

## **THE CONCIERGE ASSISTANT® (CA) - CISP IMPLEMENTATION GUIDELINES**

As of December 2006, The Concierge Assistant® is a Visa CISP and PABP validated solution.

### **Build and Maintain a Secure Network**

Install and maintain a secure firewall configuration to protect data.

The Database folder Network share must not be connected to the Internet. All access by individuals with root or administrative privileges should be audited. All access to the logging file (TheCAS.mdb) should be audited. The creation or deletion of system-level objects should be audited. These audit logs should be reviewed on a regular basis.

In addition to writing out log events into the database, the Concierge Assistant also writes out log events to a file named 'TheCAS.mdb'. This file contains a log of deleted records, credit card views, user logons, and password changes. This log file is located in the shared network path originally set up. We highly recommend that you frequently back up this file to read-only media (CD or DVD). We also recommend that you turn on Windows Auditing to log all access to this file which will allow your organization to track all changes to this file.

Remove all unnecessary and insecure services and protocols (e.g., NetBIOS, filesharing, Telnet, unencrypted FTP, and others) from the Network Share and the workstations.

If wireless transmission is used encrypt the transmissions by using Wi-Fi Protected Access (WPA) technology if WPA capable, or VPN or SSL at 128-bit. Never rely exclusively on WEP to protect confidentiality and access to a wireless LAN. Use one of the above methodologies in conjunction with WEP at 128 bit, and rotate shared WEP keys quarterly and whenever there are personnel changes.

If employees, administrators, or vendors can access the application remotely, access should be authenticated using a 2-factor authentication mechanism. The application should allow for technologies such as RADIUS or TACACS with tokens, or VPN with individual certificates.

Do not use vendor-supplied defaults for system passwords and other security parameters.

Logon to the network and database should require a unique username and strong password.

Strong Passwords are defined as follows:

Minimum of 7 characters; Maximum of 10 characters; Must contain at least one alphabetic character; Must contain at least one numeric character; Must not contain the User Logon Name; Must not reuse four previous passwords

Gold Key highly recommends that the user configures Safe Passwords and incorporates the same above password characteristics that we recommend for the CA passwords.

In The Concierge Assistant we supply you with a Generic Logon: Concierge/Manager



Effective with version 9.0.3, CA uses a default username and password when it is initially sent to the client. CA detects the first time CA is opened and CA forces the user to change the password.

Prior to version 9.0.3 CA worked as follows. After initial installation the password for Concierge had to be changed manually to a strong password or deleted. The Concierge logon/password should never be used by the concierge staff.

The recommended security settings can be found in the Administration Tab of The Concierge Assistant on the Security Options panel:



## Protect Cardholder Data:

All Credit Card information is encrypted using Triple DES or AES encryption methods with the encrypted value converted to a hexadecimal string.

In The Concierge Assistant credit card information is found only in the Logbook and Profiles subsystems of CA. The credit card information is encrypted and is password protected:

## Logbook Entry:

The Concierge Assistant Logbook Manager - Concierge Manager - Wednesday, August 16, 2006

**Concierge Logbook Manager**

Last Name: Olson  
First Name: Sandi  
Room Number:  
Arrival Date:  
Reference Date: Wednesday, 8/23/2006  
Type of Entry: Transportation  
Entry is Pending: No  
Entry is Cancelled: No  
Entry is Complete: No

**Transportation**

Name of Company: AAA Limo  
Time: 4:00pm  
Type of Vehicle: Sedan 2  
Address:  
Price: \$200.00  
Commission:  
Pick Up from: SFO - to Hotel  
Special Instructions:  
Credit Card/Exp: xxxx-xxxx-xxxx-1977 02/06  
Confirmed With/Confirm #: Marcus  
Telephone Contact: (310) 555-1212  
Time it took:  
Received Date:

Save Close  
cc English

## Profile Entry:

Maintain Guest Profile Information - Concierge Manager - Wednesday, August 16, 2006

Last Name: Wilson  
First Name: James A

Group Name: Hewlett Packard  
Company Name:  
Job/Title:  
Home Email: jawilson@aol.com  
Business Email:  
Profile Type:  
Color Code this Profile: ☒ Red ☒ Green ☒ Blue ☒ Black  
Private Entry (Shown Only to Authorized Users) ☒

Home Phone: (213) 555-1212  
Cell Phone: (213) 555-1313  
Business Phone: (213) 555-2020  
Fax Phone: (213) 555-2121  
Other Phone:

Notes:  
Guest has visited us 3 times in the last seven months.

