



protel Air HTML5

Creating and editing users

User Guide

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About protel documents

Symbols used in this documentation

- ▼ Background information and notifications about additional information
- ▼ Please note: Important!

Please check:
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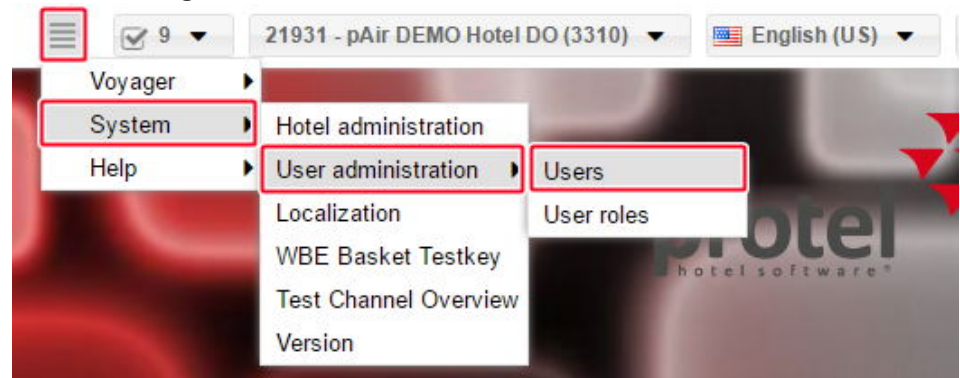
Introduction

The following user guide describes how to create new users for your protel Air hotel software. If you have any questions, please contact Cloud-Support@protel.net.

protel Air's user administration consists of two components:

1. User management HTML5

HTML5 User administration:
Stack menu ☰ → System → User administration:



HTML5 user administration controls access to all Front Office functions available in protel Air HTML5. That includes all functions which can be accessed from the main menu:

protel Air HTML5: Main menu in the menu bar



The **system data** is an exception:



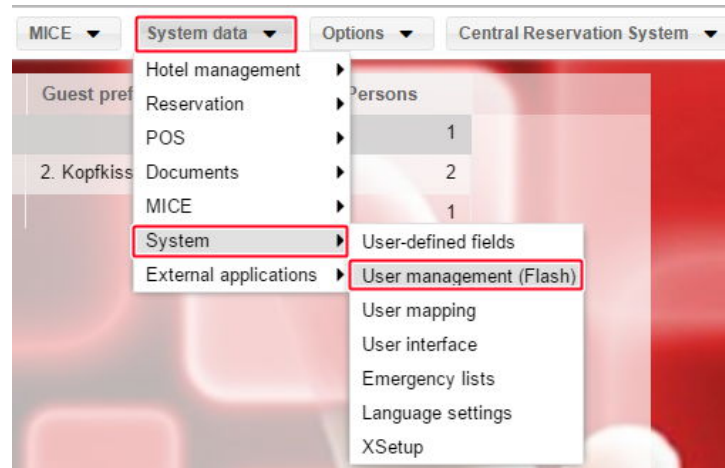
Because the newly developed HTML5-Client does not contain the comprehensive system data management, a large portion of the system data will continue to be managed in Flash Client. This is also the reason why users in Flash Client will need to continue to be managed parallel to HTML Client - see next section.

📄 Learn more about creating HTML5 users in section [Create HTML5 user](#).

2. User management Flash

Opening Flash User Management in HTML5-Client:

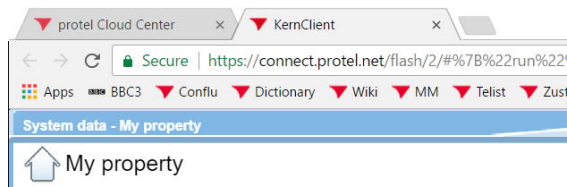
System Data → System → User Management (Flash)



The Flash user management helps you manage which employees are allowed to have access to the Flash system data¹. The Flash system data provides protel Air with the fundamental data of the hotel (e.g., rooms, rates, items, etc.). In the further course of development, the Flash system data will be eventually implemented into HTML5 client. Until the end of this implementation phase, you will be managing your protel Air system data mainly in Flash-Client.

