Overview

In this guide, "users" refers to those who log in to Kaui to perform actions (add a charge, generate a dry-run invoice, etc.). However, other parts of the documentation also use the term "user" when referring to users of the API.

In order for users to be able to log in and perform tasks in Kaui, you need to create a user profile for each one.

This section explains how to manage users in Kaui, which includes:

- Creating and editing new users
- Assigning roles and tenants to users
- Adding new user roles

This section assumes that you can log in as a Kaui admin or as a user with the correct permissions for working with users, roles, and permissions.

Additional Resources

For additional information on managing users, roles, and permissions in Kill Bill, see the following:

- Users, Roles, and Permissions Management
- Multi-Tenancy and Authorization
- List of user permissions

Managing Users with a Third-Party System

If you are managing users with a third-party system, all that's required in Kaui is to add the username per the Add a User section.

Managing Users with Kill Bill

If you are managing users with the Kill Bill database *or* solely with the `shiro.ini` file, first define the users and roles as described in Users, Roles, and Permissions Management. Then, in Kaui, you must create the same users, passwords, etc. For more information, see Add a User and Edit a User.

Before You Begin

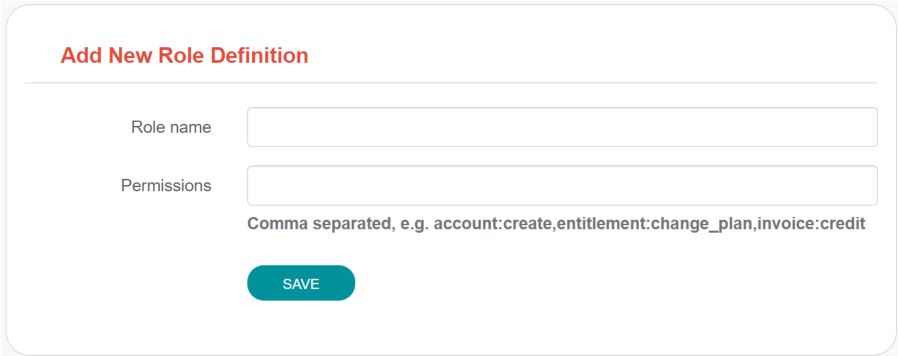
If your organization uses a third-party system, such as LDAP, Okta, or Auth0, to manage Kill Bill users and roles, first configure them in that system, then add them in Kaui. For more information, see Users, Roles, and Permissions Management.

If you are using the Kill Bill database to store user data, adding a user profile to in Kaui automatically creates it in Kill Bill. **NOT SURE ABOUT THIS

Create a New User Role

The role(s) assigned to a user define what tasks the user can perform in the system (for example, perform a chargeback or add a custom field).

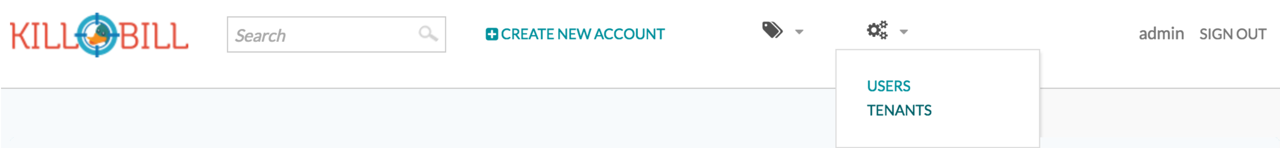
1. Open the Add New Role Definition screen, either from the User Update screen (see Edit a User) or by accessing `https://demo.killbill.io/role_definitions/new`.



2. Enter the **Role name** for the user. Do not use any spaces in the role name.
3. Enter all the **Permissions** that are associated with this role. See the list of Kill Bill user permissions as a reference.
4. Click the **Save** button.

