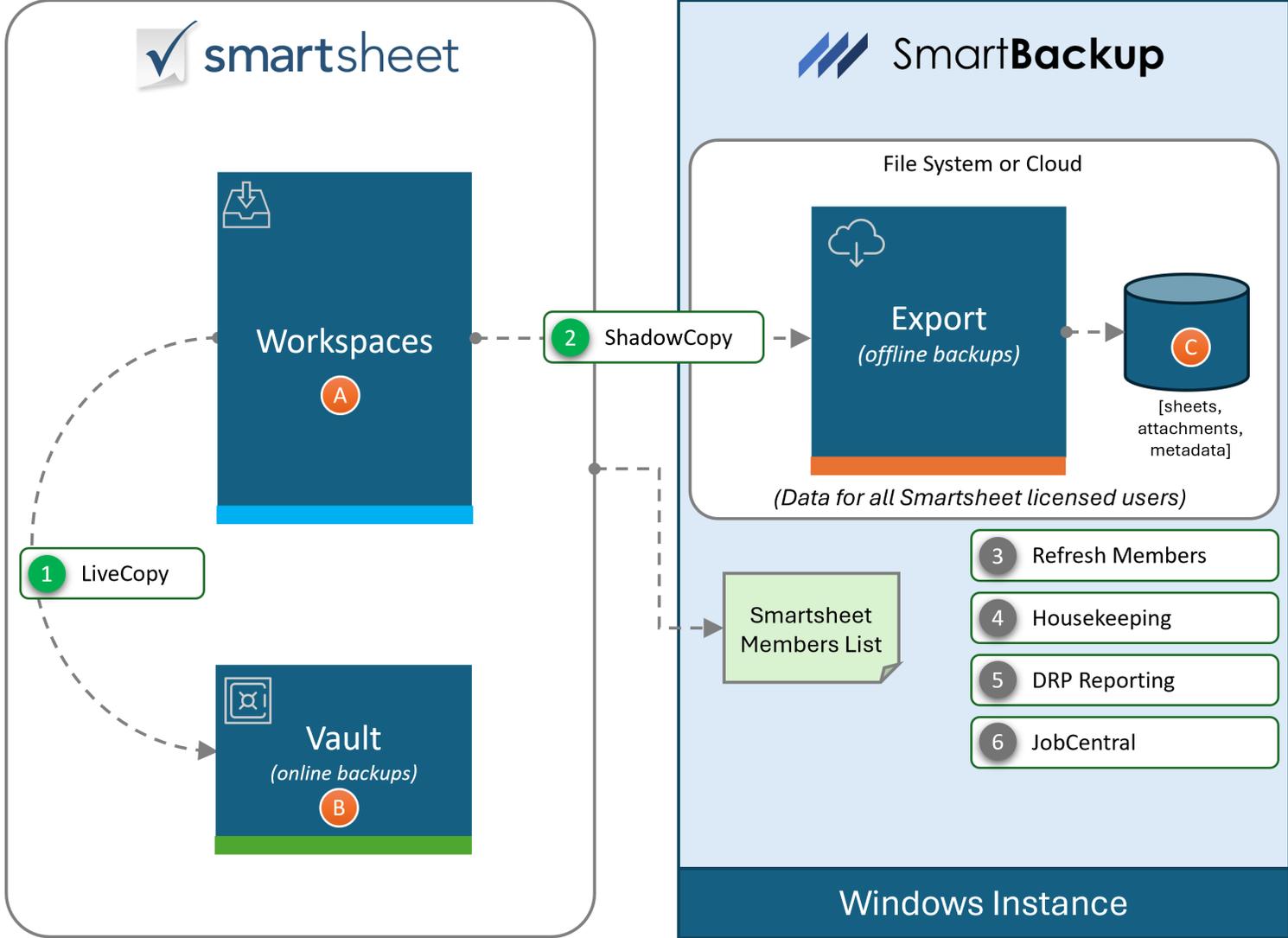
Contents

- Concepts
- Deployment and hosting patterns
- Cloud and centralized storage
- Installation notes
- Data loss recovery management
- Alerting & job management
- Contact Us



