

Documotor Security Brief

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1. About

Documotor is a modern document generation platform that allows document creation based on data transformation steps, templates designed in Microsoft office, and APIs, to create documents from within any system.

It allows virtually any system or process to benefit from document automation with ease. The service is system and data agnostic, meaning any system capable of transferring data can be used to generate automated documents. Automation of tedious manual processes for generation of for example quotes, proposals or contracts is one of the core strengths of our platform.

Documotor is hosted on the Microsoft Azure platform (Azure), the leading cloud infrastructure platform in the industry. Our services are distributed horizontally to improve resiliency and provide the expected availability. Azure is certified with ISO 27001 and PCI DDS amongst others and provides geo-redundancy of all template configurations stored in Documotor with high security and reliability. Server patches are maintained by Microsoft. All communication is encrypted in transit using SSL (TLS), and data is encrypted at rest.

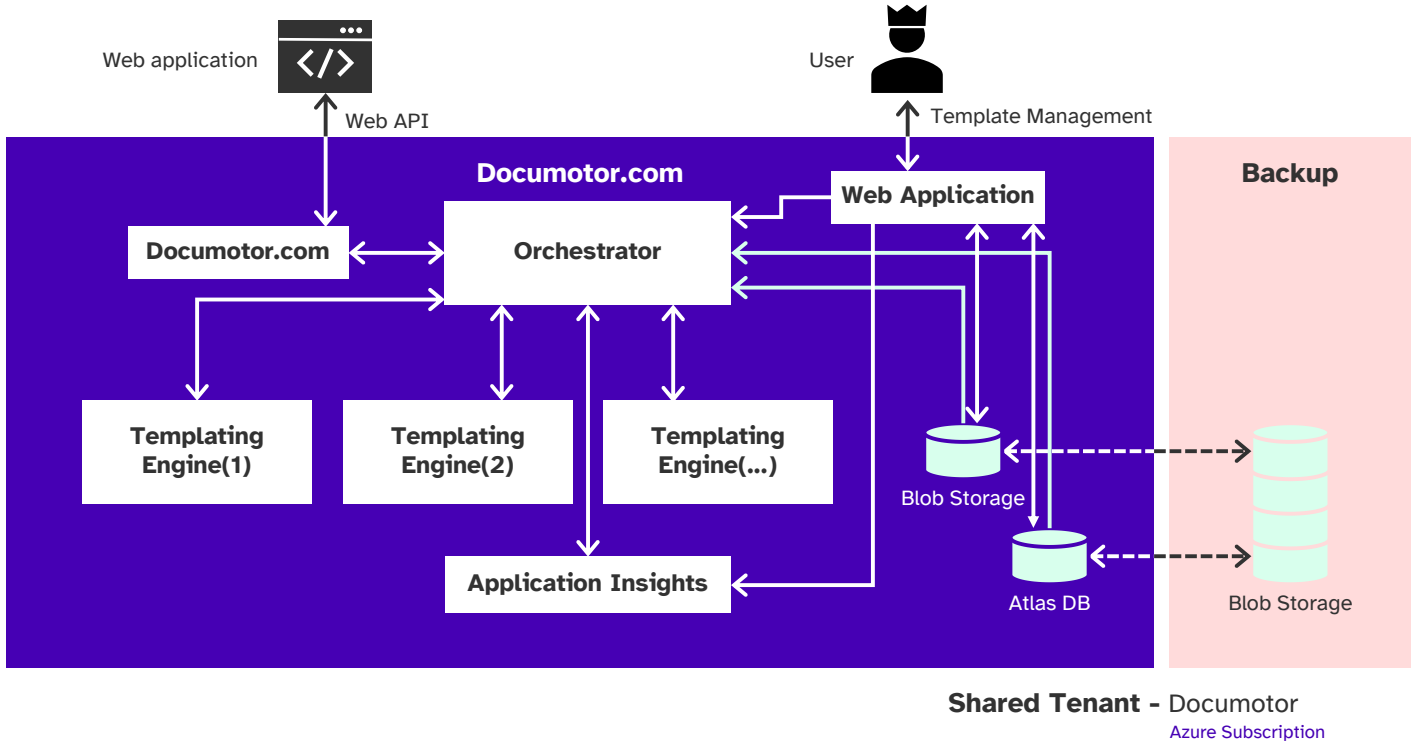
Documotor does not require access to outside infrastructure but relies on data payloads send to produce documents. Documents are constructed in a synchronous stream without persisting document on our side.

Our Documotor services are built on Docker supporting cloud, hybrid, or self-hosted solutions.

Details on Azure security is available at the [Microsoft Trust Center](#).