📘 Learn more about creating HTML5 users in section [Creating Flash user](#).

¹From HTML5-Client, you open the Flash system data by means of the **System data** menu (e.g. **System data** → **Hotel management** → **My property (Flash)**). The Flash system data open up in their own browser tab (see figure below). By clicking on the "protel Cloud Center" tab, you can switch back to HTML5-Client.



Creating HTML5 user

Log into your protel hotel software.

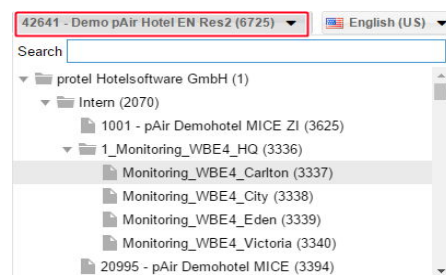
Note

The user with which you are logging in must have protel Air administrator rights, i.e., they must have been assigned the **pAir Kundenadminrolle** (pAir Customer Admin role).

Select hotel

If you are using protel Air for several hotels, select the hotel in the upper right part of the window for which you would like to create the HTML5 user.

Selecting the hotel in HTML5-Client

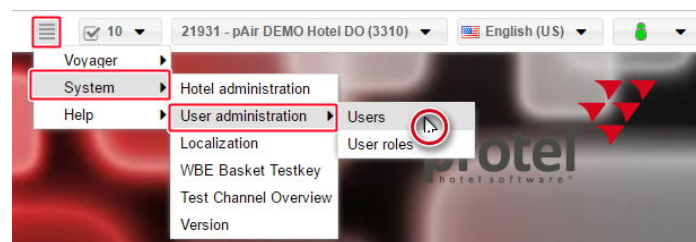


Only the hotels that your user has access to will be displayed here.

Let's get started!

Right-click to open the stack menu and click on **System** → **User administration** → **User**

System → User administration → User roles



↳ In doing so, you will navigate to an input mask to manage the new user.

Click on the **[Add]**.

↳ A window then appears for you to enter the user data.

active

The **"active"** checkbox located at the upper right corner of the window is automatically set.

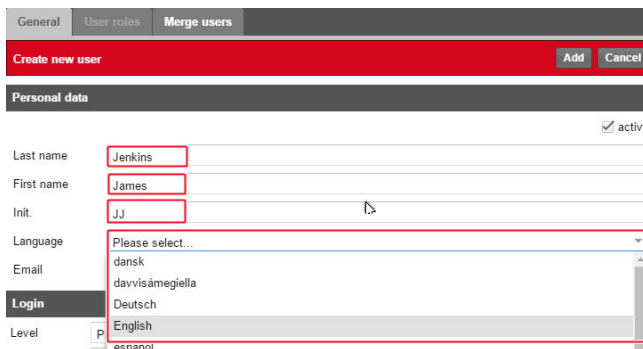
If you would like to release the user at a later time, unselect the checkbox.

active

Enter the **last name**, **first name**, and **initials** and select a **language** for the user.

System → User administration → Users → Create new user [Add]:

Enter personal information




In the next field, you will need to enter the **email address** for the new user (please do not use any group addresses such as reception@myhotel.net).

↳ If you enter an email that has already been entered into the system, the address field will be marked in red. An email address can only be entered into the system once. An email containing the login data will then be sent to the email address you have entered.

Level: Select the "Customer" level for the user.²

System → User administration → User → Create new user [Add]:
Enter login data / assign customer level



Hotels: Select the hotel to which the user is to have access to by clicking on the selection button . If your hotel is part of a hotel chain, you can make it possible for the user to have access to numerous hotels³.

System → User administration → User → Create new user

The user should be able to log into these hotels (multiple selection only possible with hotel chains)



Click on **[Save]** to confirm the selection.

Def. Hotel: The user's default hotel (the hotel which opens when starting protel Air) can only be changed after the user has been created (see further down).

User name: This is where you enter the name the used by the user to log into protel Air.

²Being a protel Air user, you only have access to the client level. There are other levels with additional permissions to which only protel support and protel business partners have access.

³Using the **[Select Recursive]** button, select all the hotels from a hotel group. If a new hotel is added to the group, the user can also automatically access this hotel. This would not be the case if the hotels were selected individually rather than via the **[Recursive]** button.