Concepts

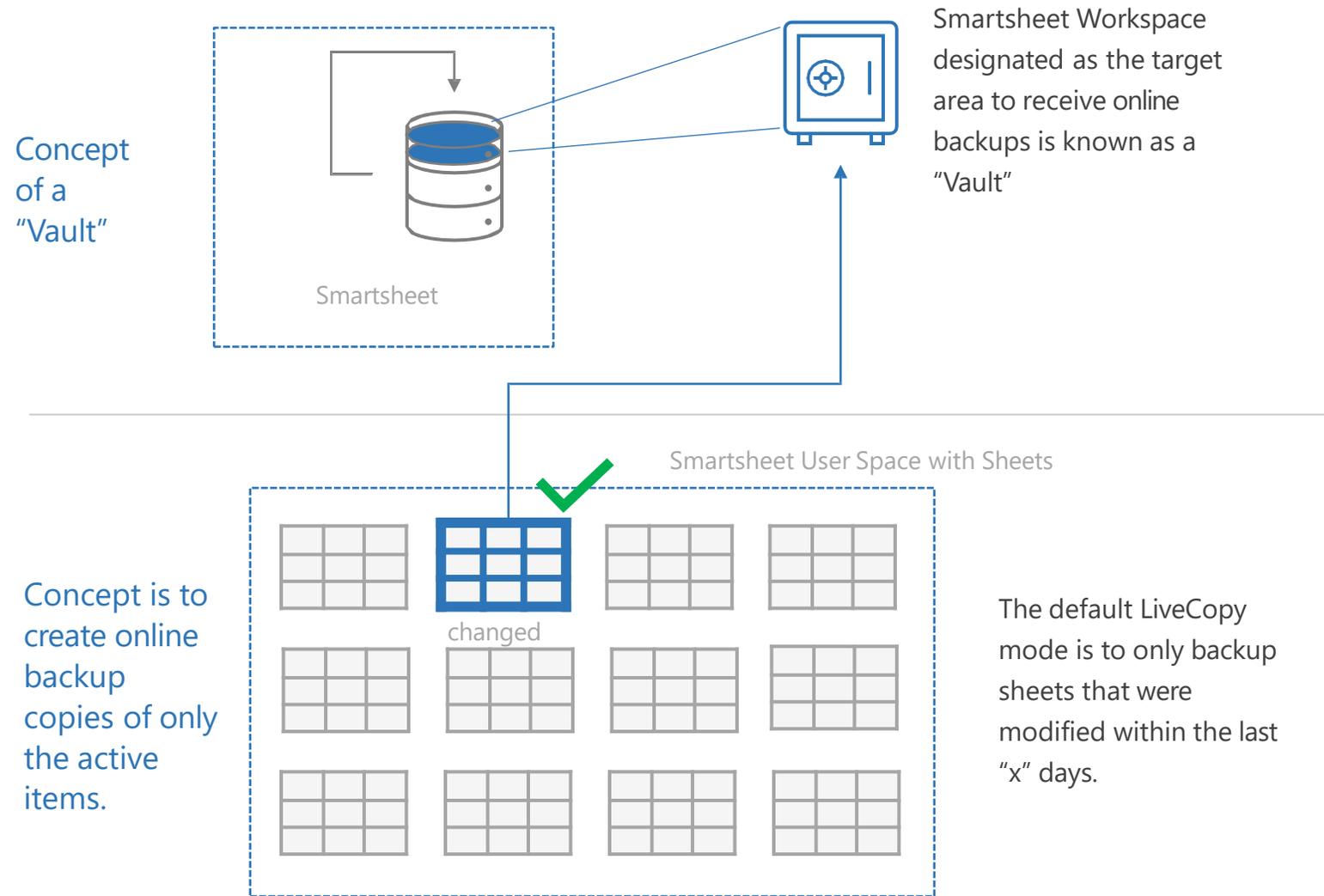
Solution Overview



Vault concept and online backups

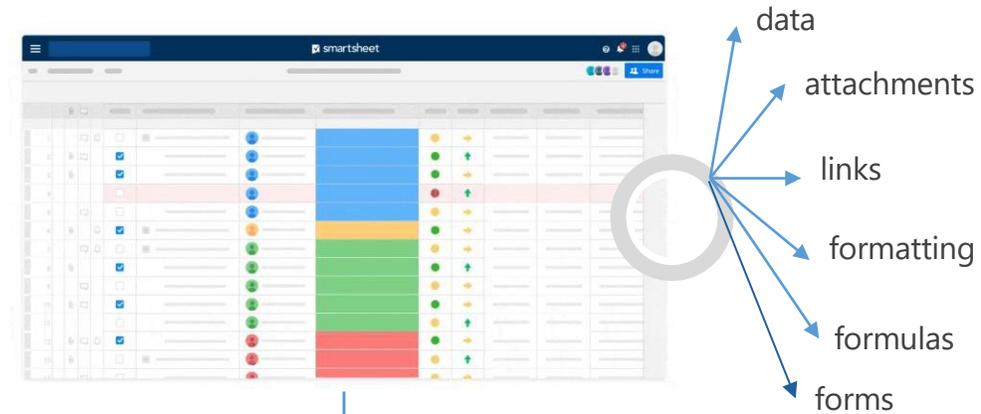
a When a **LiveCopy** operation is performed, it makes online copies of owned sheets from anywhere in the Smartsheet User account and saves them in the User's unique Vault Workspace.

b By default, **LiveCopy** creates backup copies of active sheets, which means only sheets that were modified within last "x" days will be copied. The value of x is set to 5 days by default but can be changed to any value up to 365.



