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. We never allow a third party to train its foundation models on your data. 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

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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 model providers 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 features at Smartsheet

In the following sections, we'll detail how the AI capabilities that are generally available today work and how you can use them.

Generally available AI features inside the Smartsheet platform

- Smart Assist, including Agentic Workflows and specialized agents such as the Data Quality Agent
- Smart Columns
- AI dashboard builder and AI chart creation
- Generate formulas
- Analyze data
- Intelligent form fill
- Creation Agent (AI creation)

Smartsheet AI features use **Azure OpenAI** and **Amazon Bedrock** (which provides access to Anthropic models) as our AI model providers. The capabilities available to your organization depend on your Smartsheet plan. To learn more, visit our pricing page.

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Smartsheet also offers an **MCP Server** to enable users to connect live Smartsheet data to their organization's AI assistants and agents, including Claude, Microsoft Copilot, and others.

Additionally, System Administrators can choose which AI capabilities are activated for end users using AI activation controls in the Admin Center. Agentic Workflows and specialized agents are capabilities of Smart Assist and surfaced by the Smartsheet MCP Server, so they follow the availability of those features. All AI features respect customers' data residency selection, and you can learn more about data residency options in the Smartsheet Trust Center. Our AI features are not currently available in Smartsheet Gov.

The models used to generate outputs in these features 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 features.

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 the Trust Center.

Dataflow and transmission to third parties
When using Smartsheet AI features, the following information is sent to the AI model hosted by the AI model 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, sheet, or workspace context, including column names, data types, allowed values for dropdown 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 SOC 2 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 operate the Smartsheet service, provide customer support, monitor for abuse, or review feedback you choose to submit. Learn more about secure data storage and retention in the Trust Center.

Input prompts and generated outputs are not stored by our AI model providers beyond what is necessary to generate a response, and our enterprise contracts with AI model 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.

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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.

How agents work in Smartsheet

Some Smartsheet AI capabilities use agents: AI that works toward an outcome, deciding which steps to take and which tools to use to complete a task, rather than returning a single response. Agents in Smartsheet are not separate products to install or configure. They run within Smart Assist and the Smartsheet MCP Server and follow the same security, permission, and data-handling commitments described throughout this whitepaper.

Orchestration and specialized agents

When a request is made in Smart Assist, Smart Assist determines whether it can be answered directly or should be handled by a specialized agent built for that kind of work, such as the Data Quality Agent, which reviews sheets, workspaces, or multiple workspaces for incomplete, conflicting, or out-of-date data. When a request comes from a connected AI tool through the MCP Server, the connected AI tool decides which Smartsheet tools to call, guided by Smartsheet's tool descriptions and skills. If it calls a specialized agent, that agent runs within Smartsheet and receives only the context needed for its task. Some capabilities, such as the Creation Agent, use several agents working together on a single request.

Skills

Skills are built-in instructions, maintained by Smartsheet and run on Smartsheet servers, that guide how AI works with Smartsheet data. Because skills are served from Smartsheet rather than configured by each user, they behave consistently whether a request comes from Smart Assist or from an AI tool connected through the MCP Server. Skills do not grant additional access. They operate within the requesting user's permissions.

Guardrails that apply to every agent

- **Permissions:** Agents never access more than the requesting user can, regardless of entry point.
- **Approval:** Changes to data proposed by an agent require user approval before they are applied.
- **Auditability:** All agent actions are recorded in the audit log under the accountable user's account.
- **Consistency across entry points:** The same permissions, approval steps, and audit trail apply whether an agent is invoked in Smartsheet or through a connected AI tool.

Smart Assist

What is Smart Assist

Smart Assist is a conversational AI assistant embedded in Smartsheet that enables users to query, analyze, and act on their project data through natural language. Built on the same intelligence layer as the Smartsheet MCP Server, Smart Assist understands the structure and context of your sheets, workspaces, and team activity — providing answers, surfacing risks, and executing actions without requiring you to navigate menus or write formulas.