After you have finished filling in all of the fields, click on **[Add]**:



Note

Please wait a few seconds until the new users appear in the user list to the left! Please do not click any additional elements until the window has updated itself. Should the user not appear in the window after a few seconds, reload protel Air in your browser (Ctrl + 5) and reopen the user administration.

Afterwards you can also adjust the default hotel for the user - if necessary:



The default hotel is the hotel to which the user is automatically logged into (only relevant for more than one hotel).

Registration Email

After you have entered all of the necessary data, an email will be sent to the employee's email address. The email contains the login link for protel Air and the login data (username and password).

After the first login, the user will be required to enter a new password.

The password must contain at least seven characters and must consist of numbers and letters.

The next steps...

- Assign the HTML user a suitable user role
 - ↳ see section on [Assigning user roles](#)
 - Hint: Create exclusive user roles
 - ↳ see section on [Creating and editing user roles](#)
- For each HTML5 user a corresponding Flash user is automatically created. The Flash user is required to grant or deny your users access to certain system data areas. Determine which part of the Flash system data the user is allowed to access.
 - ↳ see section [Flash User](#)


Creating and editing user roles

A user role consists of several privileges which are usually issued together. A user can have several user roles and have several roles in various hotels.

Privileges are single rights for reading, changing, and deleting data.

Let's get started!

Log into your protel Air hotel software and select the right hotel (if there is more than one).

Right-click to open the Stack menu  and then proceed as follows: **System**
→ **User administration** → **User roles**.

↳ A window opens containing an overview of all of the user roles.

You can either use the predefined protel rolls or use a hotel-specific role. The following roles are relevant for protel Air:

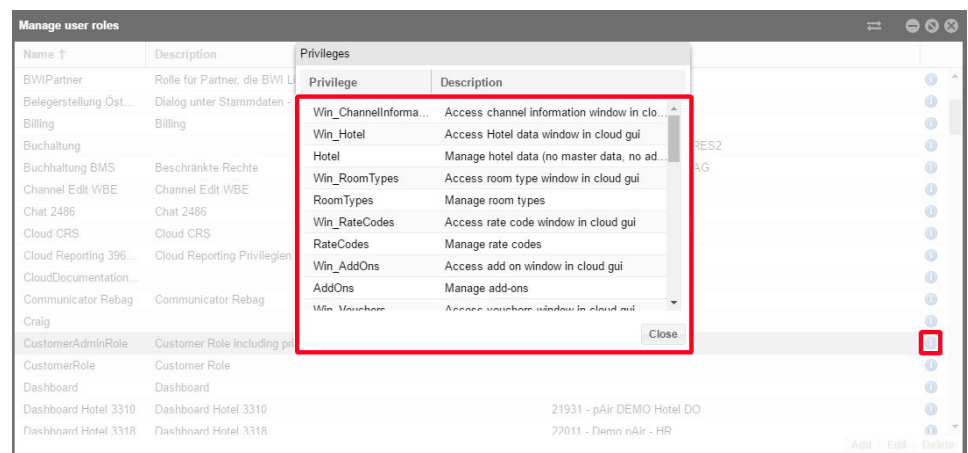
- **pAir Kundenrolle (= pAir customer role):** The protel Air Customer Role releases the protel Air menu bar
- **pAir Kundenadminrolle (= pAir client admin role):** Releases the protel Air menu bar and allows the employee to create new users. This role is meant to be used by the hotelier or the hotel manager. It allows you to assign the "CustomerAdminRole" to additional employees.
- **PAir Front Office:** Access to all the Front Office functions (even new ones). By default, this role encompasses all privileges and CANNOT be edited or changed. Users with this role automatically have access to newly developed functions!
- **Dublettenkontrolle (= Match and merge):** Manages access to the guest profile menu point → Match & Merge (merge two identical guest profiles).
- **PciTokenize⁴:** Is required to encrypt credit card information (only for select users!)
- **PciDetokenize:** Is required to encrypt credit card information in the so-called "detokenizer" (only for select users!)
- **pAir MICE Menü Rolle (= pAir MICE Menu Role):** Manages access to MICE (only when using protel Air MICE as an add-on subject to charge).

