THE ROMAN CATHOLIC ARCHDIOCESE OF ATLANTA	INFORMATION TECHNOLOGY ARCHDIOCESE OF ATLANTA	**SOP #:**	SmartsheetBckp-001
		Revision #:	(Initial)
		Implementation Date:	11/03/2023
Page #:	1 of 6	**Last Reviewed/Update Date:**	11/03/2023
Direct any comments to:	https://help.archatl.com/		

Creating Smartsheet Backups

1. Purpose

The purpose of this document is to explain the steps necessary for performing a backup copy of the Smartsheet data you maintain.

2. Scope

These procedures pertain to the data residing in AoA's Smartsheet platform.

3. Prerequisites

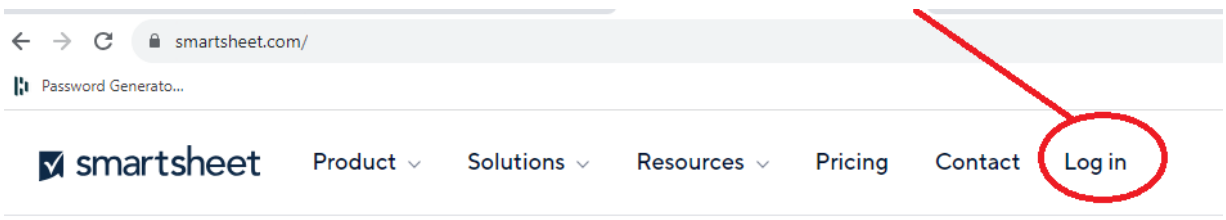
One must be the owner of the data he/she is backing up.

4. Responsibilities

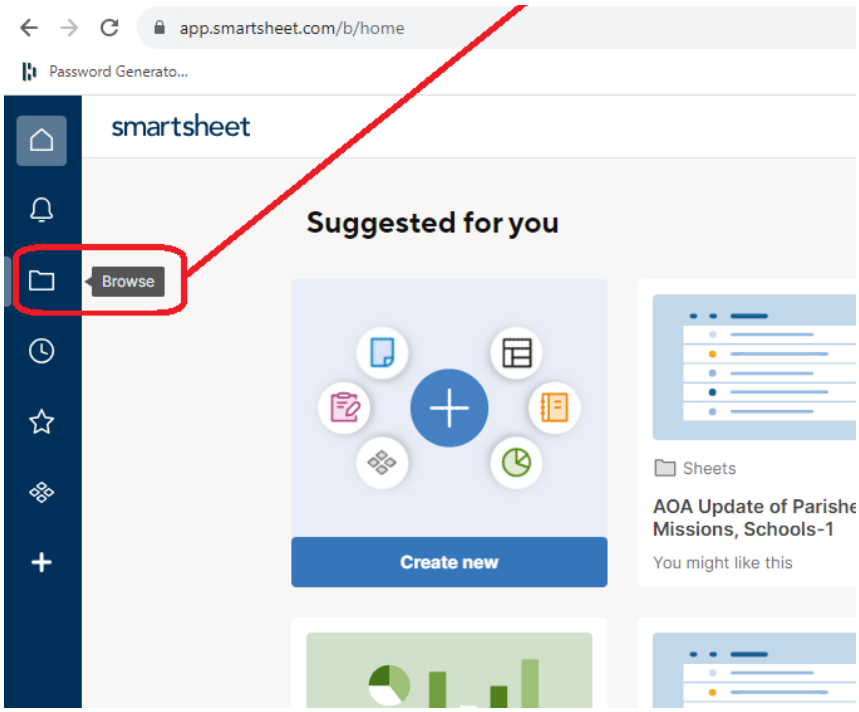
It will be the responsibility of AoA's Department of Information Technology to keep these directions updated. Should these procedures require an update, a modification, a correction, etc. – the IT department should be notified by way of the helpdesk ticketing system found at: https://help.archatl.com/

