smartsheet

Responsible AI at Smartsheet: How we protect your data

Policies, principles, and safeguards that keep your data secure

With groundbreaking technologies like AI, there are crucial questions around security and privacy that must be addressed. This whitepaper dives deep into the robust safeguards protecting your data that allow you to use Smartsheet AI capabilities with confidence.

At Smartsheet, our AI functionality streamlines complex tasks by enabling users to interact with their Smartsheet data conversationally, using natural language inputs, and empowering them to automate previously manual processes and workflows. To enhance the effectiveness of these features, a user's input may be enriched with extra context. For instance, the AI may utilize your sheet's specific column names to construct a responsive formula, designed to provide a more personalized output. For simplicity, we'll refer to all of this—inputs, including context, and outputs—as your AI Data.

Smartsheet considers your AI Data to be "Customer Content," as that term is defined in the Smartsheet User Agreement, or a similar term found in the agreement governing your access to and use of Smartsheet services. As between you and Smartsheet, you retain ownership over all of your Customer Content at all times. Smartsheet will process your AI Data in accordance with your instructions set forth in your agreement with Smartsheet.

Our commitment to responsible AI

At Smartsheet, we prioritize data protection and privacy. Our AI is designed with security and transparency in mind so that you can enjoy its benefits safely.

> ***Your data never mixes with other customers' data. It never trains third-party foundation models. It never leaves your control. Every AI action or recommendation can be explained, audited, and traced back to its source.***

Our AI features are built around four core principles:

Data Privacy & Security

- All AI features adhere to the same compliance standards that govern the broader Smartsheet platform, including SOC 2, GDPR, and data residency-related requirements. Data is encrypted in transit and at rest.
- Smartsheet AI features operate within your existing permission structures and respect all user permissions.
- We conduct comprehensive annual security reviews of all Smartsheet subprocessors to confirm that contractual security obligations are met. Additionally, Smartsheet maintains

industry-leading defense-in-depth strategies using a combination of people, process, and technology to protect our platform and customer data.
- The Smartsheet Trust Center details the latest information on security, compliance, privacy, and reliability across our products and services.

Accountability & Control

- Every AI action in Smartsheet is fully auditable. End users can review, evaluate, and approve AI-generated changes.
- Every AI feature prioritizes human-in-the-loop decision making, incorporating user checkpoints and approval steps to ensure full visibility and input.

Reliability & Fairness

- We continuously monitor AI response quality through automated monitoring, model testing, and direct user feedback to ensure consistent, trustworthy outcomes.
- Bias detection and ongoing model evaluation are built into our development process, and we leverage additional safeguards provided by our AI service partners to support reliability and robustness of AI outputs.

Transparency & Explainability

- When you're interacting with AI or AI-generated data in Smartsheet, you'll know it. We provide clear indications when an output is generated by AI, enabling users to review and validate results.
- Smartsheet is committed to providing visibility into how AI outputs are produced, including clearly explaining the data and logic used to arrive at a result.

AI tools at Smartsheet

In the following sections, we'll detail how the AI tools that are generally available today work and how they were developed.

Generally available Smartsheet AI tools

The AI tools available today include:
- Generate formulas
- Text and summaries
- Analyze data
- Intelligent form fill
- Workload risk in Resource Management
- AI-powered project setup for new users
- Suggested descriptions in Brandfolder

Smartsheet AI tools use **Azure OpenAI** and **Amazon Bedrock** as our AI model providers. The suggested descriptions tool in Brandfolder is powered by the Imagen model developed by Google Vertex AI.

Smartsheet AI features are available to customers depending on plan level. To learn more, visit our pricing page. Our AI tools respect customers' data residency selection. You can learn more about data residency in the Smartsheet Trust Center. Our AI tools are not currently available in Smartsheet Gov.

The models used to generate outputs in these tools are based on probability and may not always be accurate—especially in the case of complex requests or ambiguous images and data. The outputs generated can be reviewed and edited by you before you decide to apply them.

Users can optionally provide thumbs up or thumbs down feedback on the generated output as well as additional written feedback. The input, context, and resulting output will be included with any feedback provided. Please keep in mind that user provided feedback is NOT sent to the AI model and that all feedback is optional. You are not required to provide feedback in order to use our AI tools.

Smartsheet also collects usage data for service monitoring and quality control, including button clicks and the success or failure of outputs. You can learn more about the usage data we collect in our Trust Center.

