smartsheet

Smartsheet AI tools offer transparent and secure data use

Smartsheet prioritizes data privacy and security while boosting productivity with generative AI

This whitepaper relates to the Smartsheet platform features powered by AI. The intent of this whitepaper is to be transparent on how we use public models and responsibly protect data.

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 AI Data that allow you to use Smartsheet AI tools with confidence.

At Smartsheet, our AI functionality streamlines complex tasks by transforming natural user inputs, like a simple sentence or an image, into outputs such as formulas and descriptions. To enhance the effectiveness of these tools, a user's input may be enriched with extra context. For instance, the AI utilizes 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.

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.

Our AI features are built around the following core principles:

Responsibility
- Security and privacy are fundamental to everything we do. The Smartsheet Trust Center details the latest information on the security, compliance, privacy, and reliability of our products and service.

Transparency
- We do not own your AI Data and do not use it to train models. We think this is incredibly important so we're going to repeat it: *We do not use your AI Data to train models.*
- The Smartsheet Privacy Notice describes how we collect, use, and share personal data and explains your related rights and choices.
- We indicate to end users when an output is generated by AI so they are aware and can make an informed decision about how to use the output.

Security
- We conduct comprehensive annual security reviews of all Smartsheet subprocessors to confirm that contractual security obligations are still being met.
- Smartsheet maintains industry-leading defense-in-depth strategies using a combination of people, process, and technology to protect our platform and customer data. Our cybersecurity program focuses on safeguarding the confidentiality, integrity, and availability of the service.

Empowerment
- Smartsheet AI tools are exactly that - tools. You have the power to accept, refine, or reject the AI outputs as needed to help achieve your goals.
- Whether on our AI tools or other features in our platform, we empower all users to help shape the future by providing feedback. Providing feedback is always optional.

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.

What are Smartsheet AI tools

The AI tools available today are:
- Generate formulas
- Text and summaries
- Analyze data
- Get help
- Suggested descriptions

These AI tools use **Azure OpenAI** as our Large Language Model (LLM) provider. You can learn more about Azure Open AI here.

The generate formulas, text and summaries, and analyze data AI tools are only available to Enterprise plan licensed users in the US and EU regions. The get help AI tool is available to all Smartsheet users in the US and EU regions. The suggested descriptions AI tool is available to customers on all Brandfolder plans. Our AI tools respect users' 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 accept them.

The user 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.

Data is ONLY sent to the AI model when a user explicitly enters a prompt and submits it. NO data is shared with the AI model by simply having these features enabled or opening the AI tools panel.
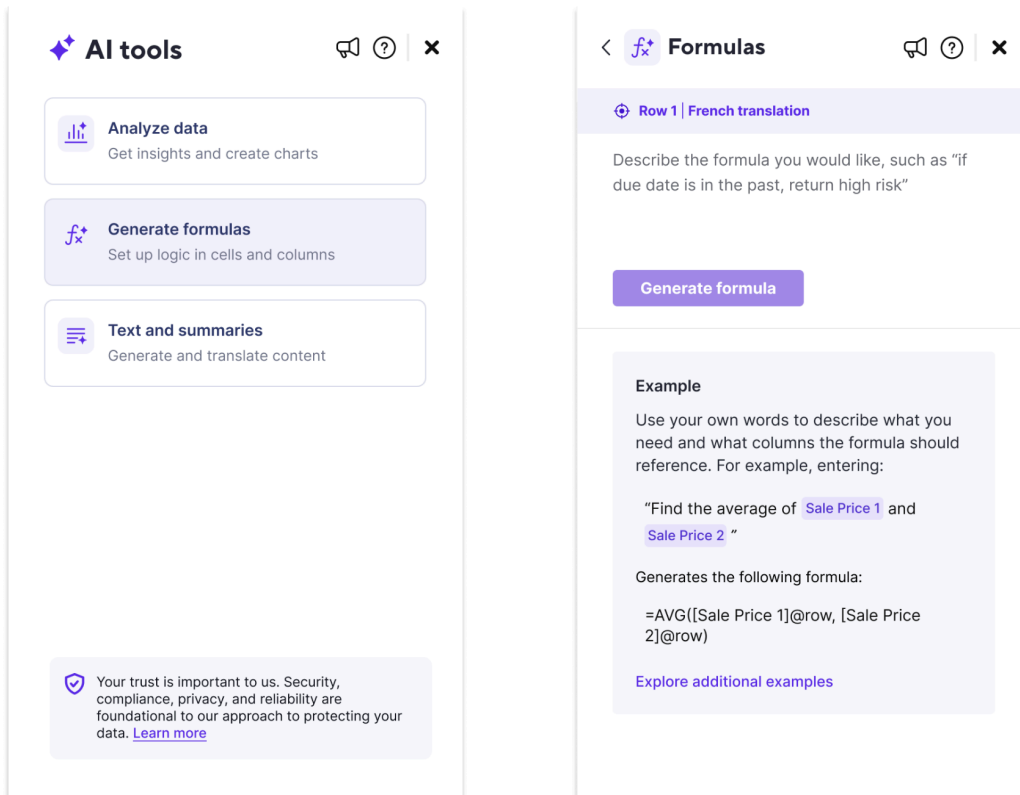
Generate formulas