⁴ protel Air complies with the provisions laid down by the Payment Card Industry Data Security Standard (PCI DSS). A central PCI DSS regulation is the prohibition of saving unencrypted credit card information at the hotel. Credit card data will therefore be replaced in protel by a so-called token - an artificial replacement number. This is done by the protel Tokenizer which acts like a layer of insulation between protel Air and the various locations where credit card information is entered. It will capture all of the credit card information coming in from the entry point and replace it with a "token".

- **Cloud CRS:** Manages access to the "Central Reservation System" dialog box.
- **Customer Role:** Optional. Only required in combination with the *Cloud CRS* role and/or the *WBE5* add-on. Manages access to the configuration dialog boxes for the "Central Reservation System" and the configuration dialogs for the *WBE5*. This role should only be given to users who have the **pAir client admin role**.
- **Messenger Role.** Only required in combination with the *WBE5* add-on. Manages the access to the configuration dialogs for *protel Messenger* (add-on for automatic message delivery, is only used in combination with the *WBE5* add-on).

These roles are default roles which cannot be changed! Clicking on the Info icon enables you to see which privileges are connected to the individual roles.

Example:




Adding hotel-specific user roles

If you would like to set up a user role for your hotel or your hotel group, click on **[Apply]** in the **Manage user roles** dialog box.


↳ The window for adding user roles opens.

In the **General** tab, enter the name and a short description for the new user role.

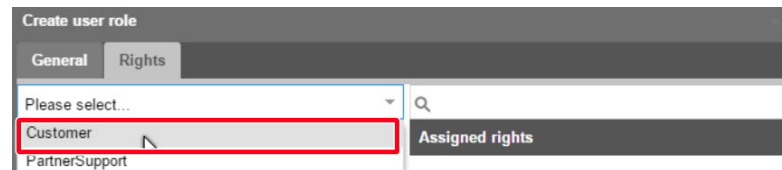
Stack menu  → System → User administration → User roles → [Add]




Then, switch to the **Rights** tab. Here, select the **Customer** level⁵.

Stack menu  → System → User administration → User roles → [Add]

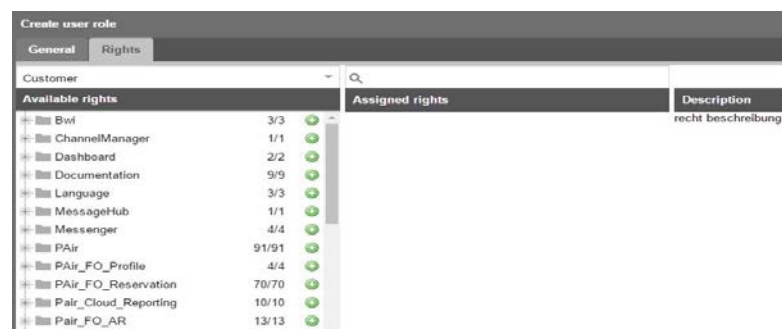
Rights: **Customer-Level**



↳ You will then receive a listing of the available rights.

Stack menu  → System → User administration → User roles → [Apply]

Rights: Customer-Level - **Available rights**

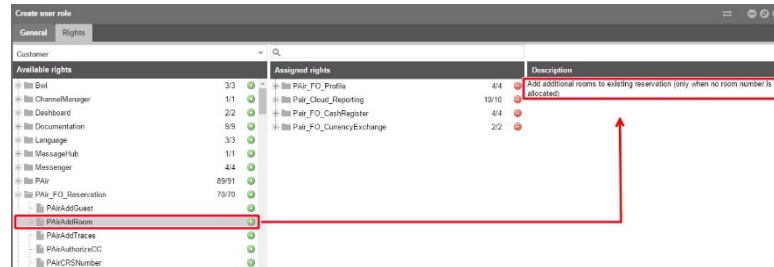


Click on the **+** symbol located to the left next to the description of the rights to open the individual privileges.



When you select a privilege, you will see a description of the privilege to the right of the window - see next figure.

Privilege description



You can either assign entire files containing all of the privileges, or select them individually:

Select a file or a subordinate privilege and click on the green plus sign.