Dataflow and transmission to third parties
When using Smartsheet AI tools, the following information is sent to the AI model hosted by the AI provider, as applicable:

- Input prompt entered by the user
- Customer context sent to the AI model as necessary, which could include but is not limited to: Current asset context, including column names, data types, allowed values for drop down columns, and cell data for referenced rows, if applicable; prior inputs and outputs from the active prompt history in order to allow a user to build upon or clarify prior inputs and outputs; user ID; context about the user and the user's account in order to answer questions such as "how many tasks are assigned to me" or "which tasks are due today"; context about the user's interactions in order to suggest contacts for sharing or collaboration.

Data storage, residency, and retention for Smartsheet AI tools

In order to provide quality service and support, input prompts and generated outputs are stored alongside sheet data in the Smartsheet database. This follows our SOC2 policies with industry standard AES 256-bit encryption at rest and accessed via TLS v1.2 encrypted connections. This data is only accessed or analyzed when necessary to provide the Smartsheet offering and support or when associated feedback is submitted. You can learn more about our secure data storage and retention here.

Input prompts and generated outputs are not stored by our AI providers beyond what is necessary to generate a response, and our enterprise contracts with AI providers include explicit prohibitions on using customer data for model training purposes. Smartsheet may retain the input prompt and generated output to enable AI experiences and for support and abuse monitoring. Authorized Smartsheet employees may review input prompts and generated outputs should they trigger content filters indicating potential abusive content or violation of Smartsheet's Acceptable Use Policy. Smartsheet reserves the right to review input prompts, reach out to the applicable user via support, and even block the user from AI features should abuse be detected. Input prompts and generated outputs are deleted by Smartsheet within 180 days of termination or expiration of a customer's contract term, as described in the Smartsheet User Agreement.

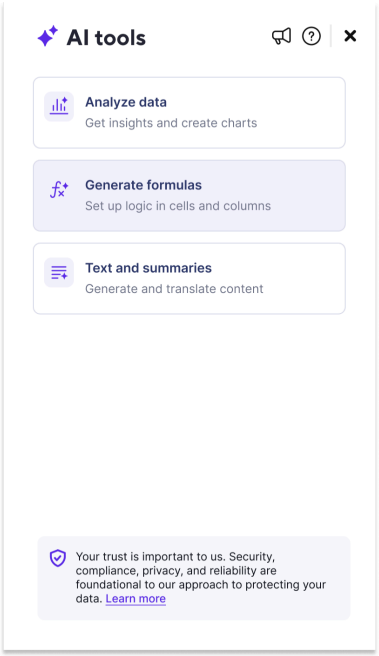
Generate formulas

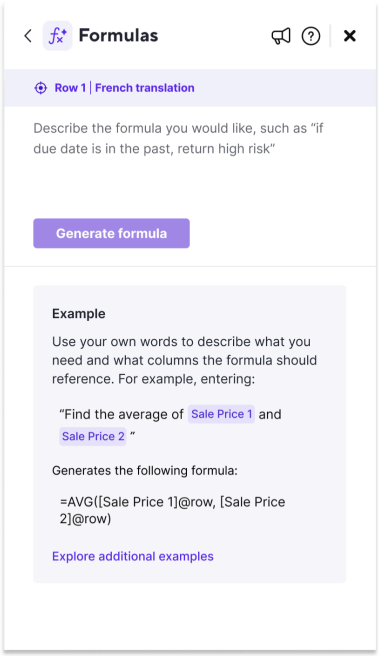
What is the generate formulas AI tool

With the generate formulas tool, you can create powerful formulas to process, calculate, or extract information from your sheet by simply describing what you want the formula to do. You can easily reference columns using the autocomplete feature. Once generated, the formula behaves like a normal formula including the ability to manually convert it to a column formula.

How should I use the generate formulas AI tool

From within a sheet, open the AI tools panel from the right rail and select the generate formulas AI tool. Describe the formula you need, use autocomplete to reference columns, then generate and preview the output along with an explanation of its creation. You can then either apply the output to the currently selected cell(s) or modify the input to generate a different output.