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.
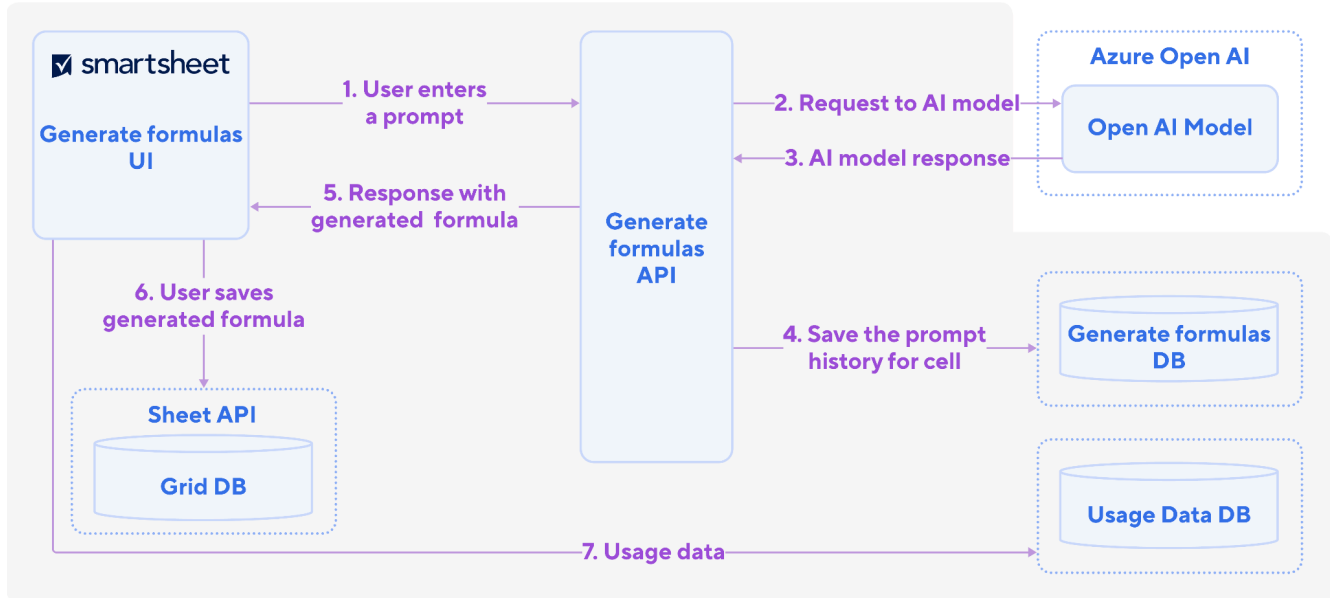

