

Enhanced Security Modules

PG Calc's Enhanced Security Modules enable customers to meet the most demanding of enterprise and IT security requirements.

The Enhanced Security Modules will:

- Ensure your security compliance.
- Give you a variety of security feature choices.
- Enable compliance with industry standards.
- Be available stand-alone or in a bundle.
- Be easily configured and implemented.

PG Calc's software is the industry standard for online planned gift illustrations (*PGM Anywhere*) and administration (*GiftWrap* and *Bequest Manager*). As such, they incorporate state-of-the-art security features in their architecture design, including:

- Base pages that authorize page-level access for each web page
- Encryption of all web requests using Transport Layer Security (TLS) encryption
- Verification of all user-entered data for malicious script insertion
- Parameterized stored procedures and input parameter validation to protect against SQL injection

PGM Anywhere and *GiftWrap/Bequest Manager* have three levels of data encryption, providing a strong deterrent against unauthorized access to data. In addition to full-disk encryption the databases are encrypted using Microsoft's Transparent Data Encryption (TDE), making database files unintelligible to an unauthorized person. TDE is tied to the specific server where the database resides.

Data identified by the GDPR as sensitive (e.g. bank account number, social security number, and date of birth fields) is also encrypted. This field-level encryption ensures that sensitive information remains encrypted, even when viewed outside the application by staff with authorized access to the database. This second key is stored in a database on a different server, thus greatly reducing the likelihood a hacker would be able to get both keys.

As a PG Calc software user, you can be confident that your valuable donor data is secure and will retain its integrity. However, there are times when compliance requirements demand more. That solution is the Enhanced Security Modules. These are optional modules comprising a series of stand-alone security features that will enable you to meet the most stringent of security requirements.

Enhanced Security Modules

The Enhanced Security Modules comprise a collection of functions that separately and in the aggregate enhance overall *PGM Anywhere* and *GiftWrap/Bequest Manager* security. Enhanced Security Module functions include the following:

- Application and Data Hosting Options
- Single Sign On (SSO)
- Two-Factor Authentication
- IP Filtering
- Identity Access Management (IAM) Data Feeds
- Enhanced Data Masking (*GiftWrap*)
- Secure Key Management
- Feature Suppression (*PGM Anywhere*)

Everything you need to manage your planned giving application security.

Note that Enhanced Security Module functions are separately priced, and can be purchased in bundles, or on a stand-alone basis. Pricing is discounted when security modules are enabled for a second product, listed as “Second Application” in each section below.

Hosting Options

Both the *PGM Anywhere* shared application platform and the *GiftWrap/Bequest Manager* shared application platform incorporate a number of features that ensure overall data security. However, for those customers that require enhanced data or application segregation, we offer the following hosting options:

- **Silver Level Hosting** - Customer data is maintained in a separate database on the hosted database server. Silver Level hosting allows for the partitioning of an individual customer’s data into a database that is physically separate from the shared database on the same physical server with other PG Calc software databases.
Pricing: First Application Setup \$1,750; Annual \$4,500 | Second Application Setup \$750; Annual \$1,800
- **Gold Level Hosting** - Customer data is maintained on a separate physical database server, with a dedicated database instance and database. This configuration allows for the partitioning of customer data into an operating environment that is physically separate from the shared PG Calc software operating environment. This customer database and database instance will be installed on a separate virtual server from the shared PG Calc software database. Access to the application is provided through a shared application server.
Pricing: First Application Setup \$3,500; Annual \$25,000 | Second Application Setup \$1,500; Annual \$10,000
- **Platinum Level Hosting** - The software application and data are hosted on dedicated servers. The application is maintained on a dedicated application server, and as such, customers have access to a dedicated instance of the application. Customer data is maintained on a dedicated virtual database server, with a dedicated database instance and database. This configuration allows for the partitioning of the application and customer data into an operating environment that is separate from the shared PG Calc application and customer data operating environment. This application and customer database and database instance will be installed on dedicated virtual servers separate from the shared application and database on production. In the event of a DR scenario the application and database servers will be shared until regular production is resumed.
Pricing: First Application Setup \$3,750; Annual \$50,000 | Second Application Setup \$1,500; Annual \$20,000
- **Double Platinum Level Hosting** - The software application and data are hosted on dedicated servers. The application is maintained on a dedicated application server, and as such, customers have access to a dedicated instance of the application. Customer data is maintained on a dedicated virtual database server, with a dedicated database instance and database. This configuration allows for the partitioning of the application and customer data into an operating environment that is separate from the shared PG Calc application and customer data operating environment. This application and customer database and database instance will be installed on dedicated virtual servers separate from the shared application and database both on production and in a DR scenario.
Pricing: First Application Setup \$4,250; Annual \$50,000 | Second Application Setup \$2,700; Annual \$20,000
- **User Acceptance (Test) Server** -- Dedicated server for user acceptance testing.
Pricing: First Application Setup \$5,000; Annual \$8,000 | Second Application Setup \$2,000; Annual \$3,200

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Single Sign-On (SSO)

Single sign-on (SSO) provides the capability to authenticate once, typically via an application portal, and be subsequently and automatically authenticated when accessing target applications, such as *PGM Anywhere* or *GiftWrap/Bequest Manager*. With this feature, the authentication process is integrated into the SSO infrastructure of the client organization, based on the SAML 2.0 standard. Once a user is logged in to their enterprise application portal, they may access PG Calc software without explicitly entering a username and password.