Dataflow and transmission to third parties

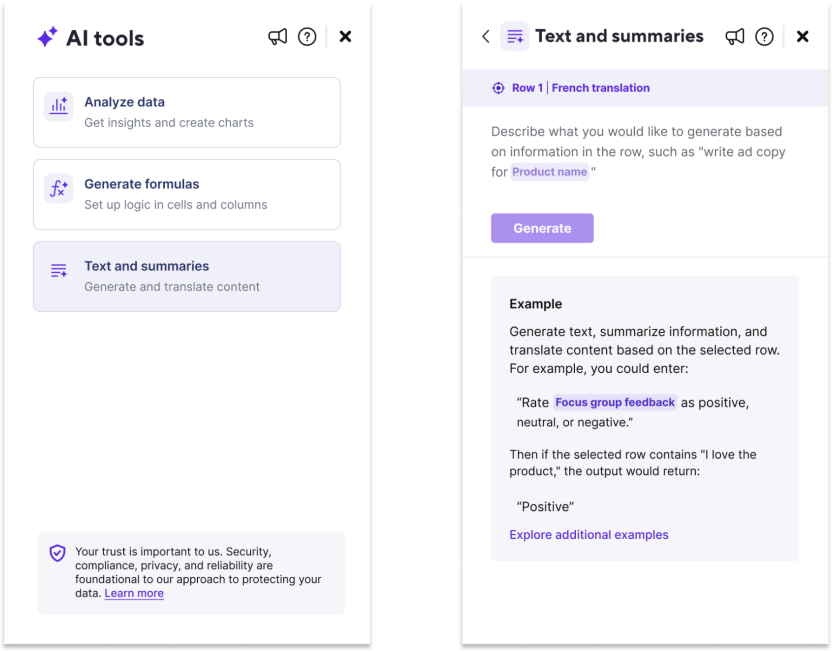
When generating formulas, the following information is sent to the AI model hosted by Azure OpenAI:

- Input prompt entered by the user
- Context for the sheet: relevant column names and data types

Text and summaries

What is the text and summaries AI tool

With the text and summaries tool, you can process row content or generate all-new row content using generative AI, and store it directly in a cell in the sheet. All you need to do is describe what you want while also passing in references to other cells for the same row.



How should I use the text and summaries AI tool

From within a sheet, open the AI tools panel from the right rail and select the text and summaries tool. Describe the text you need, use autocomplete to reference columns, then generate and preview the output along with an explanation of its creation. You can then either apply the output to the currently selected cell(s) or modify the input to generate a different output.

Dataflow and transmission to third parties

When generating text and summaries the following information is sent to the AI model hosted by Azure OpenAI:

- Input prompt entered by the user
- Context for the sheet: column names, data types, and cell data for referenced rows
    - *For example, if translating text contained in a referenced cell, the contents of that cell are provided with the prompt so that the text can be translated*

Analyze data

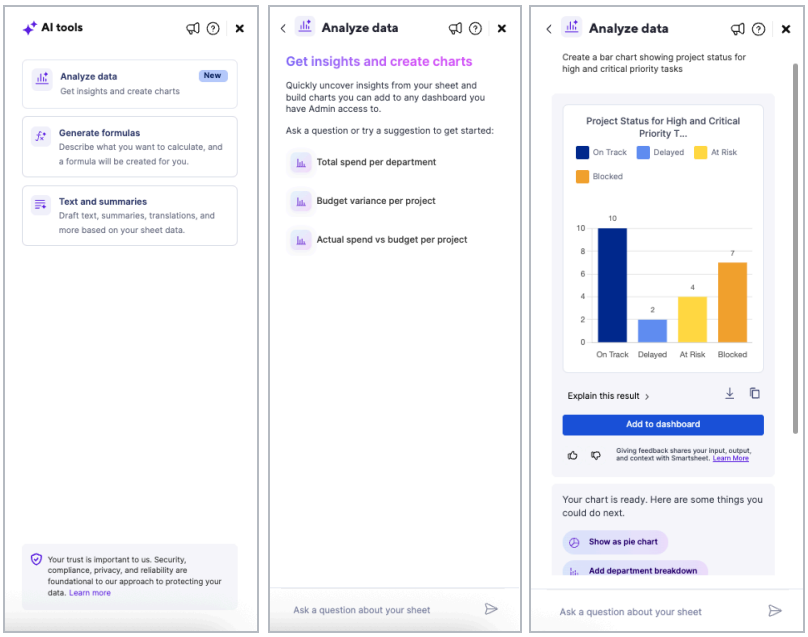
What is the analyze data AI tool

Analyze data is a quick way to generate charts or aggregated metrics based on content in your sheet by asking a question in plain language. It is a conversational experience where you can type in a question or a prompt, receive answers and refine the results or ask follow up questions. This tool is designed to understand your question, ask clarifying questions if needed, perform the specified calculations and filter on the content in the sheet, and create an appropriate visual for the result such as a metric or chart. Charts can be added to a dashboard for real-time insight into your projects.