Dataflow and transmission to third parties

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

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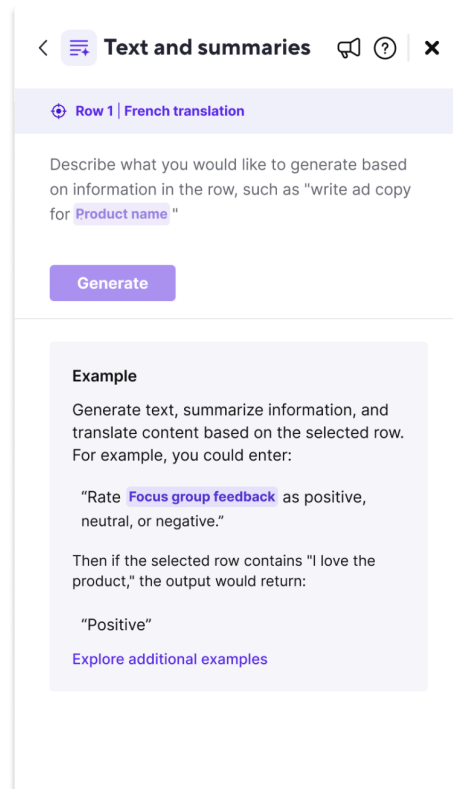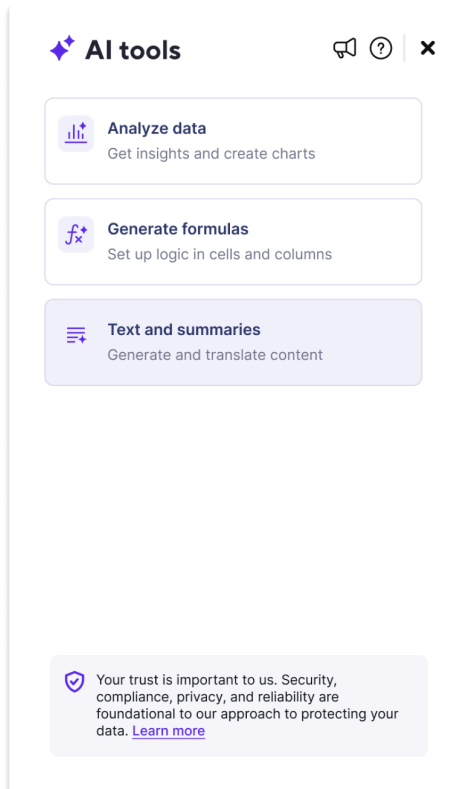- Context for the sheet - relevant column names and data types

The following diagram is an example of the flow of data for the generate formulas AI tool through Smartsheet systems and, where relevant, to third-party models:

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Generate formulas UI

1. User enters a prompt

Generate formulas API

2. Request to AI model

3. AI model response

Azure Open AI

Open AI Model

5. Response with generated formula

6. User saves generated formula

4. Save the prompt history for cell

Generate formulas DB

Sheet API

Grid DB

7. Usage data

Usage Data DB

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.

AI tools

Analyze data
Get insights and create charts

Generate formulas
Set up logic in cells and columns

Text and summaries
Generate and translate content

Your trust is important to us. Security, compliance, privacy, and reliability are foundational to our approach to protecting your data. Learn more

Text and summaries

Row 1 | French translation

Describe what you would like to generate based on information in the row, such as "write ad copy for Product name "

Generate

Example

Generate text, summarize information, and translate content based on the selected row. For example, you could enter:

"Rate Focus group feedback as positive, neutral, or negative."

