

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. Additional AI tools may become generally available as we continue to make advancements to empower anyone to drive meaningful change. The intent of this whitepaper is to be transparent about exactly 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 AI responsibly within Smartsheet.

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 public models. We think this is incredibly important so we're going to repeat it: *We do not use your AI Data to train public models.*
- The Smartsheet [Privacy Notice](#) describes how we collect, use, and share personal data and explain 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's 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.

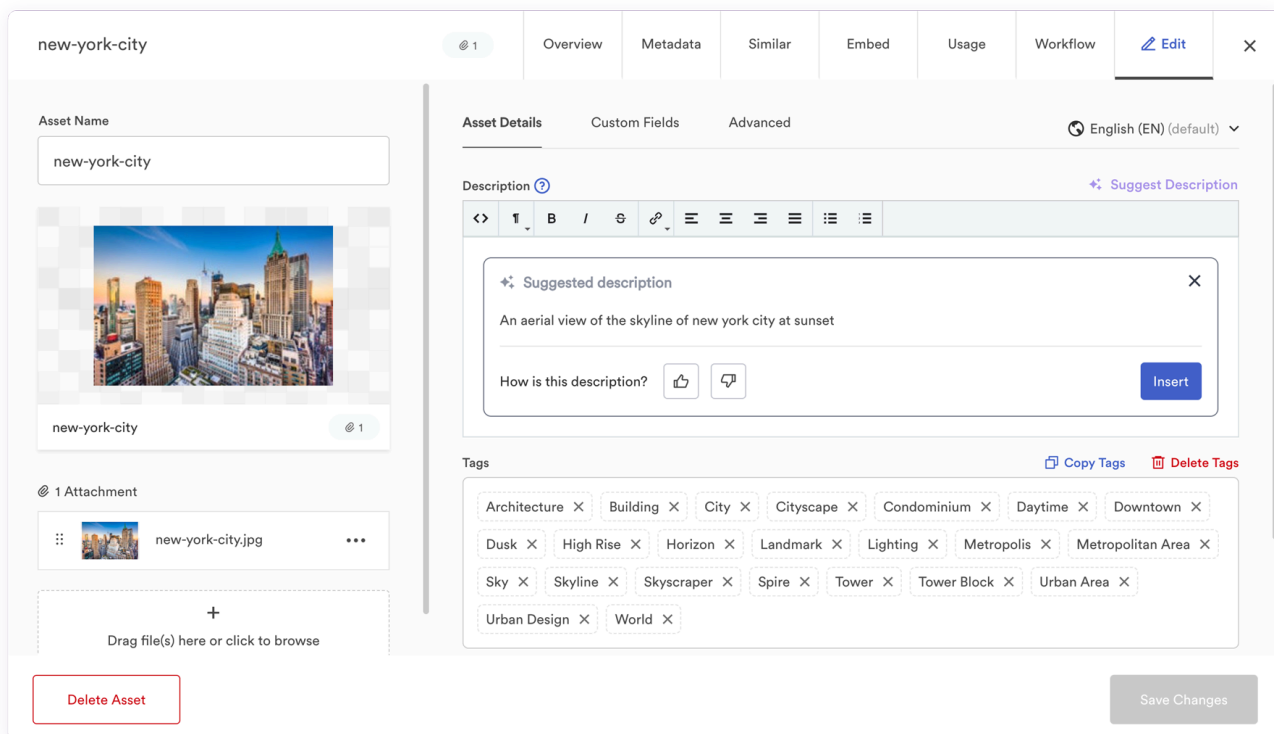
AI tools in Smartsheet

In the following sections, we'll detail how the specific AI tools that are generally available today work and how they were developed. As new tools become available, we will follow the same approach. The models used to generate outputs in these tools are based on probability and may not always be accurate - especially in case of complex requests or ambiguous images and data. The outputs generated can be reviewed and edited by you before you accept them. The AI tools available today are:

- Suggested descriptions
- Generate formulas
- Text and summaries

Suggested descriptions are available to customers on all plans for Brandfolder. Generate formulas, text and summaries are available to Smartsheet customers in the US and EU regions on the Enterprise plan. 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.

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](#).