Smartsheet Sheets

- C Smartsheet sheets are rich multi-faceted objects

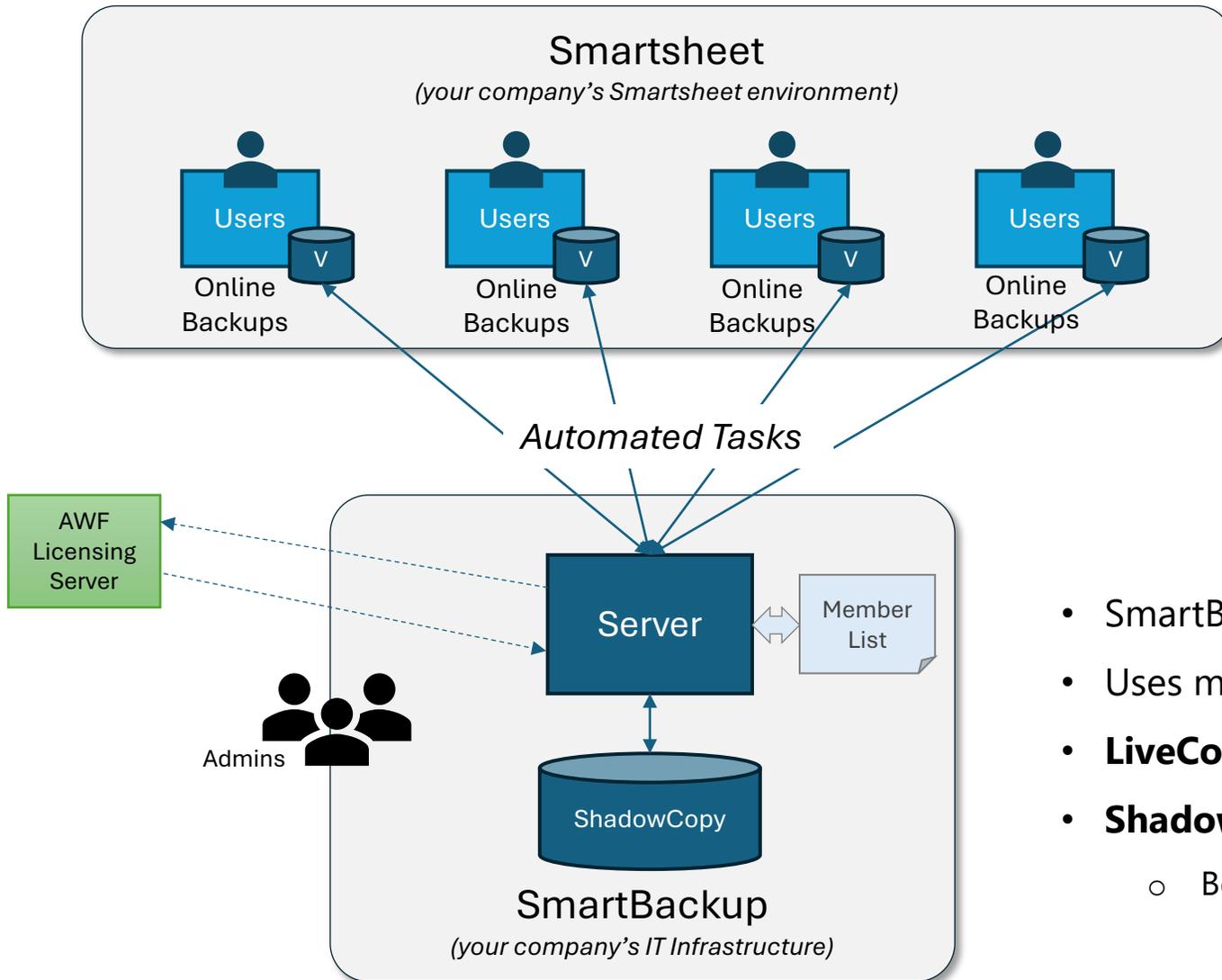


Standard Smartsheet backup tools only back up the data and attachments. This means that critical information is missing when trying to restore from one of these standard backup copies.