Then if the selected row contains "I love the product," the output would return:

"Positive"

Explore additional examples

*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*

The following diagram is an example of the flow of data for the text and summaries AI tool through Smartsheet systems and, where relevant, to third-party models:
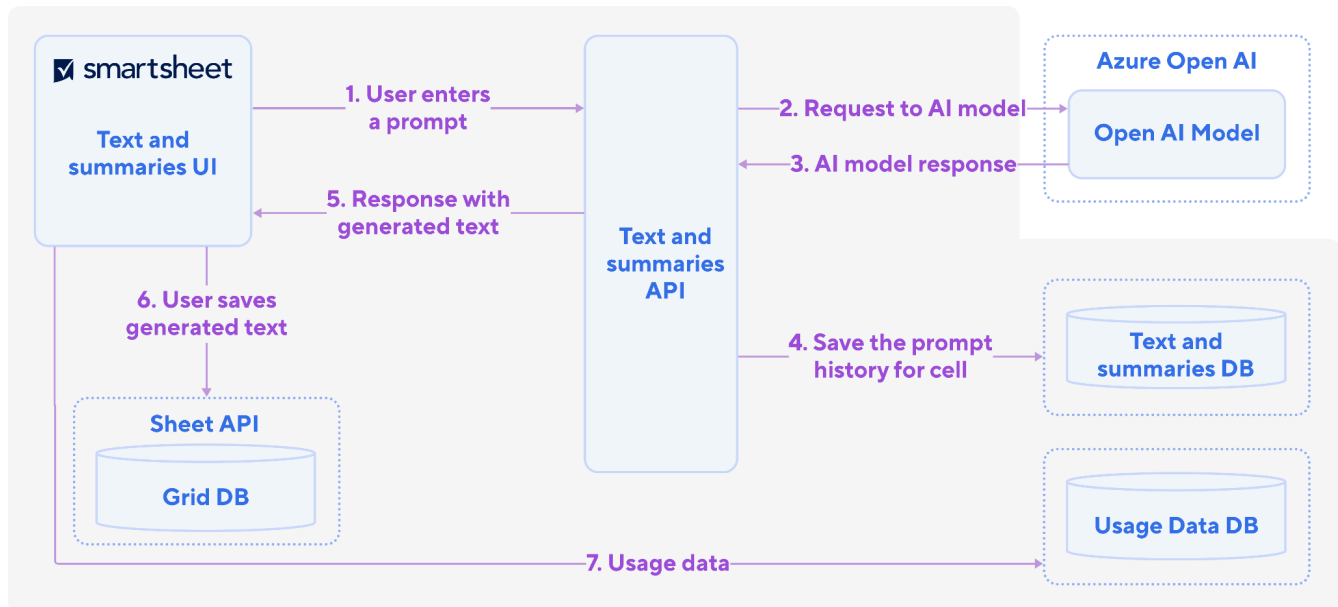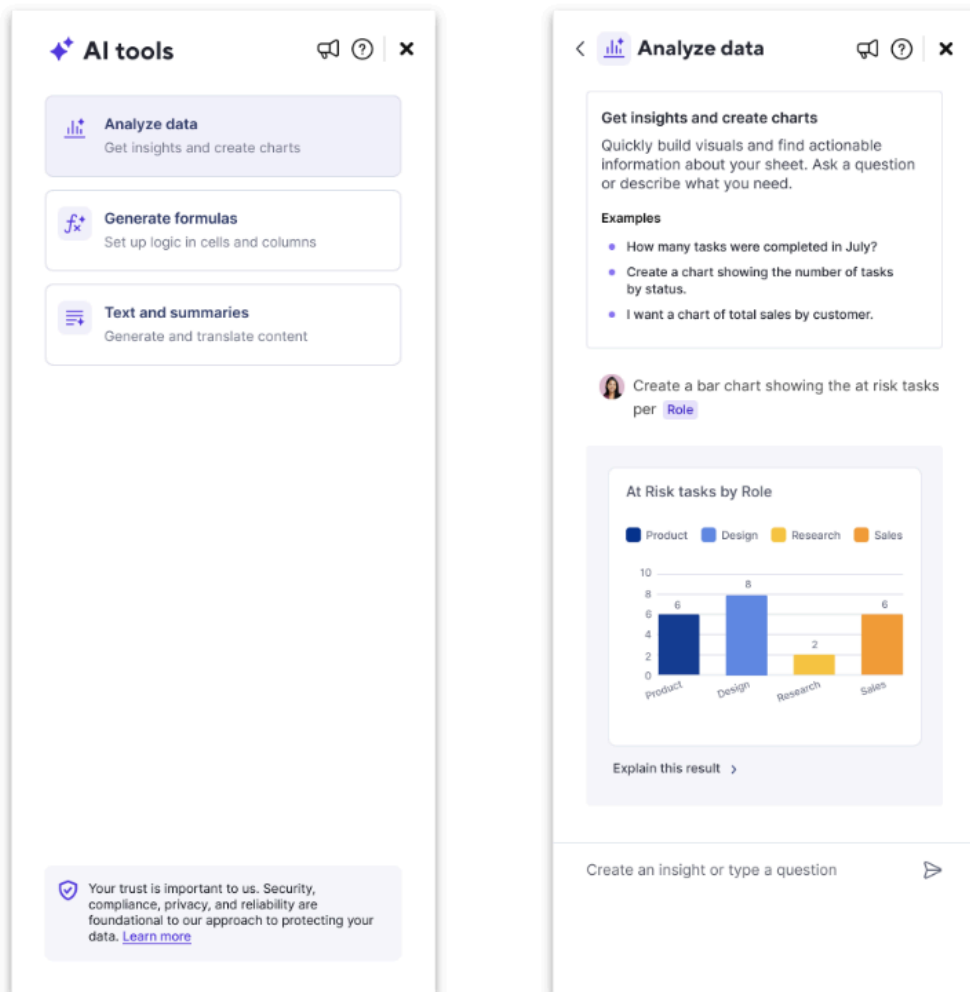