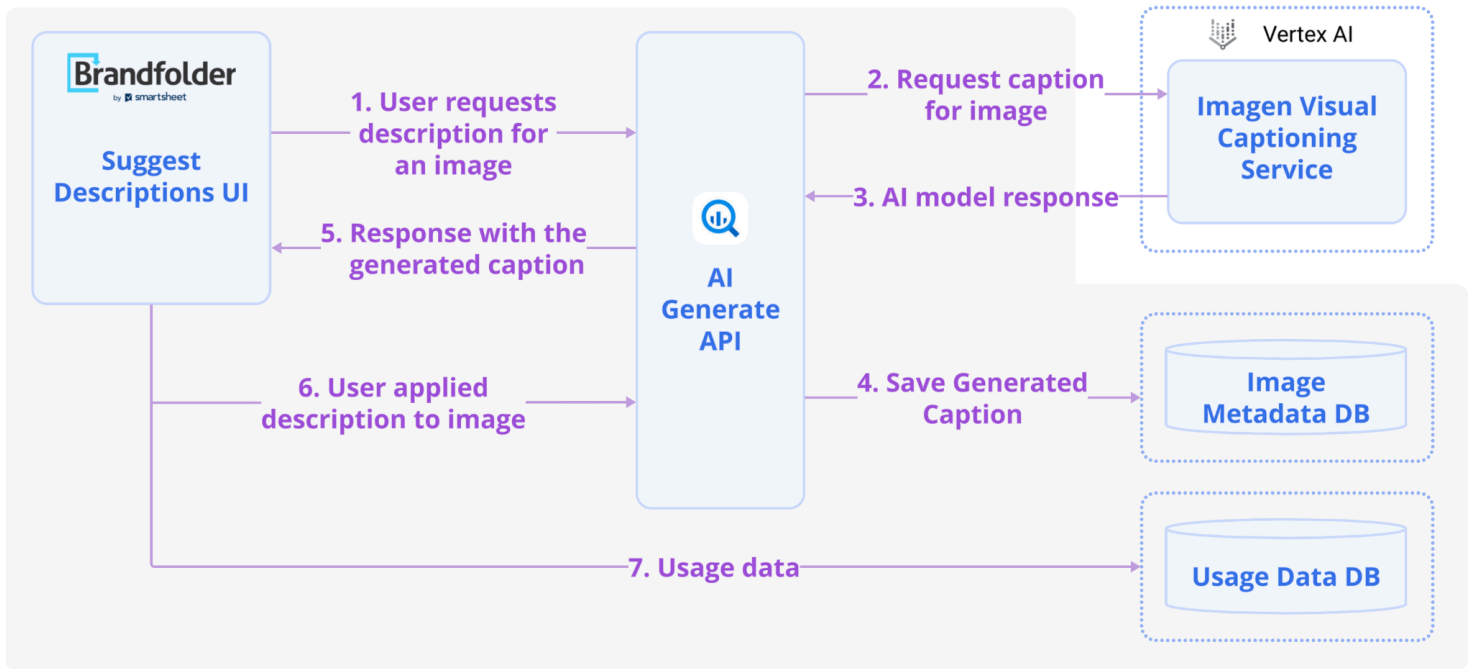
The user can optionally provide thumbs up or thumbs down feedback on the description. Smartsheet collects feedback responses and acceptance rate of generated description. This data enables us to assess user satisfaction and gain insights into the usefulness and relevance of the generated output. These analytics on the generated output and user edits help in evaluating the model performance. Please keep in mind that user provided feedback is NOT sent to the model and that all feedback is optional. You are not required to provide feedback in order to use our AI tools. We also collect usage data for service monitoring and quality control, including link clicks and the success or failure of outputs.

In the context of Suggested descriptions, data is ONLY sent to the model when a user explicitly requests a suggested description. NO data is shared with the model by simply having this feature enabled. You can learn more about the usage data we collect in our [Trust Center](#).

Data storage, residency, and retention

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.

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



Generate Formulas and Text and Summaries

AI tools 🔊 ? ✕

f_x 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](#)

< f_x Formulas 🔊 ? ✕

📍 Row 1 | Column 4

Describe the formula you would like, such as "if due date is in the past, return high risk"

Generate formula

Example

Use your own words to describe what you need and what columns the formula should reference. For example, entering:

"Find the average of [Sale Price 1](#) and [Sale Price 2](#) "

Generates the following formula:

=AVG([[Sale Price 1](#)]@row, [[Sale Price 2](#)]@row)

[Explore additional examples](#)

< ☰ Text and summaries 🔊 ? ✕

📍 Row 1 | Column 4

Describe the text output you would like, such as "summarize this row in under 100 characters".