SmartBackup LiveCopy makes an exact copy

SmartBackup Architecture



- Backup copies saved in each user's Vault
- Most complete backup copies possible
- All automated, no user action required
- Users can restore from their individual Vaults

- SmartBackup is installed on your company's infrastructure
- Uses member list to automate backups for all users
- **LiveCopy** saves Online Backup copies in Smartsheet itself
- **ShadowCopy** saves Offline Backup copies outside of Smartsheet
 - Best for Compliance, DRP, BCP, Audit Trails, eDiscovery, etc.

Deployment and Hosting Patterns

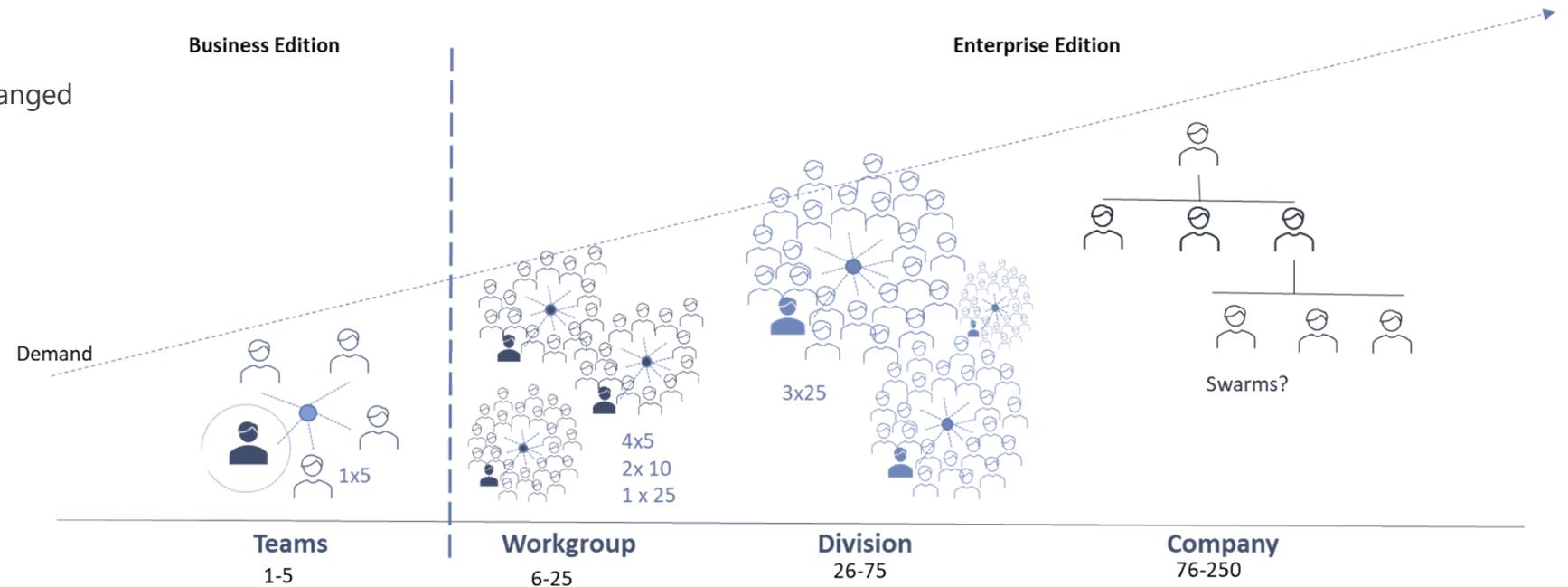
Deployment Patterns

Guidance:

