



**MERRILL DATASITEONE**  
SECURITY OVERVIEW FOR M&A PRACTITIONERS

# Protecting data, enabling agility with ironclad security.

Merrill DatasiteOne empowers Chief Information Officers and Information Security leaders to tackle a mounting challenge: securing sensitive data and assets from the increasing threat of cyberattack—without impeding the seamless information sharing that powers digital productivity. The transformative, cloud-based DatasiteOne deal-making platform is built on a foundation of proactive security, giving you assurance that your valuable, sensitive business data is protected. We deliver robust capabilities to authorize, control and monitor access—all while enabling efficient internal collaboration and seamless reviewer access that is critical to a deal’s success.

## PROACTIVE SECURITY POSTURE

Merrill’s proactive security posture consists of three elements:

1. Using advanced security technology across the development, testing and operational stages.
2. Aligning security functionality with industry best practices.
3. Rigorous implementation of security protocols.

## HIGH-ASSURANCE AUTHENTICATION

DatasiteOne puts the VDR administrator in charge of access controls with an array of authentication and permission options, ensuring the data security chain.

- + Automatic and periodic password reset controls
- + Permission management at the user, group and document levels

## APPLICATION & ARCHITECTURE SECURITY

Merrill developed the DatasiteOne architecture and engineering based on best-in-class practices.

- + Presentation layer, application processing and data management functions subject to logical abstraction
- + Coding conducted using SANS and OWASP guidelines
- + Vulnerability scanning and penetration testing of applications conducted at regular intervals

**5,654**

VIRTUAL DATA ROOMS  
OPENED WORLDWIDE IN 2016

**22**

TECHNOLOGY AWARDS  
IN THE PAST 8 YEARS



## DATA SECURITY

As a multi-tenant cloud application, DatasiteOne uses the latest cloud security best practices.

- + User information, application data and logs are stored and maintained separately
- + Passwords treated with cryptographic hash algorithms
- + Customer supplied files encrypted at-rest with AES 256-bit encryption and backed up according to a pre-defined schedule
- + In-transit data secured via 256-bit SSL encryption
- + Events captured, analyzed and actioned in real time
- + Customer files accessed only upon request and supported by documented access review and change management processes
- + Upon project closure, project files are purged after 30 days

### Additional data security functionality includes:

- + Uploaded documents are converted to formats compatible with our secure document viewer
- + Document download protection is delivered through customized, secure watermarks
- + Project access disclaimer content and frequency of acceptance, controlled by the Project Administrator

## SYSTEMS, NETWORK & INFRASTRUCTURE SECURITY

Merrill DatasiteOne runs on top of Microsoft® Azure, leveraging Microsoft's industry-leading security investments. To take system and network security to a higher level, Merrill adds its own security protocols and access-control mechanism.

- + Endpoints protected with third-party security tools
- + Infrastructure and application penetration test conducted at regular intervals using an industry-recognized third-party
- + Vulnerability scans conducted and tracked regularly
- + Perimeter defenses include reverse proxy and Microsoft's proactive multi-layer network
- + US and EU data centers ensure that project files are hosted only in those source regions

## HIGH AVAILABILITY

High availability is monitored 24/7 through our global support organization and by our service providers. Availability guarantees are outlined in our services agreement.

## COMPLIANCE

- + Merrill complies with all U.S. and international laws in its business conduct
- + Project log files are retained under exchange record-keeping requirements
- + EU-US Privacy Shield certified

## MERRILL'S COMMITMENT TO IRONCLAD SECURITY

Merrill takes security very seriously. Our dedicated security organization, headed by our Chief Information and Security Officer, drives alignment across our organization for deep risk management and strong governance.

- + Product offerings have been ISO 27001 certified since 2008
- + SSAE 16 SOC 2 Type II attestation by 2018
- + Our infrastructure provider is ISO 27001, SSAE 16 SOC 2 Type II and FedRAMP certified
- + Merrill employees, where legally possible, subject to a background check that includes screening for drugs, qualifications and previous employment
- + All Merrill staff are subject to mandatory annual security training, including acknowledgment and NDA
- + Security incident response plan tested annually and includes external and internal notification, escalation procedures and communication criteria
- + Disaster recovery plan tested at prescribed intervals to ensure compliance with self-imposed timeframes and quality objectives

**Merrill Corporation secures solutions at every phase, so you can secure ongoing impact and growth.**

**To learn more about our corporate services and solutions, please connect with us.**

phone 888.311.4100    email [info@merrillcorp.com](mailto:info@merrillcorp.com)    web [merrillcorp.com](http://merrillcorp.com)