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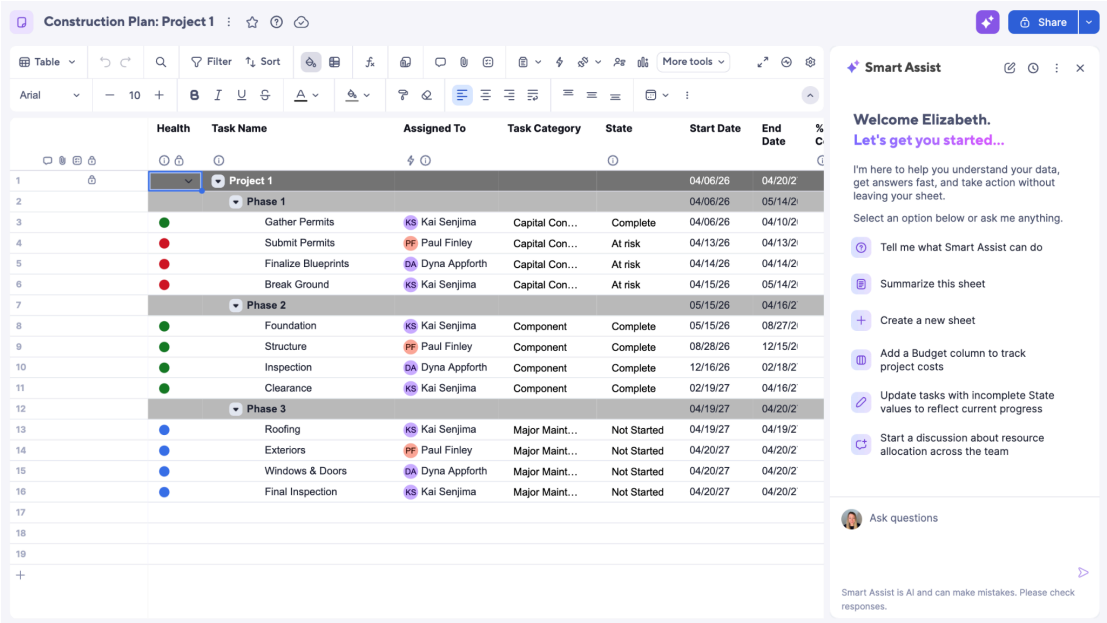
How should I use Smart Assist

Smart Assist can be used directly within Smartsheet to ask questions, retrieve information, and take action on your data. You can query project status, surface risks, and generate stakeholder communications from live sheet data, as well as put recurring requests on a schedule with Agentic Workflows. When a request calls for specialized work, such as a data quality review across a portfolio, Smart Assist hands it to the right specialized agent (see ***How agents work in Smartsheet*** above). Smart Assist also supports structural actions and data changes — adding or bulk-updating rows, updating cell content, creating sheets, workspaces, and folders, managing discussions, attaching links, and viewing sharing details — all through natural language, with user permission and approval.



Dataflow and transmission to third parties

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

- Input prompt entered by the user
- Context about the user's current sheet and workspace, including sheet ID, sheet name, and list of columns
- User and account context required to fulfill the request, such as the current user's email address, task assignments, deadlines, and project status
- Prior inputs and outputs from the active Smart Assist conversation history, in order to allow users to build upon or refine prior requests
- When a request is handed to a specialized agent, only the context needed for that task, drawn from the categories above, is sent to the AI model

Agentic Workflows

Agentic Workflows let users schedule a request, made in Smart Assist or through the Smartsheet MCP Server, to run automatically on a recurring basis, such as a weekly project summary or a data quality check, with the output delivered by email. Each run executes under the permissions of the user who created the workflow, evaluated at the time of the run. If that user's access changes, later runs reflect the change.

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Users need at least Viewer permissions on an item to create an Agentic Workflow. Agentic Workflows are currently read-only; they cannot write, change, or delete data. When an Agentic Workflow delivers output to other people, the creator can require approval before it's sent. Smartsheet notifies the creator in Notifications and by email, and the creator approves or denies the output in Smart Assist.

Only the creator can view and manage their Agentic Workflows, including starting and stopping them, in Smart Assist or through the Smartsheet MCP Server.

Dataflow and transmission to third parties for Agentic Workflows

At each run, the following information is sent to the AI model hosted by Amazon Bedrock:

- The scheduled request as entered by the user
- Context for the referenced sheet(s), which may include multiple sheets: column names, data types, allowed values for dropdown columns, and cell data needed to fulfill the request
- User and account context for the workflow's creator, required to fulfill the request