1 Small groups of 5 users are best suited to deploy a **Business Edition Team deployment**.

2 Larger groups of 25 or less, are best arranged using **Enterprise Edition Workgroup deployment**

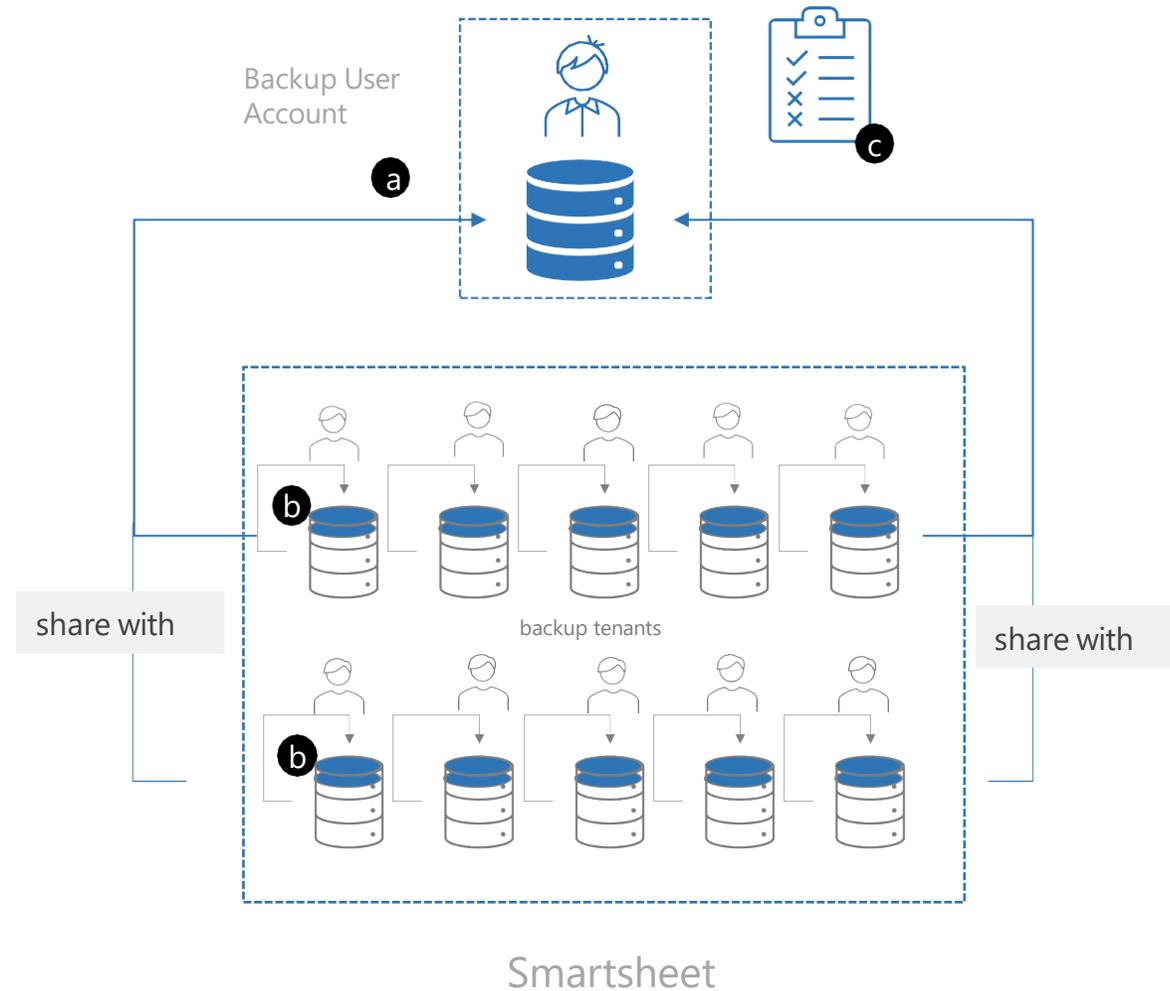
3 For large organizational Divisions or Companies, it is best to discuss and design deployment (LME's). Typically, these will use **Enterprise Edition Department, Division, Company, or Organization** models together with Multi-Instance mode, Queues, and combinations thereof.



Cloud and Centralized Storage

Centralized Vault - Option

- a** Create a specific **"Backup User" account** within Smartsheet.
- b** Every SmartBackup Member will then share their **Vault** with the Backup User account.
- c** Backup User should now have a centralized view of all the **Shared Vaults**.

