



MAKING THE CASE

For IT: approving *Formuly*

Formuly is a Windows Excel add-in backed by its own cloud services in Microsoft Azure, Australia East. Your analysts sign in with their existing Microsoft work accounts. Workbook files stay on your machines, and Formuly's AI works from model structure, not the numbers in your models.



01

Your data, *kept close*

Hosted in Australia, and only what each feature needs.

- **Structure, not values.** Formuly sends labels, layout, and formulas. Numeric cell values are masked before anything reaches the AI model.
- **Workbooks stay put.** Whole files leave the workstation only if an analyst turns on workbook versions, which is off by default.
- **Australian hosting.** Azure Australia East, replicated to Australia Southeast. TLS 1.2 or later in transit, platform encryption at rest, secrets in Key Vault.

02

AI under *contract*

Zero data retention, and no training on your data.

- **One path to the model.** Only Formuly's backend calls Anthropic's Claude models. The add-in never contacts an AI provider directly.
- **Provider terms.** Anthropic keeps no request content and doesn't train on it. Inference runs in the United States.
- **Our own records.** Request content is kept in Australia for quality review, then removed after 90 days.

03

Your identity, *your controls*

Sign-in and MFA stay in your own tenant.

- **No new passwords.** Analysts join as Microsoft Entra B2B guests and authenticate against your directory, under your MFA and policies.
- **Separated by design.** Every request is checked at the gateway and scoped to your organization. Disable a user in your directory and access ends within 24 hours.
- **Signed software.** The installer and updates carry a DigiCert code-signing certificate, verified before any update applies.

APPROVING IT

No infrastructure on your side

SOC 2 Type 1 and ISO/IEC 27001 audits are in progress, with controls tracked continuously in Drata. The full Security and Integration Overview covers the detail, and we answer security questionnaires before go-live.

What you do

- 1 Allow outbound B2B collaboration with Formuly's tenant for the invited analysts.
- 2 Allow Formuly's endpoints through your proxy and firewall, over HTTPS on port 443.
- 3 Approve the signed installer, published by Formuly Technologies Limited, for your Excel estate.

What to ask us for

The full Security and Integration Overview

The network allowlist and installer details

Answers to your security questionnaire

Routing AI through your own Claude access

Your models stay yours. Here's what Formuly sees.

Formuly Technologies Limited. Sub-processors: Microsoft Azure (Australia East and Southeast) and Anthropic (United States). Our privacy notice is at formuly.com/legal/privacy.html.

[Request the full overview](#)

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