Indicators Contact History Group Logs Logbook Entries Credit Cards Contact Flags

Credit Card Information:

Type	Credit Card Number	Expiration MM/YY
Visa	xxxx xxxx xxxx xxxx	xx/xx

mm/yy  
Delete Change Add

Create Group Logbook Entries

Rights to the Credit Card information are given by the Administrators of the Program:

Additional Staff Information - Support Profile - Thursday, August 24, 2006

**Maintain Additional Staff Information**  
Clayton Hale

Language Skills | Security Authorizations | Logbook Categories

Optional - Clone Concierge Rights: [Dropdown] [Clone] [Save]

**The Tabs**

- ☒ Contacts (Required)
- ☒ Events
- ☒ Logbook
- ☒ Messages
- ☒ Others
- ☒ Profiles
- ☐ Administration
- ☒ Maintenance

General | Contacts | Events | Logbook | Messages | Others | Profiles | Administration | Maintenance

<input checked="" type="checkbox"/> Add/Maintain Logbook Entry	<input checked="" type="checkbox"/> Send Logbook Messages	[Check All]
<input checked="" type="checkbox"/> Show Due and Overdue	<input checked="" type="checkbox"/> Print Logbook Details	
<input checked="" type="checkbox"/> Print Confirmations for Selected Guests	<input checked="" type="checkbox"/> Print/Email Vendor Service Request	[Uncheck All]
<input checked="" type="checkbox"/> Print Guest Itineraries	<input checked="" type="checkbox"/> Print/Email Guest Service Request	
<input checked="" type="checkbox"/> Show Logbook Messages	<input checked="" type="checkbox"/> Print/Email Guest Confirmation	
<input checked="" type="checkbox"/> Maintain Guest Notifications	<input type="checkbox"/> Decrypt Credit Card Number	
<input checked="" type="checkbox"/> Link to Profiled Guests	<input type="checkbox"/> Decrypt Profile Credit Card Numbers	
<input checked="" type="checkbox"/> Edit Guest Profile		
<input checked="" type="checkbox"/> Select Guest Profile		
<input checked="" type="checkbox"/> Deselect Guest Profile		
<input checked="" type="checkbox"/> Work with Reservations		
<input checked="" type="checkbox"/> Export Logbook Information		

Additional Staff Information - Support Profile - Thursday, August 24, 2006

**Maintain Additional Staff Information**  
Clayton Hale

Language Skills | Security Authorizations | Logbook Categories

Optional - Clone Concierge Rights: [Dropdown] [Clone] [Save]

**The Tabs**

- ☒ Contacts (Required)
- ☒ Events
- ☒ Logbook
- ☒ Messages
- ☒ Others
- ☒ Profiles
- ☐ Administration
- ☒ Maintenance

General | Contacts | Events | Logbook | Messages | Others | Profiles | Administration | Maintenance

<input checked="" type="checkbox"/> Add/Maintain Profile Information	<input checked="" type="checkbox"/> Maintain Contact Types	[Check All]
<input checked="" type="checkbox"/> Import Profiles	<input checked="" type="checkbox"/> Maintain Contact Results	
<input checked="" type="checkbox"/> Extract Profile Lists	<input checked="" type="checkbox"/> Maintain Profile Types	[Uncheck All]
<input checked="" type="checkbox"/> Maintain Profile Notes		
<input checked="" type="checkbox"/> Send Indicator Email		
<input checked="" type="checkbox"/> Maintain Indicators		
<input checked="" type="checkbox"/> Maintain Correspondence		
<input checked="" type="checkbox"/> Create/Maintain Group Logs		
<input checked="" type="checkbox"/> Maintain Logbook Entries		
<input checked="" type="checkbox"/> Maintain/Decrypt Credit Cards		
<input checked="" type="checkbox"/> Maintain Contact Flags		

The Administrators can give individual rights to each employee based on their need to know basis.