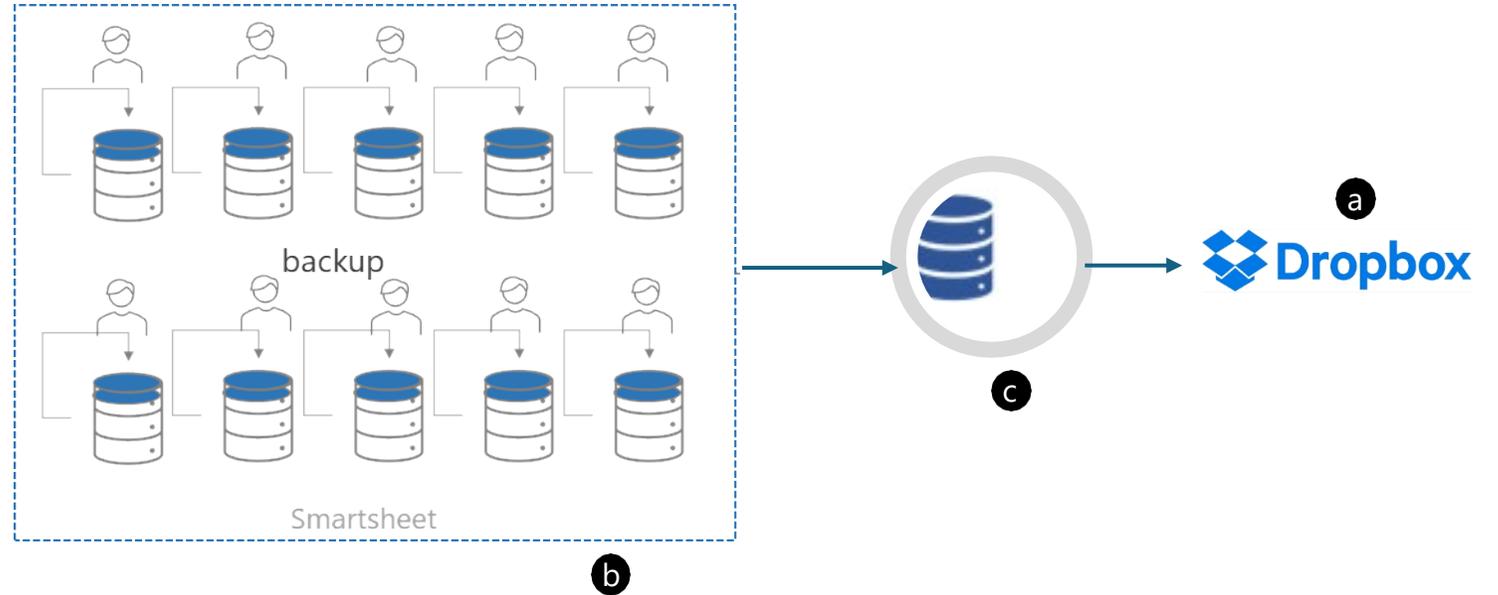


Offline Backup Cloud Sync - Option

Using "Dropbox" example:

- a** Sign-up for a **Dropbox** Account
- b** Install the Dropbox Application on the **Backup Machine**
- c** In Dropbox Windows Explorer right click the Archive or Export folder and click **sync**

Operation: Dropbox will sync your **ShadowCopy offline backups** to your Cloud Dropbox Account