↳ The selection is adopted in the **Assigned rights** column in the middle.

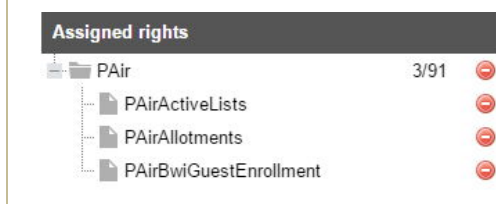
Assigning is made even easier with the Drag & Drop function:

Select a file or privilege and drag it into the middle column by keeping your mouse key depressed.

Suggested procedure:

To keep things easy, assign an entire file and remove the individual privileges by clicking on the red minus sign or use the mouse to drag the privilege to the left.

↳ You will notice that the total number of privileges which have been assigned is displayed next to the file:



User administration → User roles
→ Number of assigned rights

Once you have assigned all of the desired rights, click on the [Save] button in the lower right section of the dialog box.

↳ The new user roles appear in the overview. Unlike with pre-configured roles, the hotel-specific role is located in the **Hotel** column showing for which hotel or hotel group the role is available (see next figure):

User administration →
User roles: A hotel is entered for hotel specific user roles

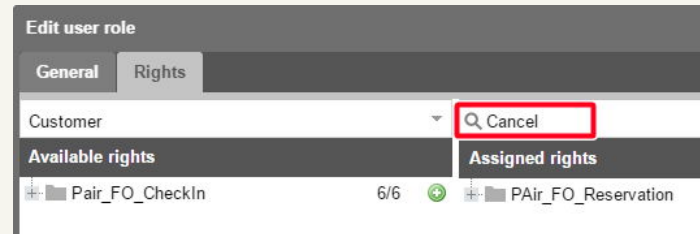


The new user role is always assigned to the hotel or the hotel group you selected in the HTML5 client (see the section above about **Selecting hotel**). Therefore it is recommended that you pay attention to which hotel is selected in the upper right corner of the browser when applying new roles.

▼ **HINT:** Use the search function!

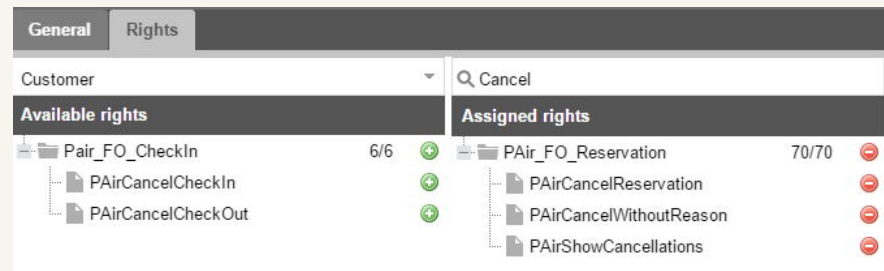
You can explicitly search for certain privileges.

Enter a word into the search field, such as "Cancel".



You will then be shown all of the files which contain the privilege that matches the search word you entered.

Open the file by clicking on the plus sign + and you will be shown the privileges (for the available *and* assigned rights).



Editing hotel-specific user roles

Hotel specific user roles (i.e., internally generated) can be subsequently edited. Select the role in the **Manage user roles** dialog ⁶ and click [**Edit**].

Assign rights

To assign a right, you will need to select it in the **Available privileges** column and use Drag & Drop to pull it to the **Assigned privileges** column in the middle.

Remove assigned privilege

To remove a right, you will need to select it in the **Assigned privileges** column and use Drag & Drop to pull it to the **Available privileges** column to the left.