Analyze data

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 chart or a metric.

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.


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"

The following diagram is an example of the flow of data for the analyze data tool through Smartsheet systems and, where relevant, to third-party models:
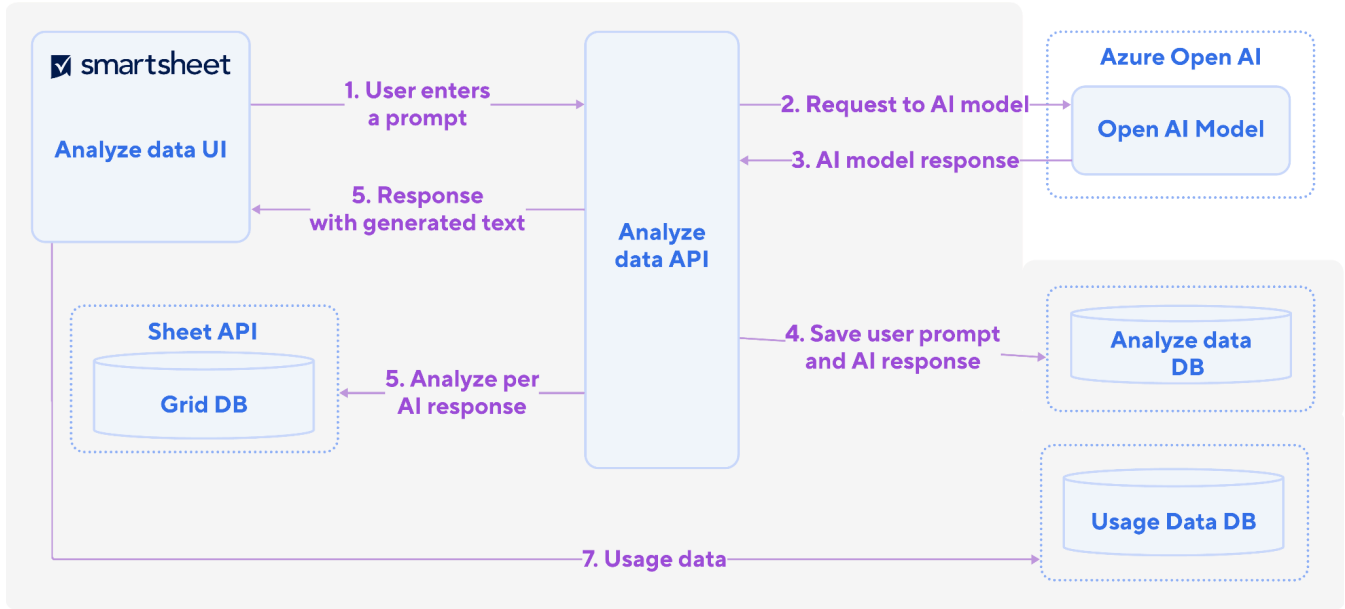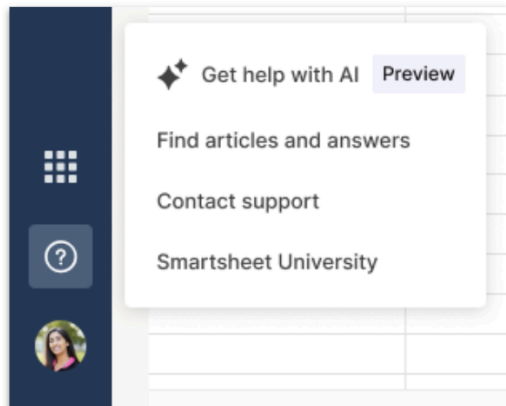
Get help