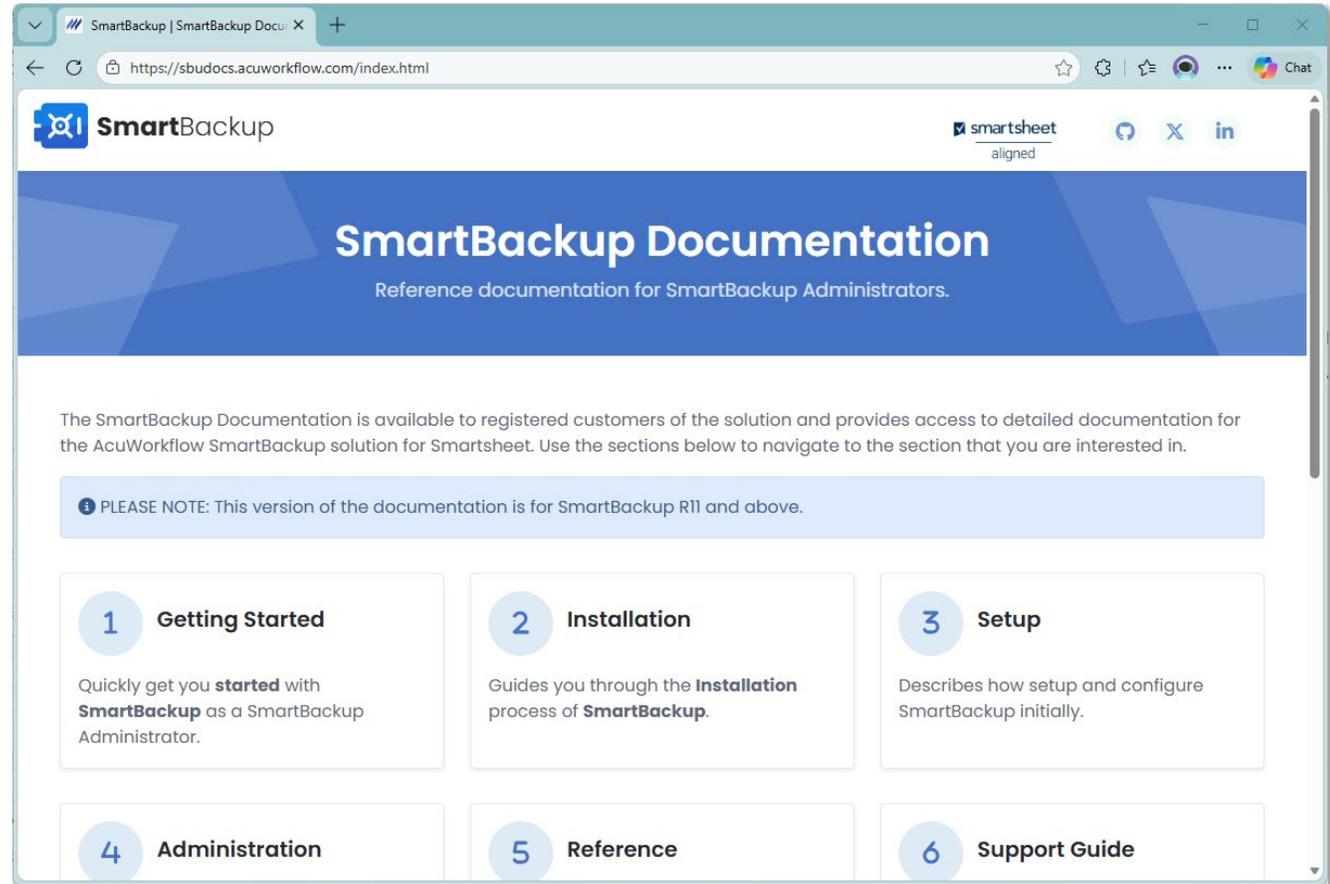


A similar way of working would apply to the premier Cloud storage providers where an upload/syncing mechanism is installed alongside SmartBackup. So, for example Azure Blob would require AZCopy and AWS S3 would require AWS CLI

Installation

SmartBackup Installation and Configuration

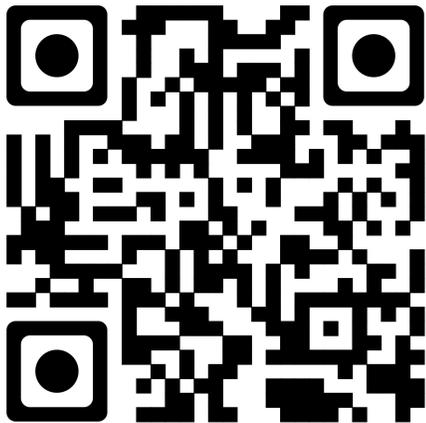
- Refer to the SmartBackup Documentation site for detailed information and guidance on how to install, configure, and customize SmartBackup in your environment.
- Go to: <https://qr1.be/TYNUUH>