Pricing: First Application Setup \$2,000; Annual \$1,000 | Second Application Setup \$500; Annual \$500

Two-Factor Authentication

Two-factor authentication enhances software access security by requiring users to provide two methods (also referred to as factors) to verify their identity. These factors include something the user knows - username and password, plus something the user has – a smartphone or cell phone, a dedicated landline, a tablet, or a hardware token. When two-factor authentication is enabled, users must enroll upon first login, during which the user can select among phone call, text message, or push as their preferred method of receiving the numeric key required for login. This feature is set up and turned on and off in the application on a per-user basis, and can be configured to apply authentication once per day, based on a configurable number of hours, or with each login.

Pricing: First Application Setup \$250; Annual \$860 for the first 5 users, \$360 per additional blocks of 5 users
Second Application Setup \$100; Annual based on blocks needed for additional unique users
Optional hardware tokens are available for \$20 each.

IP Filtering

The IP address filtering feature allows for the filtering of source IP addresses upon user login. When logging in the user will be validated in the usual fashion. With the IP filtering feature configured and turned on, the system will additionally validate against a configured list of source IP addresses. Each subsequent page request will authenticate against the configured list of source IP addresses. If no entries are made, the login request would be blocked.

Pricing: First Application Setup \$250; Annual \$500 | Second Application Setup \$100; Annual \$200

Identity Access Management (IAM) Data Feeds

This function comprises a custom data feed, in the form of a plain text file, that provides updated user access data from the database for import into enterprise IAM systems at the customer site. The IAM Data Feed enables enterprise IAM systems to remain current specifically with respect to user access data, ensuring only authorized access to the application. Implementation of the IAM Data Feed typically requires specification of data element to be included in the feed, and is delivered in the form of plain text files (e.g., CSV or XML) via secure FTP.

Pricing: First Application Setup Custom/Client \$2,500; Annual \$1,500
Second Application Setup Custom/Client \$1,000; Annual \$600

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Enhanced Data Masking for *GiftWrap*

With the *GiftWrap* enhanced data masking feature, confidential data, including Social Security numbers, bank account numbers, and dates of birth, can be fully masked on all *GiftWrap* UI screens. In addition, Social Security numbers and bank account numbers are fully masked on all report previews rendered in the browser. Masking functionality is configurable at the Role level, enabling this functionality to be modified as desired by the customer.

When screen masking is turned on, sensitive data will be masked in the *GiftWrap* UI screens. When report masking is turned on, sensitive data is masked in the report preview window which appears in the browser. Exported and PDF versions of the report may contain unmasked sensitive data if the user has bypassed the report viewer and has access to view sensitive data on reports.

This feature also supports partial masking on PDFs for 1099s, etc. This option will display data fully masked if displayed in the report viewer, and data partially masked if displayed directly to a PDF or CSV document. Changing from full Enhanced Masking to Partial Enhanced Masking is done by PG Calc.

Pricing: Setup - \$250; Annual - \$500

Secure Key Management

As part of the standard security features of PG Calc software applications, all client data associated with the application is stored in the database in encrypted form. In addition, database fields that store sensitive information, like account numbers and Social Security Numbers, are encrypted a second time, using a randomly generated GUID (Globally Unique Identifier), a 32-character alpha-numeric string. For those organizations that desire the next level of encryption security, we offer Secure Key Management.

Secure Key Management allows PG Calc software clients to benefit from encryption key management external to the application. Separating the management of encryption keys to a Hardware Security Module (HSM) helps ensure the integrity of encryption keys used by the application to encrypt client data. As such, sensitive application data remains secure even in the unlikely event of a breach.

Secure Key Management is based on Amazon Web Services (AWS) Key Management Service (KMS). AWS KMS makes it easy for the software applications to create and manage encryption keys and to control the use of encryption within the software applications. Encryption keys are random and unique strings created explicitly for encrypting and decrypting data. AWS KMS is a secure and resilient service that uses FIPS 140-2 validated hardware security modules to protect encryption keys.

Secure Key Management also employs the AWS Secrets Manager, which enables PG Calc software to easily rotate, manage, and retrieve database credentials.

Pricing: First Application Setup - \$2,500; Annual - \$1,500 | Second Application Setup - \$1,000; Annual \$600

Feature Suppression in *PGM Anywhere*

Upon request, PG Calc can disable certain features of *PGM Anywhere* to meet compliance requirements. These include blocking the ability to: enter Social Security numbers (SSNs), save cases in the database, export presentations in any format (pdf, docx, xlsx, inpx, or gftx/biox), or email presentations from within *PGM Anywhere*.

Feature suppression options are available to clients free of charge.

For more information on these security features contact PG Calc at 888-474-2252, or support@pgcalc.com.