What is the get help AI tool
The get help tool is designed to provide answers to your Smartsheet-related queries, empowering you to overcome obstacles and accelerate the development of your solutions. Whether you need to understand Smartsheet capabilities, learn how to construct a specific solution, clarify the meaning of a feature, or troubleshoot a formula, get help is here to assist you. Simply pose your Smartsheet-related question, and get help will furnish you with a relevant answer, enabling you to focus your efforts on more crucial tasks.

How should I use the get help AI tool
Get help accepts your queries in natural language and utilizes our extensive Smartsheet knowledge base to generate relevant answers. To access the get help tool, open the Help menu (via the ? icon) in the left navigation rail above the profile icon at the bottom, and click "Get help with AI" to open the get help panel. Enter your query in the provided field. Please note that get help does not have access to your sheet data (nor is such data sent to the AI) so it cannot provide sheet specific information when formulating responses.

Dataflow and transmission to third parties
When using the get help AI tool, the following information is sent to the AI model hosted by Azure OpenAI:

- Input prompt entered by the user
- Prior inputs and outputs from the active get help prompt history in order to allow a user to build upon or clarify prior inputs and outputs.

The following diagram is an example of the flow of data for the get help tool through Smartsheet systems and, where relevant, to third-party models:
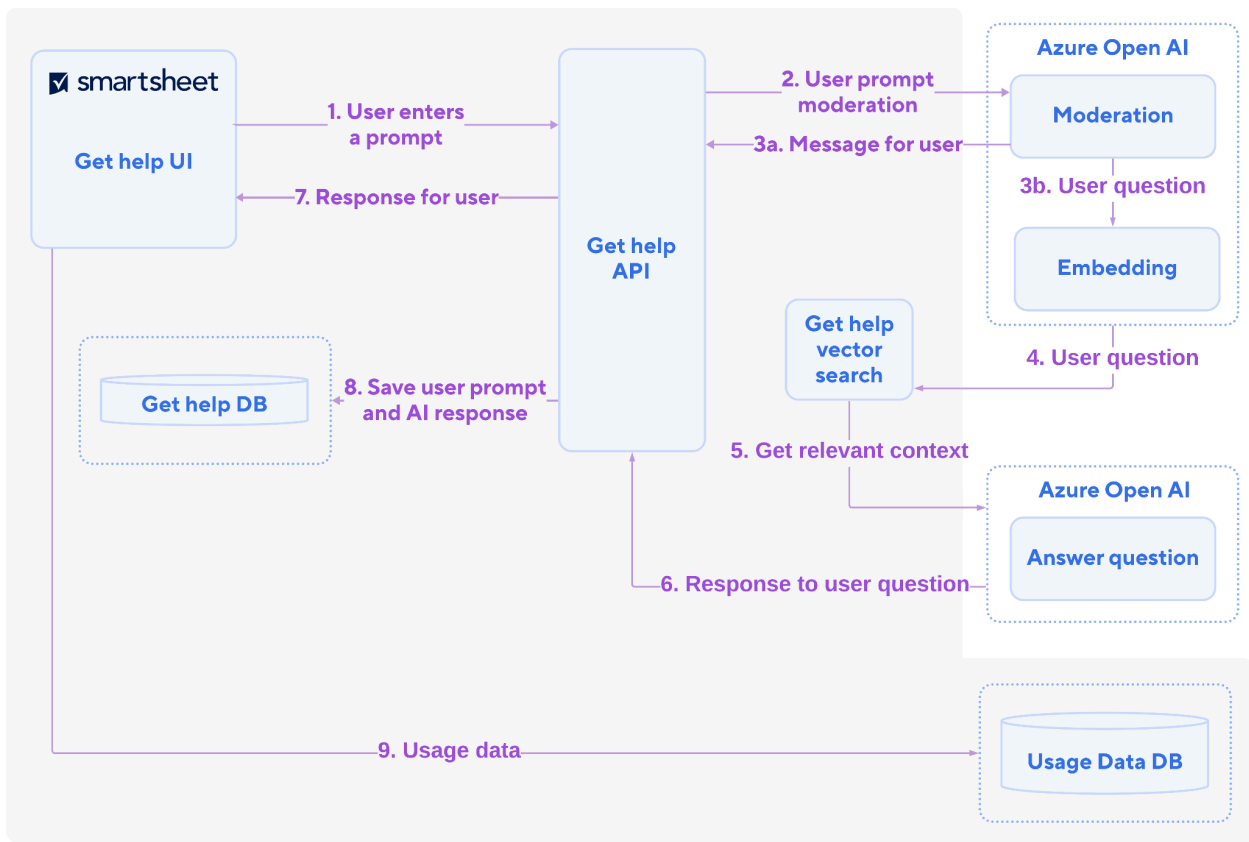
Data storage, residency, and retention for Smartsheet AI tools

In order to provide quality service and support, input prompt and generated output data is 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.

The input prompt and generated output are also temporarily stored by the Azure OpenAI Service only for support and abuse monitoring, *not* to train the Azure AI model. This data is automatically deleted after 30 days. Additionally, Smartsheet persists the input prompt and generated output for support and abuse monitoring, *not* to train any AI model. It is automatically deleted after 180 days.

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. You can learn more about Google Vertex AI [here](#).

***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.
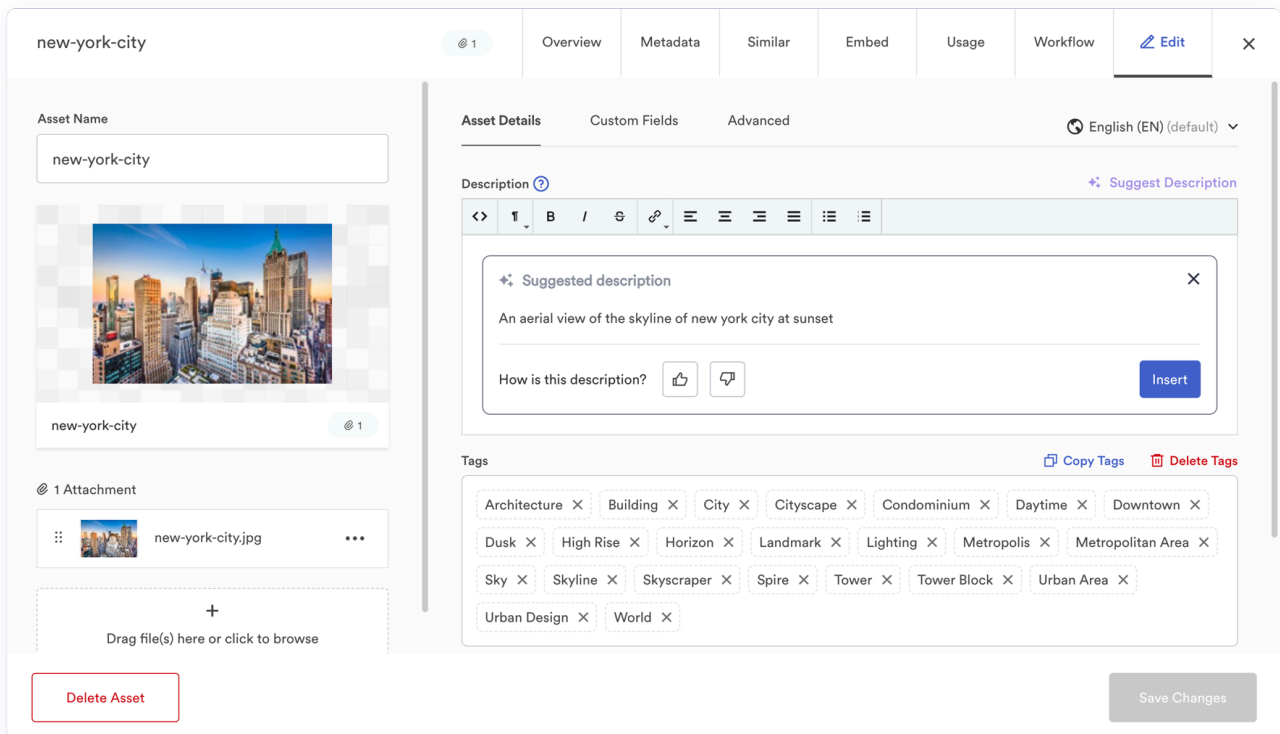
Dataflow and transmission to third parties