5. Procedure

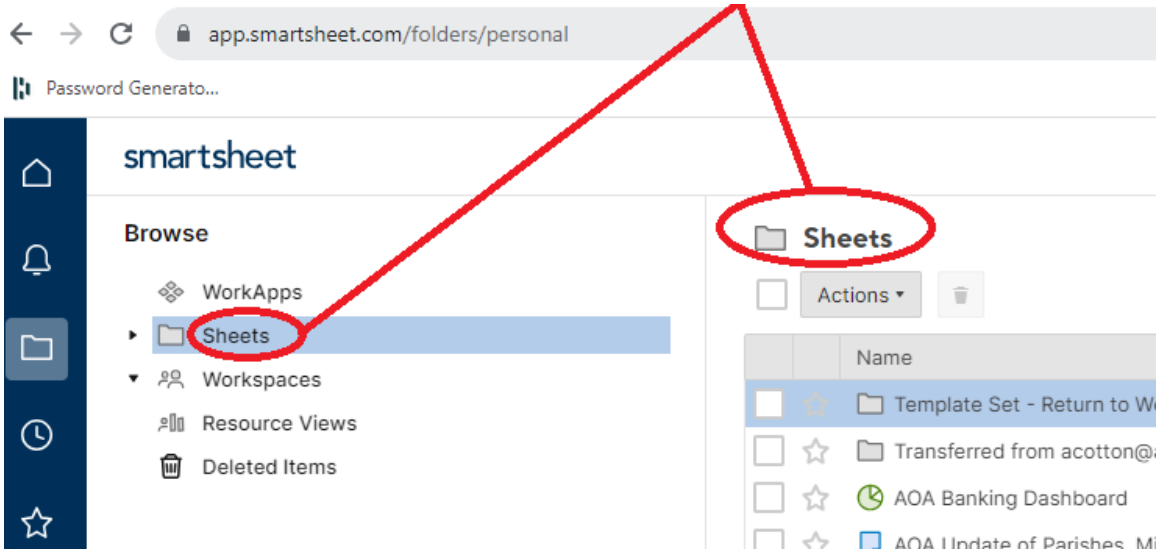
1. **Login** to Smartsheet using your credentials …



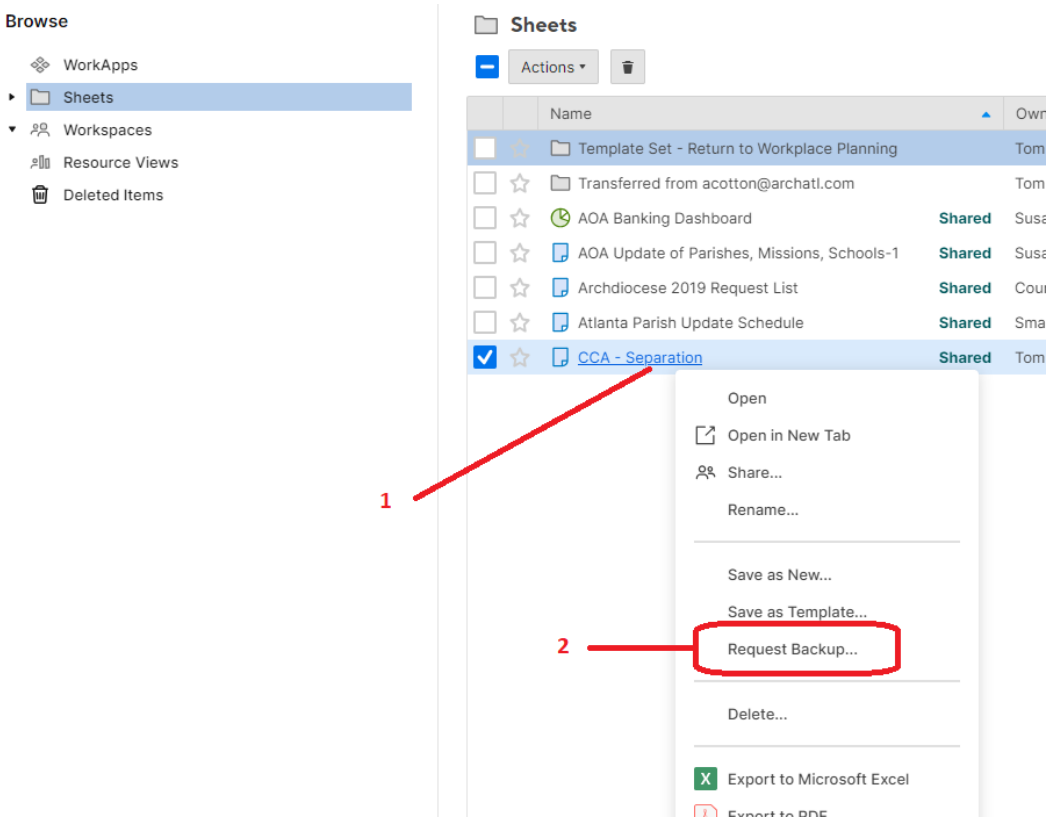
2. From the main dashboard, click the **Browse** icon on the left-side pane …