## **Maintain a Vulnerability Management Program:**

Use and regularly update anti-virus software.

Develop and maintain secure systems, if Remote Access is allowed implement appropriate security and encryption procedures. This includes two-factor authentication (username and password).

## **Implement Strong Access Control Measures:**

Restrict access to data by business need-to-know.

All Logbook categories and Profile information is restricted by the Administrators for each individual employee.

For a regular user, Administrators can restrict even the logbook categories that each employee can see:

Additional Staff Information - Support Profile - Thursday, August 24, 2006

**Maintain Additional Staff Information** Close

Clayton Hale

Language Skills Security Authorizations Logbook Categories

☐ Authorized to Use ALL Logbook Categories Save

Optional - Clone Concierge Rights: [Dropdown] Clone

**Logbook Categories**  
(Double-Click to Select)

- Accommodation
- Afternoon Tea
- Airline Reservation
- Akai Airport Shuttle
- Amtrak
- Attendance - Concierge lounge
- Attractions
- Balloons
- BC Ferry
- BC Museum
- Beauty Services
- Boat Charters
- Business Center/AV
- Car Rental
- Coho Ferry
- Courier service
- Event Tickets
- Ferry Reservation
- Guest teck problem
- Hotel Reservations
- Hotel Safe
- Incident

**Selected Categories**  
(Double-Click to Remove)

- Dining Reservation
- Fax Log Sheet
- Fax/Photo Copies
- Florist
- Golf

Administrators can also make the data entry panels contain or not contain credit card information:

With Credit Card Information:

Design Data Entry Form

Transportation

Name of Company:

Time:

Type of Vehicle:

Address:

Price:

Commission:

Pick Up from :

Special Instructions:

Credit Card/Exp:

Confirmed With/Confirm #:

Telephone Contact:

Time it took:

Received Date:

Save Data Entry Design

Close

0-9 DnP Label to be used for information requested:

Link C2DE

Clear All

Delete

Add

Close

0-9	DnP	C2DE	Message Text
		1	Name of Company:
		0	Time:
		0	Type of Vehicle:
		0	Address:
		0	Price:
	DnP	0	Commission:
		2	Pick Up from :
		0	Special Instructions:
	DnP	0	Credit Card/Exp:
		0	Confirmed With/Confirm #:
		0	Telephone Contact:
		0	Time it took:
	DnP	0	Received Date:

Please be aware that:

If you decide to CHANGE the TEXT of "Label to be used for information requested:" ALL of the entries you and your staff have entered for the Logbook Entry type WILL BE UPDATED in both the Current and the Archive Tables! This can be a LENGTHY process.

Without Credit Card Information:

Design Data Entry Form

Transportation

Name of Company:

Time:

Type of Vehicle:

Address:

Price:

Commission:

Pick Up from :

Special Instructions:

Confirmed With/Confirm #:

Telephone Contact:

Time it took:

Received Date:

Save Data Entry Design

Close

0-9 DnP Label to be used for information requested:

☒

Link C2DE

Clear All

Delete

Add

Close

0-9	DnP	C2DE	Message Text
		1	Name of Company:
		0	Time:
		0	Type of Vehicle:
		0	Address:
		0	Price:
	DnP	0	Commission:
		2	Pick Up from :
		0	Special Instructions:
		0	Confirmed With/Confirm #:
		0	Telephone Contact:
		0	Time it took:
	DnP	0	Received Date:

Please be aware that:

If you decide to CHANGE the TEXT of "Label to be used for information requested:" ALL of the entries you and your staff have entered for the Logbook Entry type WILL BE UPDATED in both the Current and the Archive Tables! This can be a LENGTHY process.

Assign a unique ID to each person with computer access.