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](#).

The following diagram is an example of the flow of data for suggested descriptions through Brandfolder systems and, where relevant, to third-party models:
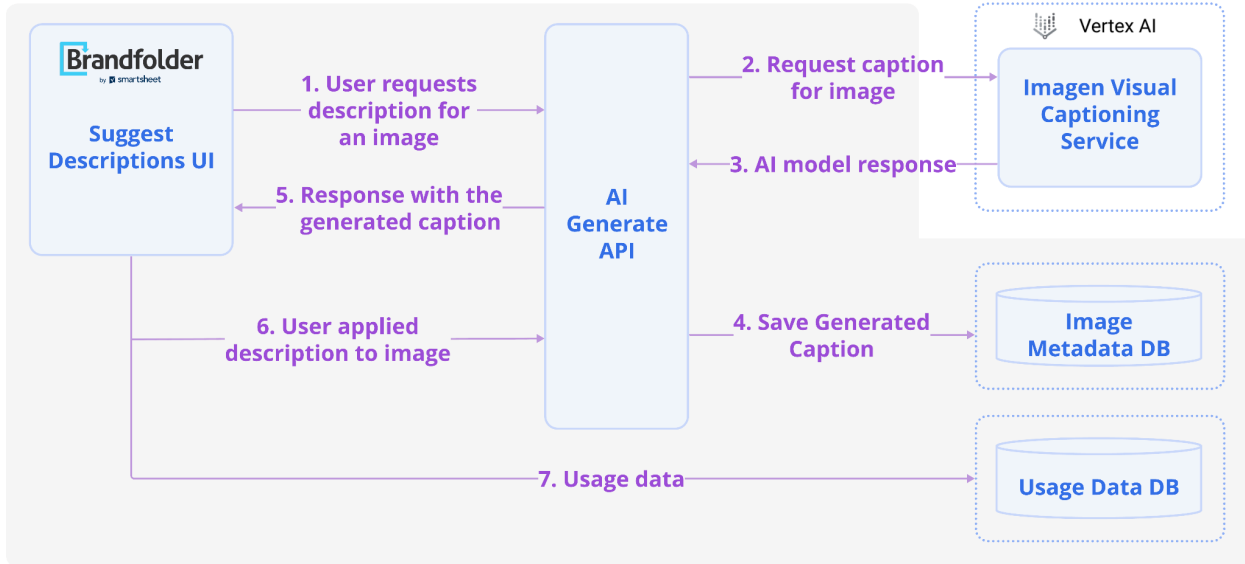
Data storage, residency, and retention for Brandfolder AI tools

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.

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.