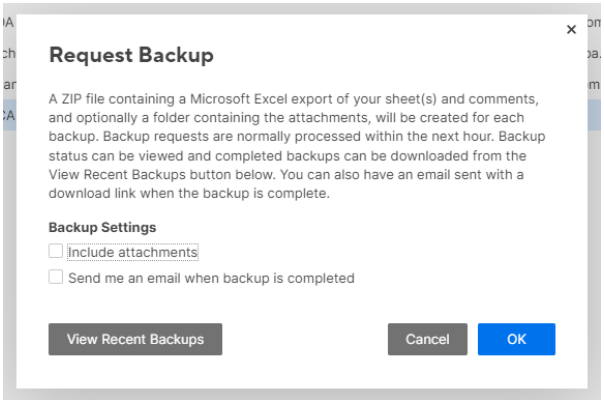
3. Open the **Sheets** dropdown to display the Sheets you can backup …



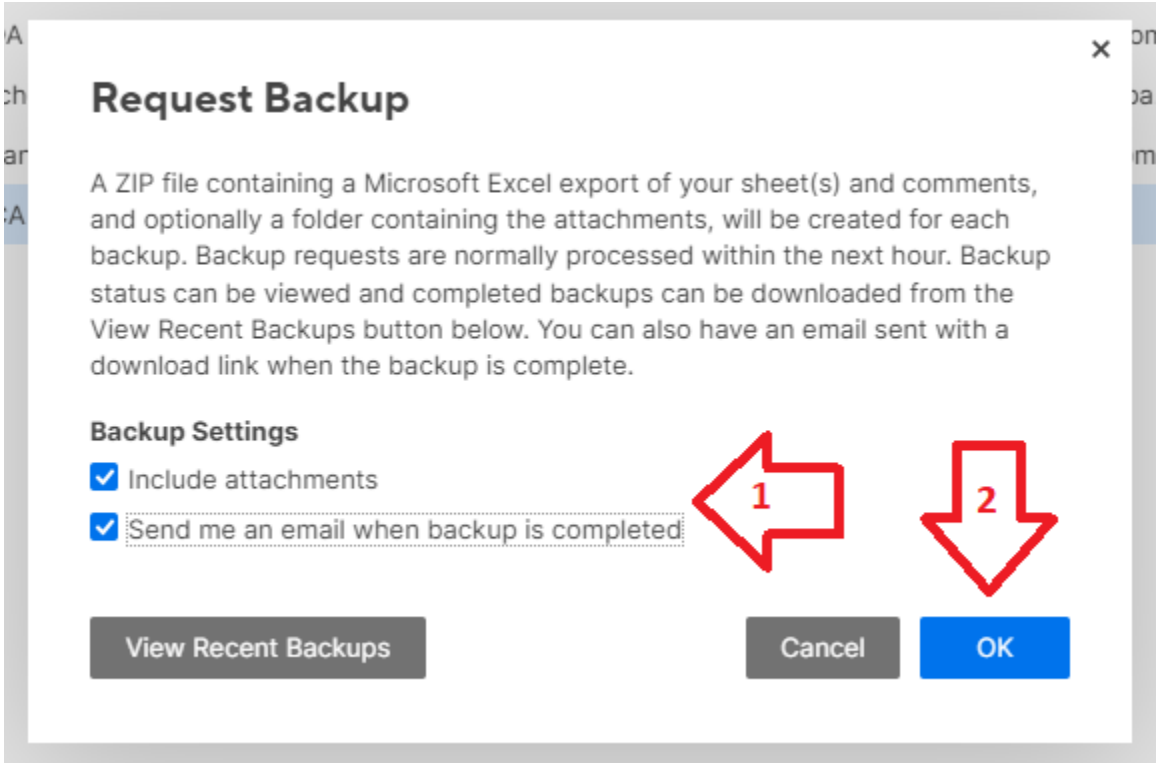
4. (1) **Right-click** on the sheet you would like to have a backup of (so that the line is highlighted with the blue arrow) and then (2) click the '**Request Backup…**' option from the drop-down menu …