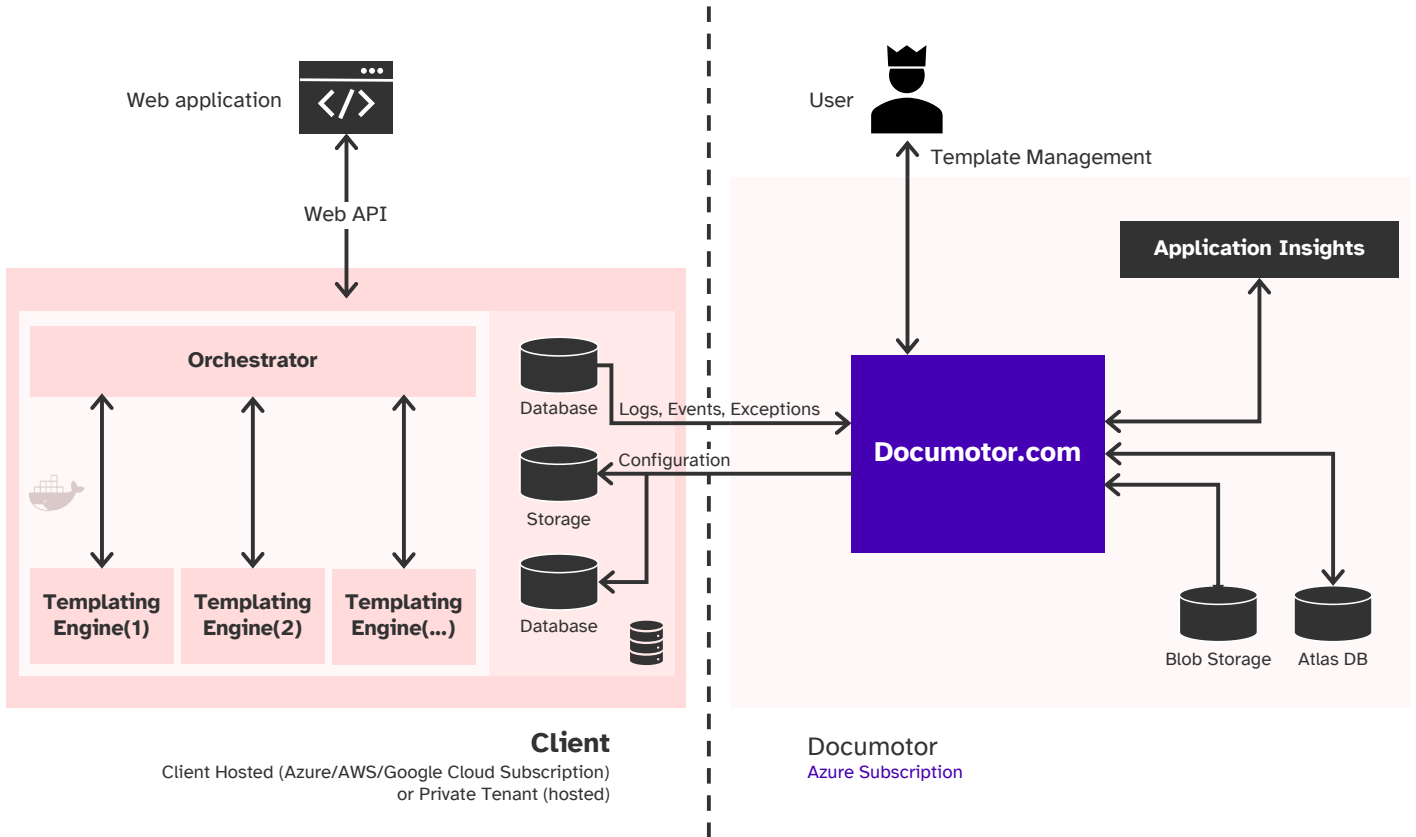
2. Reference Architectures

2.1 Managed Cloud (Standard)



Documotor maintains the Documotor solution.

2.2 Hybrid



Documotor maintains the management side of templates and admin access.

Client maintains the runtime for generation of documents based on templates from the cloud tenant.

2.3 Self-hosted

Similar architecture to 2.1 running on client infrastructure.

Components are provided configured to specific versions of docker images, or to pull from master of our docker repository (Azure Container Registry).

3. Encryption

All communication in the web application and using the API is protected by the industry standard SSL (TLS) with encryption in transit and at encryption rest in the backend.

4. Geolocation

Processing and storage of client data and templates in Documotor is performed in Microsoft Azure in the Northern European and Western European Data Centers.

Primary Data Center: Dublin, Ireland

Secondary Data Center: Amsterdam, Netherlands

Both are GDPR compliant.

5. Authentication

Administrators are authenticated using username/password and may enable two-factor authentication to increase the safety of their personal credentials.

All API requests are protected by a service secret, the client should configure a secret per unique system connecting to Documotor.

6. Data Processing Agreement

Documotor is covered in the Documotor DPA.

6.1 Brief

Documotor receives a payload from the initiating service. This payload is streamed to the appropriate internal processor, i.e., Word/PowerPoint templating engine. Once the document has been processed it is returned to the requester.

This document is not persisted or recoverable by Documotor.

The client can store sample data for template configuration by enabling data recording. This will persist the latest payload until disabled and cleared by the client. The client is responsible for ensuring that this sample data complies with regulations as Documotor does not control or check the content of sample data.