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The Concierge Assistant does not provide for group logons. All employees have unique logons and passwords:

The screenshot shows the 'The Concierge Assistant - Support Profile' window for Thursday, August 24, 2006. The window has a menu bar with 'Contacts', 'Events', 'Logbook', 'Messages', 'Others', 'Profiles', and 'Administration'. Below the menu bar are several buttons: 'Contact List Keywords', 'Concierge Staff', 'Configuration Options', 'Exit', 'Event Types', 'Concierge Whiteboard', 'Palm® and Print Options', 'Query Master', 'Logbook Categories', 'Check Msg Center Usage', 'Interface Options', 'Profile Indicators', 'Manage Messages', and 'Create Your Own Map'. A language dropdown is set to 'English'. The main area is titled 'Concierge Staff' and includes a 'Show Message Groups' checkbox. A list of staff members is on the left, with 'Clayton Hale' selected. To the right of the list are fields for 'Concierge Name', 'Initials', 'Logon Name', 'Job Title', 'Message Group(s)', and 'Telephone'. Below these are checkboxes for 'Last Logon', 'Last Pw Change', and various permissions. A 'Message Groups' panel on the right shows a list of groups: 'AYS', 'BELL', 'CNC', 'FDESK', and 'Management'. A blue arrow points from the 'Message Group(s)' field to the 'AYS' group in the list. At the bottom are 'Save', 'Clear', and 'Delete' buttons.

**The Concierge Assistant - Support Profile - Thursday, August 24, 2006**

Contacts Events Logbook Messages Others Profiles Administration

Contact List Keywords Concierge Staff Configuration Options Exit

Event Types Concierge Whiteboard Palm® and Print Options Query Master

Logbook Categories Check Msg Center Usage Interface Options

Profile Indicators Manage Messages Create Your Own Map

English

**Concierge Staff** ☐ Show Message Groups

Administrator  
Alix Gray (Inactive)  
Brian Hutton (Inactive)  
Cameron Macdonald  
Chris Flanagan  
Christine Hagen (Inactive)  
Clayton Hale  
Clayton Hall (Inactive)  
Concierge manager (Authorized)  
Conny Classen (Inactive)  
Craig Kilshaw (Inactive)  
Dustin Sofonoff  
Emily Amos  
Francois Alexander  
Jordan Clarke (Inactive)  
Josh Forish  
Julian Peters  
Karen Clancy (Inactive)  
Katie Naylor (Inactive)  
Ken Kirkby (Authorized)  
Khanh Gurney

Concierge Name: Clayton Hale  
Initials: CMH  
Logon Name: Clayton  
Job Title: Concierge  
Message Group(s): AYS  
Telephone:   
Last Logon: 8/20/2006 Last Pw Change: 4/4/2006

Reset Logon Reset CC  
Additional Features


Authorized to Maintain the Concierge Manager: ☐  
Do Not Include in "All CA Users" Message Group: ☐  
Do Not Include in Concierge Selection Lists: ☐  
Status of this Concierge Staff Member is Inactive: ☐  
Can ONLY Access Restricted Logbook Types: ☐  
READ ONLY Permission for ALL Logbook Entries: ☐  
Language Only Entry (Not Concierge Staff): ☐

**Message Groups**  
AYS  
BELL  
CNC  
FDESK  
Management

Message Group:   
Replace With:   
Delete Add Group

Save Clear Delete

To make the passwords even more secure, in the Security Options set up by the Administrators, you can make users inactive; log users off after a pre-determined amount of time of not using the application, Inactivate the user after “X” number of failed logon attempts, and have the password change after “X” amount of days.



The screenshot shows the 'Configuration Options' dialog box with the 'Security Options' tab selected. The dialog has a title bar with a globe icon and a close button. Below the title bar is a header area with a globe icon and the text 'Configuration Options', and buttons for 'Close' and 'Save'. The main area contains a table of configuration options.