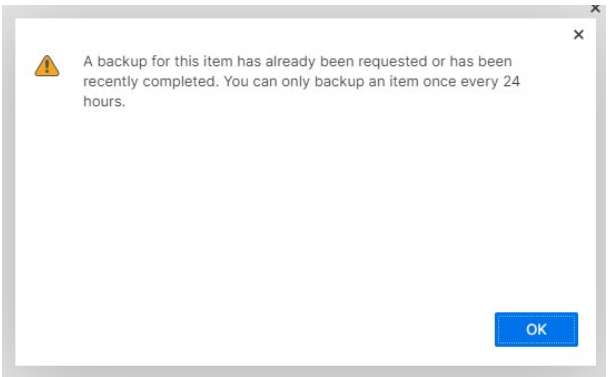
5. You will see the following pop-up window ….



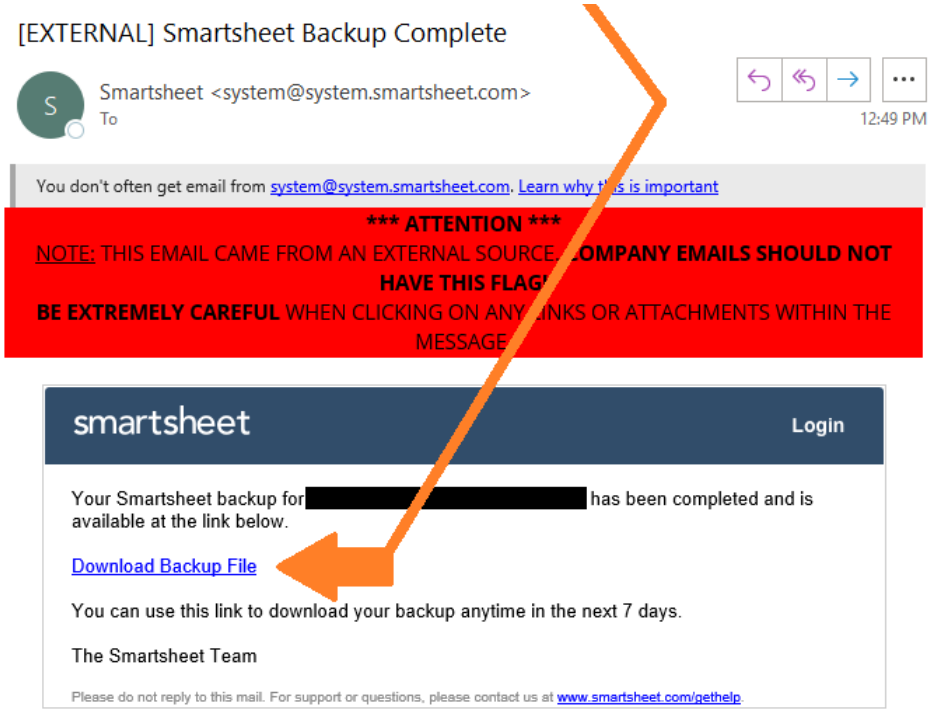
… and you will want to (1) check both option boxes and then (2) click **OK** to submit the backup …