↳ **The privilege change has an effect on all of the users working with the privilege!**

⁶ Stack menu  → System → User administration → User roles

Assigning user roles

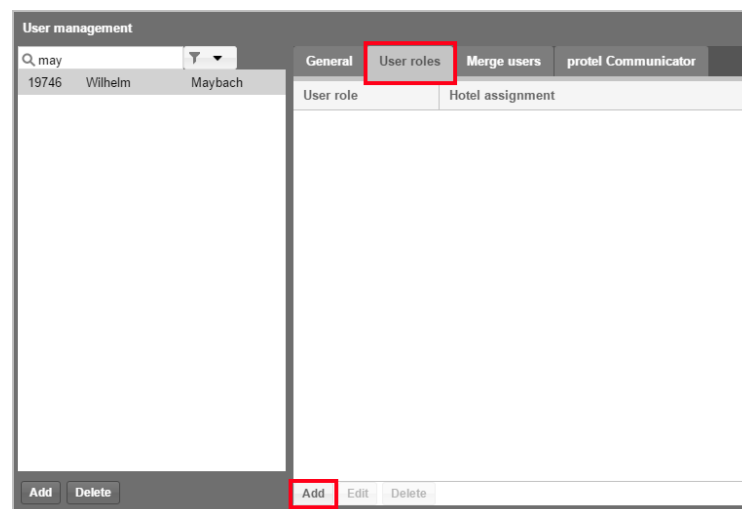
Each (new) protel Air user will need to be assigned certain user roles. The role determines which parts of the program the user will be able to access.

Open the Stack menu  and then click **System** → **User administration** → **Users**.

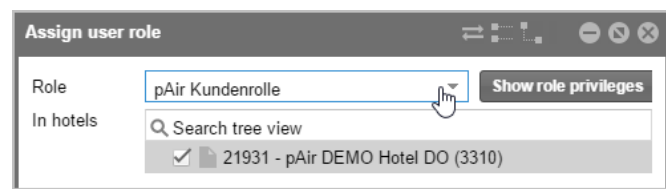
In the left part of the window, select the user for whom the user role is to be assigned.

Click on the **User roles** tab and then on **Add**.

System → User administration → Users → User roles tab → Apply



In the next window, select the "Role" selection list - see figure.



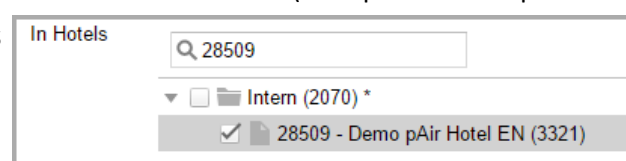
① To find out more about roles relevant to protel Air, [see above](#) (page 10 f.) In addition to that, you have access to internally generated roles.

The standard protel Air user should at least be given the **pAir Kundenrolle (pAir client role)** - or an internally generated role based on it.

Select a desired role from the selection list (e.g., **pAir Kundenrolle**).

Then, by clicking in the checkbox, you select the hotel in which the user is to have access to the role (multiple selection possible when necessary).

System → User administration → Users → User roles → Hotel allocation



Click on **[Save]** and close the window.

After saving, the role will appear in the overview of the **User roles** tab with the respective hotel.

▼ **Note**

You will need to allocate at least one user role for each newly created user. If the user hasn't been assigned a role, he will not be able to login to protel Air. Instead, he receives the following message: "User does not have any privileges".

Flash user

The Flash user administration helps you manage which employees are allowed to have access to the Flash system data. The Flash system data supplies protel Air with the hotel's fundamental data (e.g., rooms, rates, items, etc.). In the further course of development, the Flash system data will be eventually implemented into HTML5 client. Until the end of this implementation phase, you will be managing your protel Air system data mainly in Flash-Client.

▼ Please note

When creating a new HTML5 user, the corresponding Flash user is automatically created. The Flash user is needed to control your employee's access to certain system data areas.

For security reasons, newly created Flash users DO NOT have access to the Flash system data.

Therefore, if the user is to have access to the system data, you have to assign the relevant user rights. To do so, log into protel Air as an administrator and open the user administration (System data > System > User management (Flash)). Then assign the desired rights to the user.

▶ See the following section

Assigning permissions for Flash system data

Determine which users are going to get access going to a certain system data area, and which users are going to be denied access.

In the left side, select a user which you would like to edit.

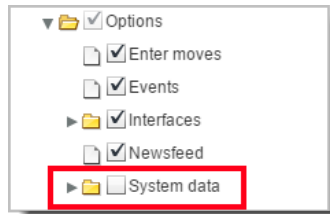
1. Open the tree-view and click on the little triangle ▶.



2. Open the **Processes** folder and click on the little triangle ▶.
3. In the same manner, open the **Options** folder and afterwards the **System data** folder.