Generate

Example

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

"Translate [Item description](#) to German"
Where [Item description](#) contains "this is a description of an item in a spreadsheet"

Generates the following:

Dies ist eine Beschreibung eines Elements in einer Tabelle

[Explore additional examples](#)

What are the generate formulas and text and summaries tools

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.

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.

Both the generate formulas and text and summaries tools are powered by large language models (LLMs) built by **Azure OpenAI**. You can learn more about Azure Open AI [here](#).

How should I use the Generate Formulas and Text and Summaries Tools

These tools enable you to use natural language to generate formulas or text information and use them within sheets. From within a sheet, open the AI tools panel from the right rail and select either formulas or text and summaries. Describe the formula or 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 formulas, text, or 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 and data types
 - Cell data for referenced rows is also sent for the text and summaries tool
 - *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*
 - *For generate formulas, cell data/values are NOT included*

The user can optionally provide thumbs up or thumbs down feedback on the generated output as well as additional written feedback. The relevant 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](#).

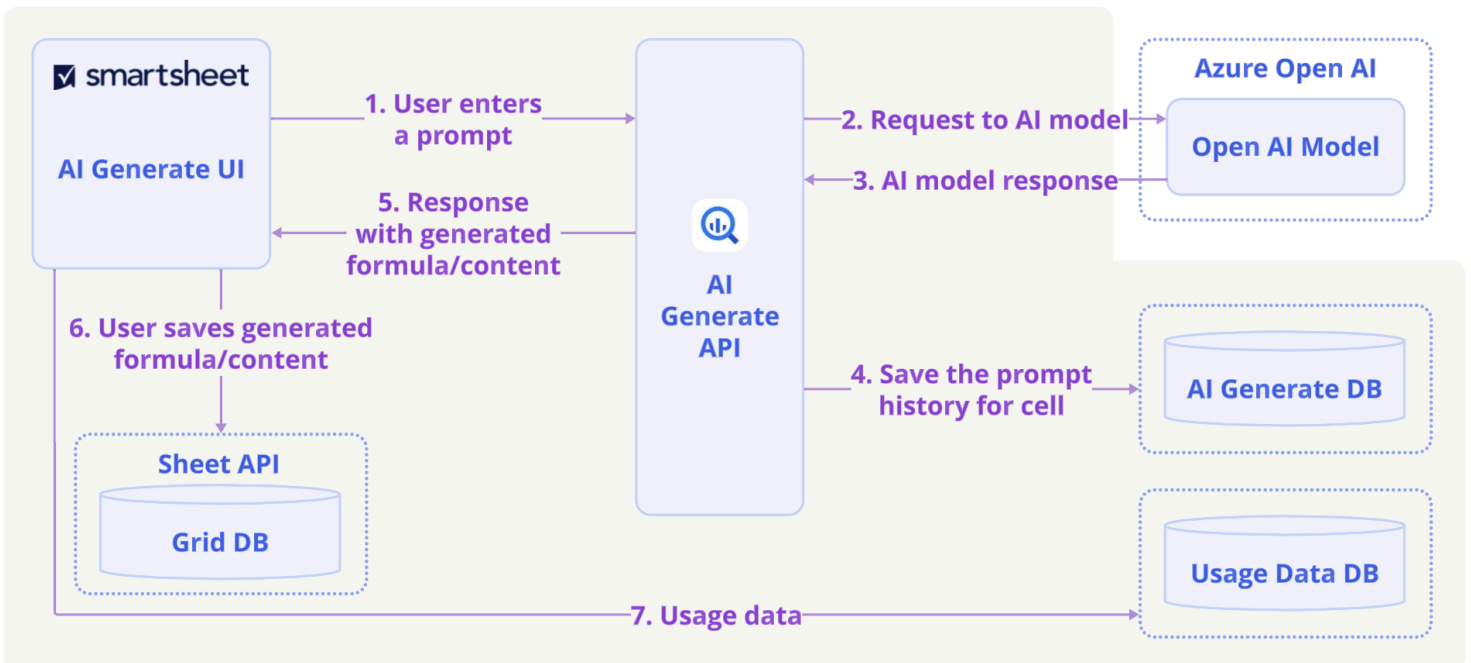
For the generate formulas and generate text and summaries AI tools, data is ONLY sent to the AI model when a user explicitly enters a prompt and submits it. NO sheet data is shared with the AI model by simply having these features enabled or opening the AI tools panel.

Data storage, residency, and retention

In order to provide quality service and support, input prompt and generated output data is stored alongside sheet data in Smartsheet’s 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.

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



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.