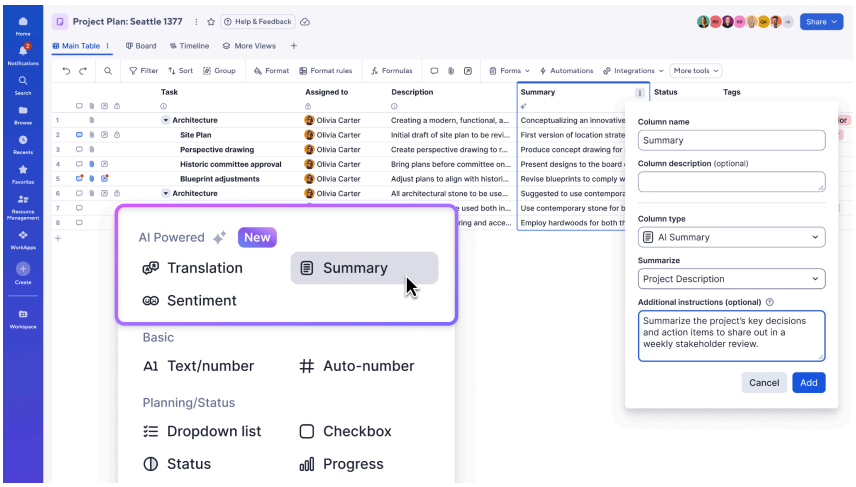
Smart Columns

What are Smart Columns

Smart Columns are AI-powered column types embedded directly in Smartsheet sheets. Each column is configured to perform a specific AI operation — such as sentiment analysis, translation, or summarization — and processes data automatically across every row as it changes, without requiring manual input or separate automation rules.

How should I use Smart Columns

To use Smart Columns, add a new column to a sheet and select an AI column type from the column configuration options. Select the source column(s) and add any relevant instructions for the output, and the Smart Column will automatically process each row and populate results — translated values, sentiment labels, summaries, or custom AI-generated outputs based on your instructions. Results update continuously as underlying data changes, keeping your sheet current without manual intervention.



Dataflow and transmission to third parties

When a Smart Column processes a row, the following information is sent to the AI model hosted by Azure OpenAI:

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- The AI column's configured transformation type and instructions, as well as any user-added instructions
- Cell data from the selected source column(s) for the row being processed
- Relevant column metadata and context, including column names and dropdown values for the selected source columns

Smart Columns process data at the row level as rows are created or updated.

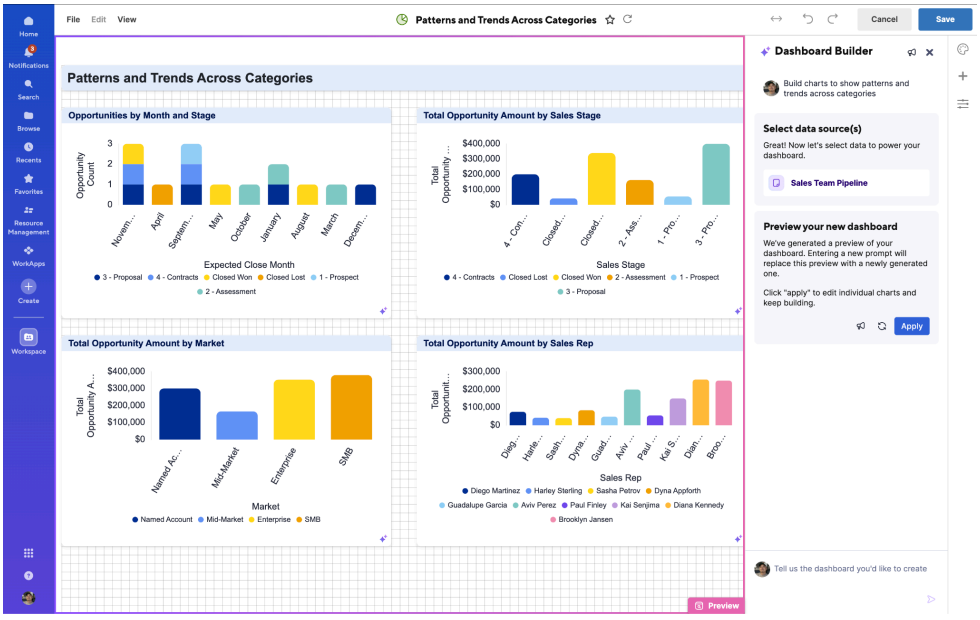
AI dashboard builder

What is the AI dashboard builder

The AI dashboard builder enables users to create Smartsheet dashboards through natural language, without manually configuring individual widgets. Users describe the view they need, select their data sources, and the AI dashboard builder generates a populated dashboard — including relevant charts, metrics, and layout — as a starting point that can be reviewed and customized before publishing.

How should I use the AI dashboard builder

To use the AI dashboard builder, navigate to the dashboard creation flow and describe the view you want in plain language — specifying the type of data, project context, or audience as relevant — and select the sheets or data sources to draw from. The AI dashboard builder will generate up to 10 widgets based on your request. Review the output, make any adjustments to individual widgets or layout, and publish when ready. The resulting dashboard reflects live data from your selected sources and can be edited further using standard dashboard configuration options.