Via the **System data** folder, you can control which system data areas a user is to have access to.

- If the checkbox in front of the name of an area contains a check, it means that the user has access to that area.
- If you remove that check, the user will have NO ACCESS to that area.
- If a user is not to have any access to the entire Flash system data, remove the checkmarks from the system data folder - see figure:



- If a user is to have access to the entire Flash system data, put a checkmark in the system data folder.

Exclusively set up the privileges for each user.

▼ **Note**

All other privileges that you can suspend in the Flash User Administration, are **IRRELEVANT** for working in the HTML5 client!

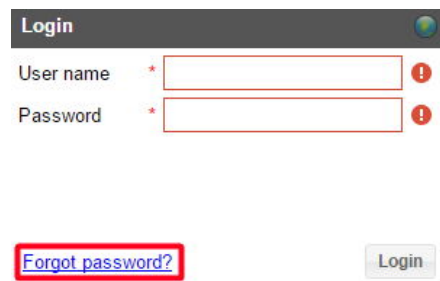
Login data

Each newly created HTML5 user receives an email confirmation. The email is sent to the email address that was entered into the user administration and contains a login link for protel Air and the login data (username and password).

After the first login, the user will be required to enter a new password. The password must contain at least seven characters and must consist of numbers and letters. The user will then be automatically logged into his default hotel.

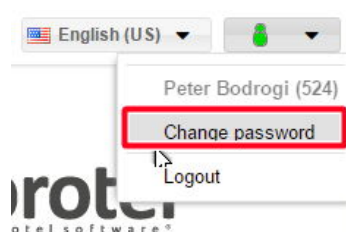
If the user forgets his password, a new password can be sent to the user's email address via the "Forgot your password?" function.

protel Air Login-dialog box →
Access the "Forgot your password?"- Function



In accordance to security provisions, the password will need to be changed every 90 days. 20 days before the 90 days are over, you will receive a message informing you that your password is going to expire. If you want to change your password because you received this message, or you have a new user account, or you simply want to change the password, then click on the user icon located in the upper right corner of your browser window and click on [Change password].

Access the "Change password" function in protel Air



Things to pay attention to after every protel Air update

Almost every update has new user rights.

↳ Check the **protel Air Update-News** to see if the update contains new user rights. Each new right is automatically contained in the **pAir Front Office** role (exception being the update news explicitly tell you about respective exceptions).

▼ If a user with the **pAir Front Office** role *should not* have access to a newly added right, proceed as follows:

1. Create a new user role (see section **Creating and editing user roles**). Assign the role all of the privileges which the user is to have.
2. Assign the user the newly created role (see section **Assigning user roles**).
3. Remove the old **pAir Front Office** role for the user as follows:
 - Select the user and open the **User roles** tab.
 - Select the **pAir Front Office** role and click on **[Delete]**.

▼ If a user is to have access to a newly added right with the **pAir Front Office** right, you will not need to do anything because the pAir Front Office role automatically contains all of the newly developed right (should there be exceptions to this rule, the **protel Air Update-News** will provide you with the necessary information).

▼ If a user with a **hotel specific** role is to have access to the new right, you will need to edit the role and assign the new right.

▼ If a user with a **hotel specific** role does not have access to a newly added right, you will not need to do anything.

User mapping

For every protel Air HTML5 user there is a corresponding Flash user. Both users are linked to each other.

▼ Please note

In older protel Air versions (before June 2018) the HTML5 and the Flash user still had to be linked by hand. Meanwhile, the Flash user is automatically created and linked to the associated HTML5 user, so no further action is required.

The User mapping shows you which users are linked to each other.

1. Log into your protel Air hotel software and select the suitable hotel (if there is more than one).
2. Open the **System data** menu and click on **System → User mapping**.

↳ On the left side (Login column) you can see all users created for the hotel in the protel Air Flash system data. The linked HTML5 user on the right side (Cloud user column) is granted the according user rights for the Flash system data. The user mapping also ensures that the correct user is displayed in the action log. If you do not map the user, the "Admin" user will always appear in the action log.

Contact

If you have questions about the described procedures or simply would like to know more about protel Air HTML5 Client, feel free to contact us! We're here to assist you!

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