MapPoint Registry Values	Define Correspondence	Failed Logon Attempts	Profile CC Lookups	Logbook CC Lookups	
Default Values	Color Choices	Credit Card Types	Security Options	User Rights	Other Options
Inactivate User if No Logon in Last <input type="text" value="21"/> days Range is from 10 to 90 days					<input checked="" type="checkbox"/>
Logoff User if No Activity in the Last <input type="text" value="15"/> Minutes Range is from 10 to 60 Minutes					<input checked="" type="checkbox"/>
Inactivate User after <input type="text" value="3"/> Failed Logon Attempts					<input checked="" type="checkbox"/>
Enforce Strong Passwords A Strong Password is defined as: Minimum of 7 characters Maximum of 10 characters Must contain at least one alphabetic character Must contain at least one numeric character Must not contain the User Logon Name Must not reuse four previous passwords					<input checked="" type="checkbox"/>
Password must be changed every <input type="text" value="90"/> days Range is from 30 to 180 days					<input checked="" type="checkbox"/>



Each employee can be restricted to what they can or cannot see. If a certain employee should not have access to credit card information, by going into the employees profile the Administrator will be able to take that access away from the employee:

Additional Staff Information - Support Profile - Thursday, August 24, 2006

**Maintain Additional Staff Information**  
Clayton Hale

Language Skills | Security Authorizations | Logbook Categories

Optional - Clone Concierge Rights:  Clone Save

**The Tabs**

- ☒ Contacts (Required)
- ☒ Events
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- ☒ Messages
- ☒ Others
- ☒ Profiles
- ☐ Administration
- ☒ Maintenance

General | Contacts | Events | **Logbook** | Messages | Others | Profiles | Administration | Maintenance

<input checked="" type="checkbox"/> Add/Maintain Logbook Entry	<input checked="" type="checkbox"/> Send Logbook Messages	Check All
<input checked="" type="checkbox"/> Show Due and Overdue	<input checked="" type="checkbox"/> Print Logbook Details	
<input checked="" type="checkbox"/> Print Confirmations for Selected Guests	<input checked="" type="checkbox"/> Print/Email Vendor Service Request	Uncheck All
<input checked="" type="checkbox"/> Print Guest Itineraries	<input checked="" type="checkbox"/> Print/Email Guest Service Request	
<input checked="" type="checkbox"/> Show Logbook Messages	<input checked="" type="checkbox"/> Print/Email Guest Confirmation	
<input checked="" type="checkbox"/> Maintain Guest Notifications	<input type="checkbox"/> Decrypt Credit Card Number	
<input checked="" type="checkbox"/> Link to Profiled Guests	<input type="checkbox"/> Decrypt Profile Credit Card Numbers	
<input checked="" type="checkbox"/> Edit Guest Profile		
<input checked="" type="checkbox"/> Select Guest Profile		
<input checked="" type="checkbox"/> Deselect Guest Profile		
<input checked="" type="checkbox"/> Work with Reservations		
<input checked="" type="checkbox"/> Export Logbook Information		

This is to ensure that all employees only have access to the information that they require.

## Regularly Monitor and Test Networks

Track and monitor all access to network resources and cardholder data.

In the Concierge Assistant, all credit card information from both Logbook and Profiles is traced to the employee who retrieved the information from the system.

Logbook Credit Card Log:

The screenshot shows the 'Configuration Options' dialog box with the 'Logbook Credit Card Log' tab selected. The 'Sort by' options are 'Name', 'Date and Time', 'Concierge' (selected), and 'Workstation'. The table below lists logbook entries with columns for Logbook Name, Date and Time, Concierge, Workstation, and Reason. Below the table are radio buttons for 'Show All', 'Successful Attempts', and 'Unsuccessful Attempts'. A button 'Delete All Entries More Than 120 Days Old' is also present. At the bottom, it states 'Your current license will expire: 4/1/2010'.