Dataflow and transmission to third parties

When using the AI dashboard builder, the following information is sent to the AI models hosted by Amazon Bedrock:

- Input prompt entered by the user
- Context about the user and the user's account in order to determine language preferences for localized responses

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- Suggested widget titles and descriptions, chart types, and presentation options, as well as scoring thresholds for ranking widgets
- Context for the referenced sheet(s) for chart creation and refinement — column names, data types, allowed values for dropdown 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 prompt history in order to allow a user to build upon or refine prior requests

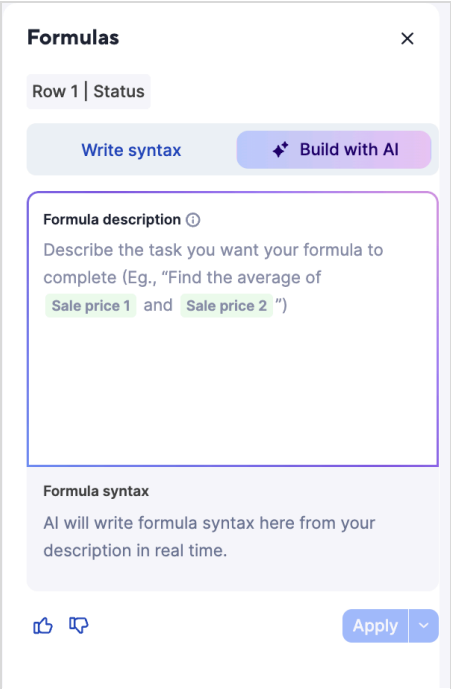
Generate formulas

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 Amazon Bedrock:

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

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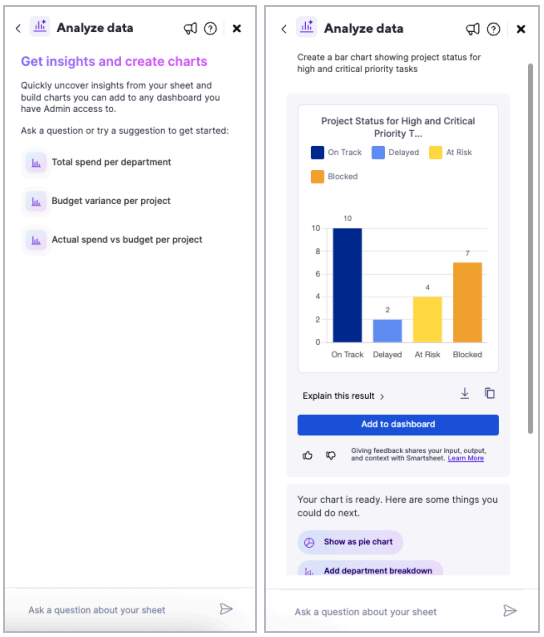
Analyze data

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 Amazon Bedrock:

- Input prompt entered by the user
- Context for the sheet — column names, data types, allowed values for dropdown 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 refine prior requests
- 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"

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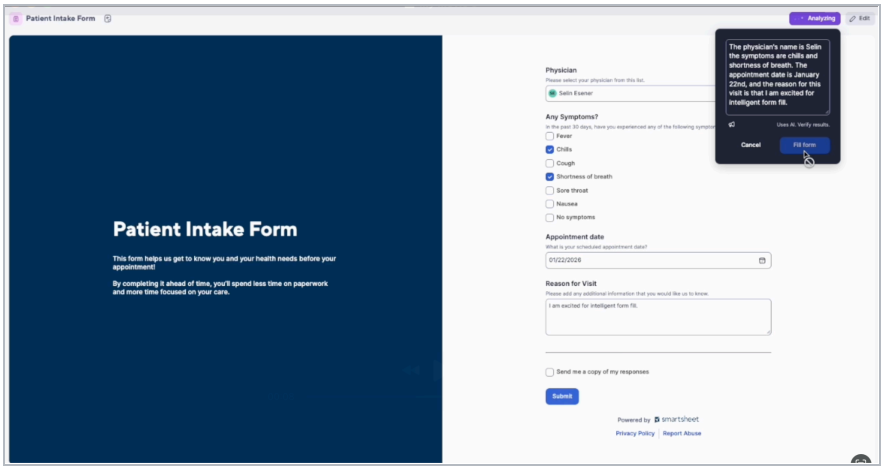
Intelligent form fill

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 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"

Creation Agent (AI creation)

What is the Creation Agent

The built-in Creation Agent helps users create structured workspaces, individual workspace items (sheets, reports, forms, automations, and dashboards) and portfolios faster, whether they're starting new projects or adding to existing work. They simply describe what they need in natural language and a team of specialized agents generates it, with the option to review, adjust, and confirm before anything is built.