How should I use the analyze data AI tool

From within a sheet, a user can open the AI tools panel from the right rail and select the analyze data tool. Describe your data question or chart requirements and the answer will be generated for you. If you want to know how the result was determined, you can open up the explanation and read the steps that were

taken. You can ask follow up questions on the generated results, or refine your prompt to see a different output. Click the 'Add to dashboard' button to add the chart widget to a new or existing dashboard.



Dataflow and transmission to third parties

When using analyze data, the following information is sent to the AI model hosted by Azure OpenAI:

- Input prompt entered by the user
- Context for the sheet—column names, data types, allowed values for drop down columns, and the following:
    - Cell data for a few rows (currently top 5 rows) in the sheet to provide sample data to the AI model
    - Prior inputs and outputs from the active analyze data prompt history in order to allow a user to build upon or clarify prior inputs and outputs
    - Context about the user and the user's account in order to answer questions such as "how many tasks are assigned to me" or "which tasks are due today"

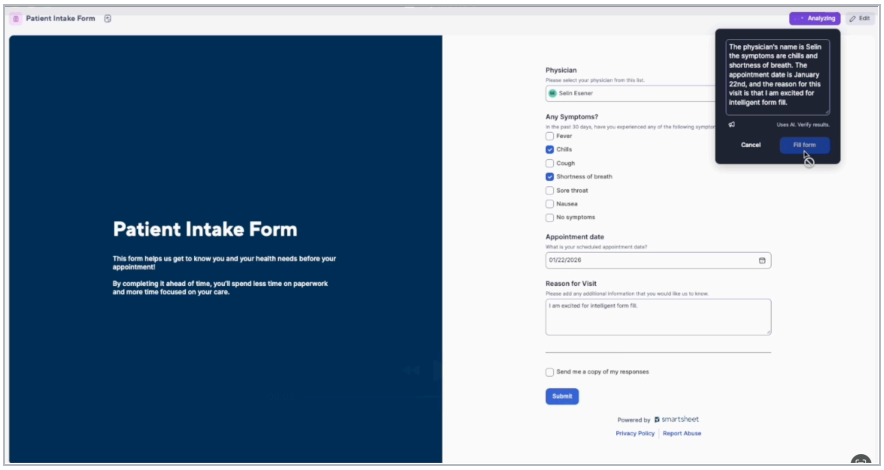
Intelligent form fill

What is intelligent form fill

Intelligent form fill lets you complete forms quickly and accurately using voice. Instead of filling out fields one by one, you can speak your responses in plain language, and AI automatically maps your input to the correct fields across the entire form. You can review, edit, and refine responses before submitting, making form completion faster and easier.

How should I use intelligent form fill

From within a form, open intelligent form fill and describe the information you want to capture by speaking. The tool will interpret your input and populate the relevant fields for you. You can make edits, ask follow-up prompts to adjust specific details, or rephrase your input to update the form.



Dataflow and transmission to third parties

When using intelligent form fill, the following information is securely sent to the transcription service and AI model hosted by Amazon Bedrock for field extractions:

- The user's input into the intelligent form fill panel (typed or spoken)
- Form context, including field names, field types, and allowed values (such as dropdown options)
- Limited form structure and sample context required to accurately map responses to form fields
- Any user refinements and follow-up prompts
- User and account context, when necessary, to support requests such as "assigned to me" or "today's date"

Workload risk in Resource Management

What is workload risk in Resource Management

Workload risk is an AI-powered monitoring tool within Smartsheet Resource Management that automatically analyzes resource allocation across projects and identifies potential risks. It continuously evaluates team workload distribution, highlighting resources that are over-allocated or under-allocated within a specified time period. The tool generates a summary showing overall team efficiency, identifies specific resources at risk, and provides the number of projects and tasks contributing to the imbalance. This allows project and resource managers to quickly understand resource constraints without manually compiling reports or analyzing utilization data across multiple projects.

How should I use workload risk

From a Smartsheet application, open Resource Management from the left rail and select the RM Project. The project brief page displays the workload risk panel on the right panel where your team's current efficiency percentage displays and allows you to select a time period to analyze (such as the next 30 days). View expandable sections showing over-allocated and under-allocated resources, with each resource displaying their utilization percentage, number of projects, and task count. Click on "Suggested Actions" to see AI-generated recommendations for rebalancing workloads. The summary refreshes automatically as project data changes, giving real-time visibility into workload risks across your portfolio.