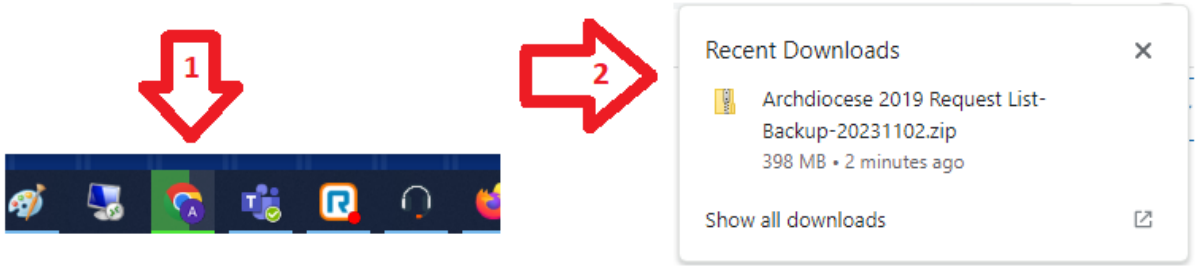
(<u>Note</u>: If a request for a backup of the sheet you have chosen has recently been made, you may see the following message and will need to wait 24 hours before requesting an additional backup)



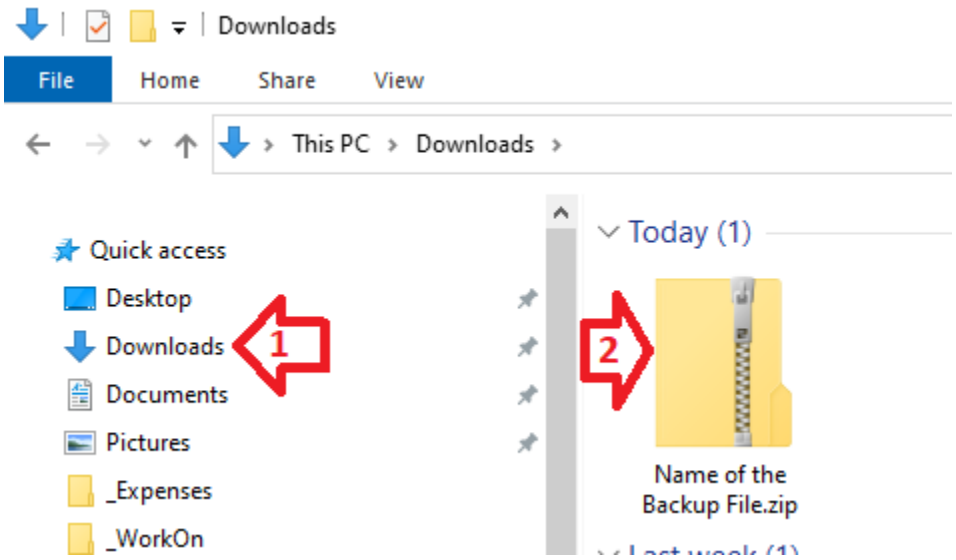
6. Normally within 15 minutes to an hour, you will receive an e-mail (similar to that shown below) that will contain a link to the backup file you have requested. Click on the **Download Backup File** link to start the download process ….



7. The download of the backup file will then take place *in the background*. You may notice your browser icon at the bottom of the screen (1) signifying the download is taking place followed by (2) a popup similar to that shown below - notifying you that the download is now complete and is in your default download folder …



8. Open Windows Explorer and (1) proceed to your Downloads folder where you should (2) see the zipped (i.e. compressed) backup file you requested …



9. Copy the backup to a safe place that you want to keep it for storage. If you need to open the .zip file to investigate or expand the contents of the backup, you can click the following link for additional information on how to decompress a .zip file: click here

6. References

A library of procedures such as this may be found at AOA IT Dept.'s Knowledgebase which can be accessed on the Helpdesk site at: https://help.archatl.com

7. Definitions

None.