Data loss recovery

Data Loss Recovery

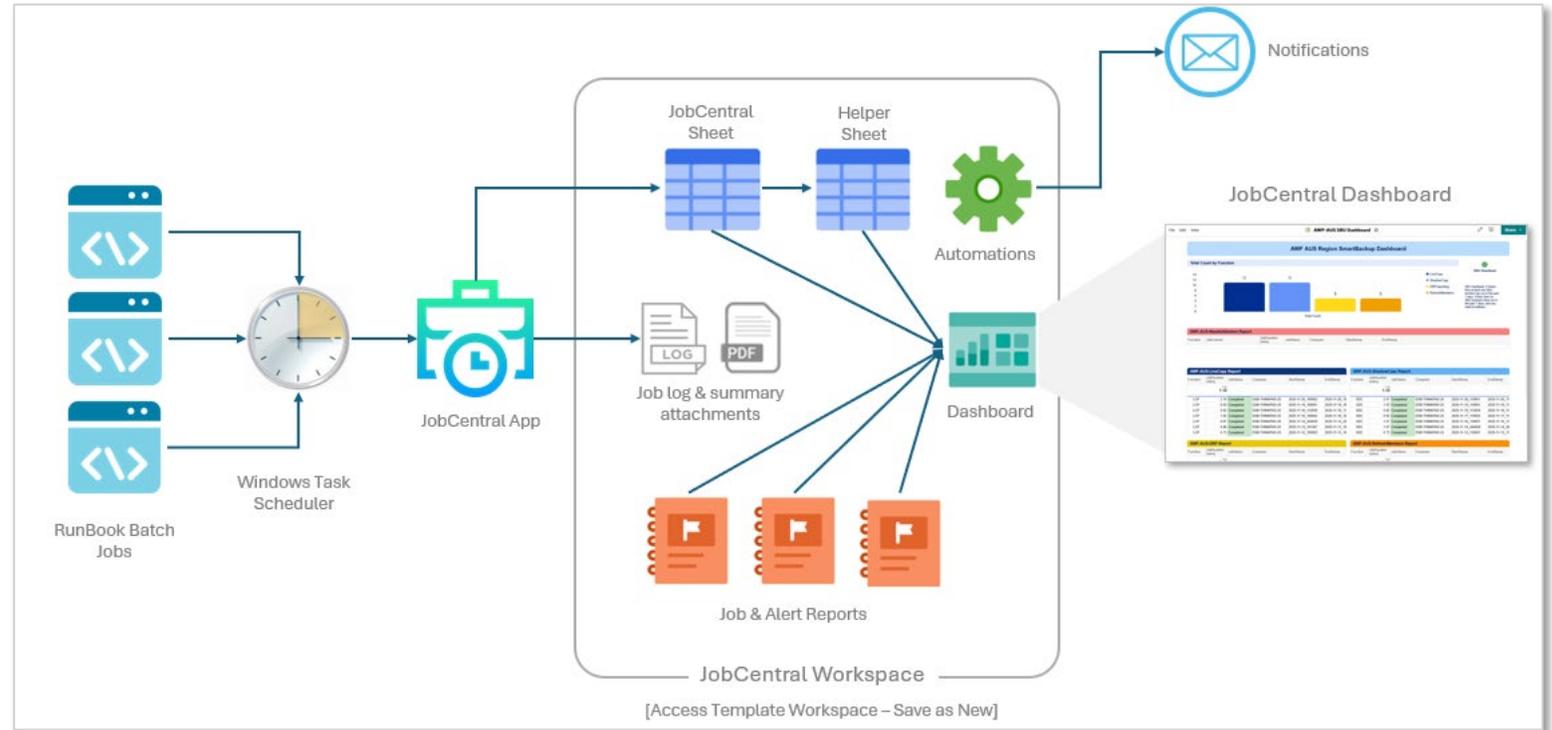
- Refer to the SmartBackup User and Admin Guides for detailed step by step videos on various data loss and recovery scenarios.
- You can find these on the SmartBackup user Guides website.
- Go to: <https://qr1.be/C14A39>

A screenshot of a web browser displaying the 'SmartBackup User Guides' website. The browser's address bar shows the URL 'https://guides.acuworkflow.com'. The website has a clean, modern design with a white background and blue accents. On the left, there is a navigation menu with three main sections: 'GETTING STARTED' (containing 'Getting Started'), 'END USER GUIDES' (containing 'End User Restore Guide'), and 'ADMINISTRATOR GUIDES' (containing 'Administrator Guides'). The main content area on the right features the title 'SmartBackup User Guides' with a 'Copy' button. Below the title, it states 'This is where you can find End User and Administrator Guides for SmartBackup from AcuWorkflow.' and 'Updated: 15 August 2025.' The section is titled 'End User Guides' and contains a welcome message: 'Hello, and welcome to the SmartBackup User Guides pages. This site contains guides in both video and document form, as well as information, tips & tricks, and other useful content, designed to help SmartBackup Administrators and End Users become familiar with the solution and how to get the most benefit out of your enterprise class Smartsheet backup environment.' Below this, it provides contact information: 'If you are a SmartBackup End User and you have any questions, then first reach out to your IT team, and if you are a SmartBackup Administrator and you have questions, please contact us using the [AcuWorkflow Support Request Form](#).' At the bottom of the page, there are three buttons labeled 'Getting Started', 'End User Guides', and 'Admin Guides', each with the SmartBackup logo. A footer at the very bottom of the page reads 'Powered by GitBook'.

Alerting & Job Management

Job Central

- **JobCentral** is the new, sophisticated job scheduling, managing, monitoring, alerting, and reporting solution for Smartsheet in general, and for SmartBackup in particular.
- Once installed and configured, **JobCentral**, together with your customized RunBooks, will replace the previous limited functionality email notifications process.
- Refer to the SmartBackup Documentation site for details on how to setup and configure JobCentral.



Contact Us

Contact Us

- If you have any questions, please feel free to reach out and contact us using the Contact Us or Support forms on our website at www.acuworkflow.com