Dataflow and transmission to third parties

When using workload risk, the following information is sent to the AI model hosted by Amazon Bedrock:

- Time period selected by the user (e.g., "Next 30 Days")

- Resource allocation data including resource IDs, utilization percentages, number of assigned projects, and task counts
- Project IDs and associated metadata for projects within the selected time period
- Team efficiency metrics and capacity information
- User IDs to ensure appropriate data access and relevant recommendations

AI-powered project setup for new users

What is AI-powered project setup for new users
The AI-powered project setup experience guides new users through creation of their first project in Smartsheet with personalized suggestions based on their goals.

How should I use AI-powered project setup
When prompted, users can choose to input their project goals in natural language to generate a workspace in Smartsheet tailored to their work.

Dataflow and transmission to third parties
When using the AI-powered project setup experience, the following information is sent to the AI model hosted by Amazon Bedrock:

- Input prompt entered by the user
- User inputs such as company size, work type/work category, and specific use cases selected by the user within the guided experience (e.g. “Track KPIs” or “Manage a project”)

In-app support

In-app support is available from anywhere in Smartsheet by clicking the Help icon and clicking “Chat with support” to open the Smartsheet Support Agent chat panel. Users can receive instant AI-driven solutions and utilize their support plan benefits—such as Pro Desk sessions, phone support, or connecting with a live agent—all within a single window.

Dataflow and transmission to third parties
In-app support is powered by Salesforce Service Cloud and Service Agent. When using the in-app support chat panel within Smartsheet, Salesforce Service Agent is used to provide AI-generated/summarized support responses to customers utilizing our extensive Smartsheet knowledge base, before connecting the user with a live Support Agent (if applicable).

Please note that Salesforce Service Agent does not have access to your sheet data so it cannot provide sheet-specific information when formulating responses. Salesforce Service Agent uses input prompts entered by the user to generate a response, as well as prior inputs and outputs from the current active chat history in order to allow a user to build upon or clarify prior inputs and outputs.

More information on Salesforce’s secure AI infrastructure, including information about data storage, residency, and retention, is available here.

Suggested descriptions for images in Brandfolder

What is the suggested descriptions tool
Suggested descriptions empower users to quickly add valuable description metadata to images in Brandfolder. Leveraging AI to understand images, the suggested descriptions tool produces text that can

describe the content of an image. In addition to streamlining content curation workflows, these descriptions are searchable, giving users greater flexibility in how they find and discover content in Brandfolder. The suggested descriptions tool is powered by the Imagen model developed by Google Vertex AI.

How should I use the suggested descriptions tool
When editing the image description for images in Brandfolder, you will see a link to suggest a description in the upper right corner of the description text box. Clicking the suggest description link will generate a description of the image. The descriptions generated can be reviewed and edited by the user before they are accepted and stored along with other metadata for the image.

Dataflow and transmission to third parties
When a description is requested for an image, that image is base64-encoded, sent within Google Cloud Platform to the Imagen captioning model, which is hosted on Google Vertex AI. The requests are transmitted over a TLS v1.2+ secure connection to the AI model. The only output from the model is the description itself. Neither the image nor the suggested description is used to train the Google Vertex AI model.

Data storage, residency, and retention for Brandfolder AI tools

Suggested descriptions is built on top of the underlying Brandfolder platform. You can learn more about how data is stored securely in Brandfolder here. The input image and generated output are not stored by the model for longer than necessary to generate the output and are not used to train the model.

Secure development of AI tools

All product features, including but not limited to Smartsheet code, AI, open source, and subprocessors, fall within and follow Smartsheet SDLC, which includes security reviews and security testing. New features, AI, and subprocessors undergo security review prior to being introduced into the Smartsheet platform and infrastructure. Security testing includes continuous SAST, DAST, and penetration testing. The testing process is configured to detect code vulnerabilities prior to code being introduced into the environment and code base. As vulnerabilities are identified, Smartsheet Security works with internal teams, vendors, and subprocessors to remediate identified issues.

ISO/IEC 42001 (AI Management — *In Progress*): We are currently pursuing this certification to establish a formal Management System for Artificial Intelligence, ensuring our AI-driven features are developed and deployed ethically and securely.

Additional resources

We are adding groundbreaking AI technology to the Smartsheet platform to help new and advanced users get even more out of the platform while maintaining our enterprise grade security standards. To learn more about Smartsheet security capabilities, programs, and protections, visit: smartsheet.com/trust.