How should I use the Creation Agent

From within Smartsheet: navigate to the Create menu or your home page and select 'Create with AI' or 'Create a Workspace.' Describe your goal or choose a suggested prompt starter, and a structure for your

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workspace or asset will be generated for you. You can review and adjust before confirming. Once approved, your workspace, portfolio, or item is created and ready to use.

You can also create workspaces with AI using the Creation Agent from within Smart Assist or from your organization's AI tools through the Smartsheet MCP Server.

Dataflow and transmission to third parties
When using AI to create, the following information is sent to the AI model hosted by Amazon Bedrock:

- Input prompt entered by the user, including the contents of any attachments
- User inputs such as industry, work type/category, company size, and specific use cases (e.g., track KPIs) selected by the user
- When adding to existing workspaces, context for the relevant workspace or items, such as item names, column names, data types, and existing structure
- Prior inputs and outputs from the active conversation, if applicable, to allow users to refine their request

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 Support 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.

Learn more about Salesforce's secure AI infrastructure, including data storage, residency, and retention.

Smartsheet MCP Server

What is the Smartsheet MCP Server
The Smartsheet MCP Server enables users to connect live Smartsheet data to their organization's AI assistants and agents, including Claude, Microsoft Copilot, ChatGPT, Google Gemini, Amazon Quick, and others. Model Context Protocol (MCP) is an open standard that functions as a secure bridge between an AI client and a business application, allowing AI to access data, assist with workflows, and automate routine operations in real time.

By connecting Smartsheet to an AI assistant or agent via the MCP Server, users can apply AI reasoning to Smartsheet data and make changes and updates conversationally — enabling natural language queries,

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automated row and sheet operations, and complex tasks that require both data analysis and decision-making.

Supported capabilities include discovery and search across sheets, reports, dashboards, folders, and workspaces; sheet and row management; workspace and folder creation; cell history retrieval; and managing comments and attachments. Smart Assist capabilities, including Agentic Workflows and specialized agents such as the Data Quality Agent, Automations Agent, and Creation Agent, are also available as MCP tools. See the Smartsheet MCP Server help article for the full list of supported tools.

How should I use the Smartsheet MCP Server
Connect Smartsheet to your AI assistant or agent of your choice and interact with your data using natural language. With your consent, the AI can access predefined tools to summarize sheets, create rows, update data, and more. The AI determines which tools are needed, the Smartsheet MCP Server executes the request, and results are returned directly in your AI interface. Learn how to connect Smartsheet to your organization's AI assistants and agents.

Dataflow and transmission to third parties
When a request is made through the MCP Server, the following information may be transmitted to the connected AI platform (e.g., Claude) to fulfill that request:

- The user's natural language input prompt
- Smartsheet data the user has permission to access, including sheet structure (column names, data types), row data, comments, attachments, and attachment metadata, scoped to the specific objects referenced in the request
- User and account context required to fulfill the request (for example, to answer questions about tasks assigned to the current user)

AI assistants or agents connected to Smartsheet data via the MCP Server can only access data the user already has permission to view or edit. The connected AI cannot browse a workspace independently or access data beyond the scope of what the user directly requested. Once Smartsheet returns data to a connected AI tool, how that tool processes, stores, and uses the data, including whether it may be used for model training, is governed by your organization's agreement with that AI provider, not by Smartsheet.

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 Certification: Smartsheet is certified to ISO/IEC 42001, the first international standard for AI management systems. The standard sets requirements for how an organization governs AI across its lifecycle, including risk and impact assessment, accountability, and supplier oversight, and an accredited third-party auditor evaluates that system before certifying it. Our certification covers Smartsheet's practices as an AI provider. Learn more in the Trust Center.

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Admin controls for AI capabilities

Smartsheet System Administrators can control which AI capabilities are enabled for their organization through a dedicated control panel in the Admin Center. Simple on/off toggles allow admins to enable or disable individual AI features, supporting phased adoption and granular control over your AI rollout. See a full list of available toggles in the AI management overview help article.

Organizations with specific compliance requirements or organizational policies that require AI to be fully disabled should reach out to their Smartsheet contact for assistance. Please note that Smartsheet AI features are designed to enhance your experience while operating within your existing security and permission structures — we encourage customers to review the security details in this whitepaper before opting out entirely.

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.

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