Logbook Name	Date and Time	Concierge	Workstation	Reason
Clancy, Karen	2005/09/29 09:23	Karen Clancy	KAREN	Re Send to Vendor
Olson, Sandi	2005/12/22 11:22	Karen Clancy	KAREN	JLDKSJF
Olson, Sandi	2005/12/22 14:18	Karen Clancy	KAREN	For Person use
Olson, Sandi	2005/12/22 14:20	Karen Clancy	KAREN	lkijljkj
Olson, Sandi	2005/12/22 15:41	Karen Clancy	KAREN	personal use
Olson, Sandi	2005/12/29 09:28	Karen Clancy	KAREN	Personal use
Olson, Sandi	2005/12/22 11:22	Karen Clancy	KAREN	SDK.LSDMF
Olson, Sandi	2005/12/29 09:30	Karen Clancy	KAREN	more transpo
Olson, Sandi	2005/12/22 11:21	Karen Clancy	KAREN	sdkjlls
Olson, Sandi	2005/12/22 11:16	Karen Clancy	KAREN	For my own personal use
Olson, Sandi	2005/12/21 08:03	Karen Clancy	KAREN	aguire
Olson, Sandi	2005/12/21 08:05	Karen Clancy	KAREN	aspen
Olson, Sandi	2005/12/21 08:07	Karen Clancy	KAREN	aspen
Olson, Sandi	2005/12/21 09:28	Karen Clancy	KAREN	For Personal Use
Olson, Sandi	2005/12/22 11:16	Karen Clancy	KAREN	Because I want it

Profile Credit Card Log:

The screenshot shows the 'Configuration Options' dialog box with the 'Profile Credit Card Log' tab selected. The 'Sort by' options are 'Name' (selected), 'Date and Time', 'Concierge', and 'Workstation'. The table below lists profile entries with columns for Profile Name, Date and Time, Concierge, Workstation, and Reason. Below the table are radio buttons for 'Show All', 'Successful Attempts', and 'Unsuccessful Attempts'. A button 'Delete All Entries More Than 120 Days Old' is also present. At the bottom, it states 'Your current license will expire: 4/1/2010'.

Profile Name	Date and Time	Concierge	Workstation	Reason
Clancy, Karen	2005/09/29 06:46	Karen Clancy	KAREN	need to fax to vendor
Clancy, Karen	2005/09/29 06:45	Karen Clancy	KAREN	Need to fax to vendor
Clancy, Karen	2005/09/29 06:45	Karen Clancy	KAREN	Need to fax to vendor
Clancy, Karen	2005/09/29 06:44	Karen Clancy	KAREN	need to fax back to vendor
Clancy, Karen	2005/09/29 06:42	Karen Clancy	KAREN	Need to make a change
Clancy, Karen	2005/09/29 06:42	Karen Clancy	KAREN	need to fax back to vendor
Clancy, Karen	2005/09/29 06:42	Karen Clancy	KAREN	need to fax back to vendor
Clancy, Karen	2005/09/29 06:42	Karen Clancy	KAREN	Need to make a change
Clancy, Karen	2005/09/29 06:42	Karen Clancy	KAREN	Need to make a change
Wilson, James A	2005/09/29 06:55	Karen Clancy	KAREN	Need to fax to vendor
Wilson, Jessica	2005/09/29 06:50	Karen Clancy	KAREN	I need to give to RM Service
Wilson, Jessica	2005/09/29 06:48	Karen Clancy	KAREN	Vendor inquiry
Wilson, Jessica	2005/09/29 06:47	Karen Clancy	KAREN	need to send copy to customer
Wilson, Jessica	2005/09/29 06:47	Karen Clancy	KAREN	need to send copy to customer
Wilson, Jessica	2005/09/29 06:47	Karen Clancy	KAREN	need to send copy to customer

### **Maintain an Information Security Policy:**

The following is a list of the basic elements of a good information security policy:

PCI Data Security Standard	
Build and Maintain a Secure Network	Install and maintain a firewall configuration to protect data Do not use vendor-supplied defaults for system passwords and other security parameters.
Protect Cardholder Data	Protect stored data Encrypt transmission of cardholder data and sensitive information across public networks.
Maintain a Vulnerability Management Program	Use and regularly update anti-virus software Develop and maintain secure systems and applications
Implement Strong Access Control Measures	Restrict access to data by business need-to-know Assign a unique ID to each person with computer access Restrict physical access to cardholder data
Regularly Monitor and Test Networks	Track and monitor all access to network resources and cardholder data Regularly test security systems and processes
Maintain an Information Security Policy	Maintain a policy that addresses information security

For more CISP information please refer to our Best Practices - Credit Card Encryption, which can be, used as a training document for your staff members.

For more technical information regarding The Concierge Assistant, please refer to our IT Memo.