Add a User

1. On the homepage, click the gears icon at the top of the screen.

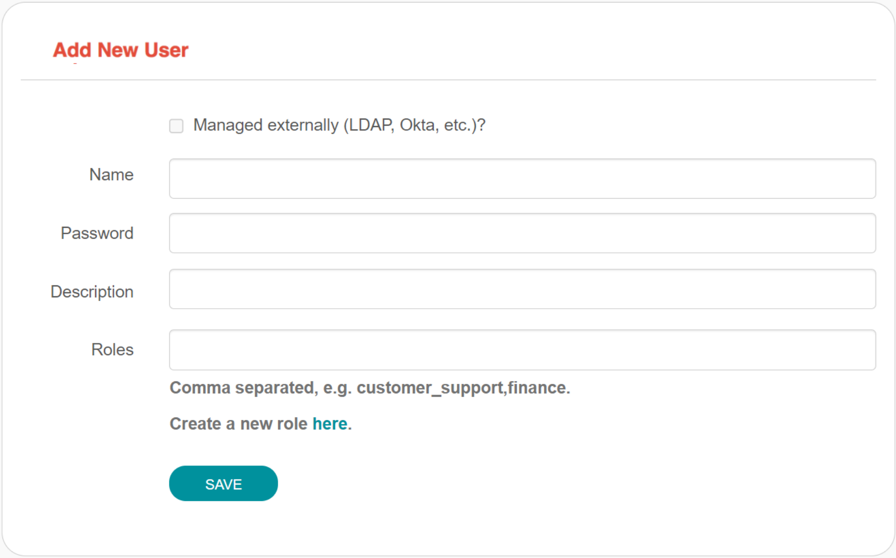


2. Select **Users.**

   Kaui displays [SOMETHING]. *I don't have access to this screen.*

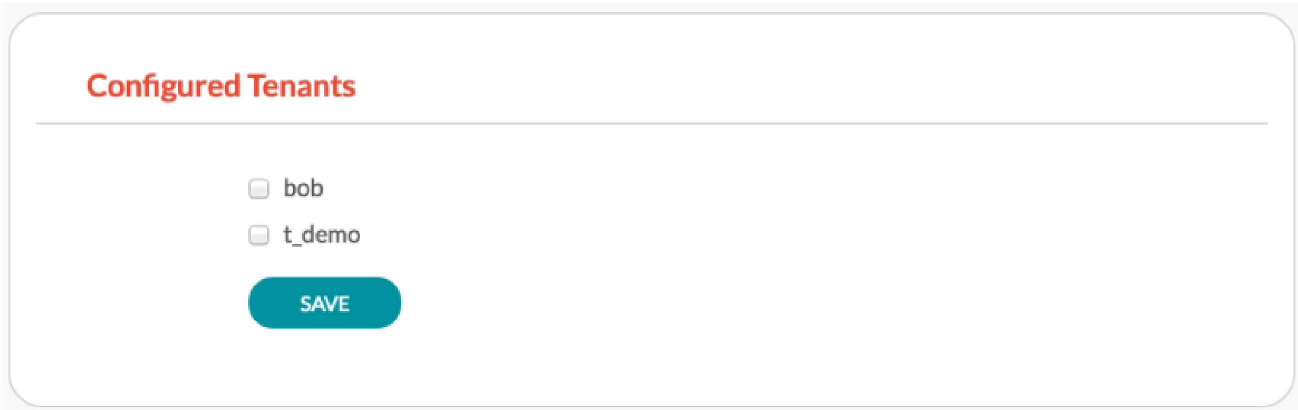
3. Select [SOMETHING ELSE].

   Kaui displays the Add New User pop-up:



NOTE	**Note:** You can also open the Add New User screen by clicking on the username and tenant name in the upper right corner and clicking the plus icon ( ) next to "Allowed Users."

4. Fill in the fields. For field descriptions, see Add New User Field Descriptions.
5. Click the **Save** button.
6. CONFIGURE TENANT STEP HERE?



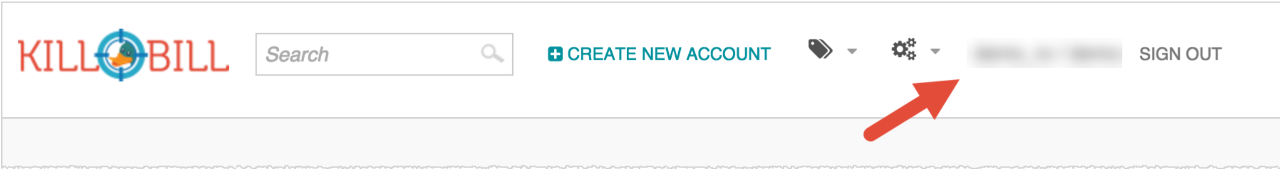
+ . Select the tenant(s) the user has access to. . Click the **Save** button.

Edit a User

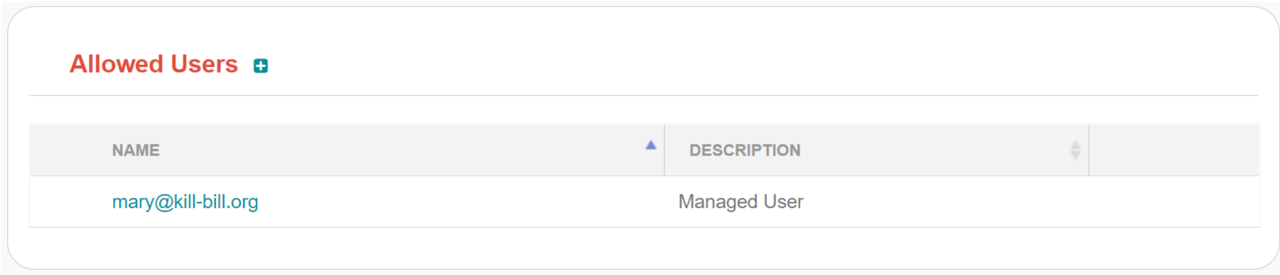
Use the steps in this section to change the user's name, password, or role.

To edit a user:

1. Click on your username and tenant name in the upper right corner: ←-CAN ALSO GO TO SETTINGS→USERS, BUT I DON'T HAVE ACCESS

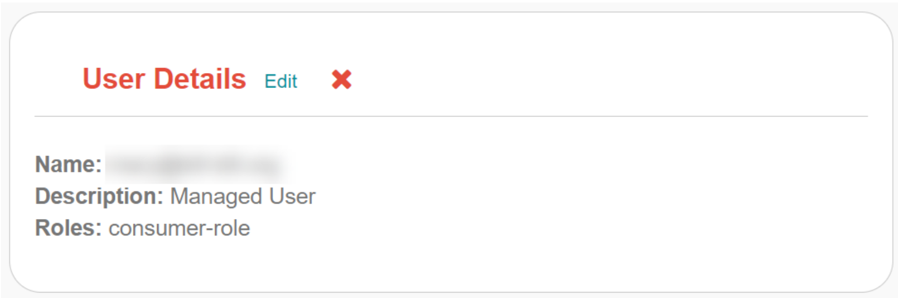


2. In the list of Allowed Users, click on the user to edit:



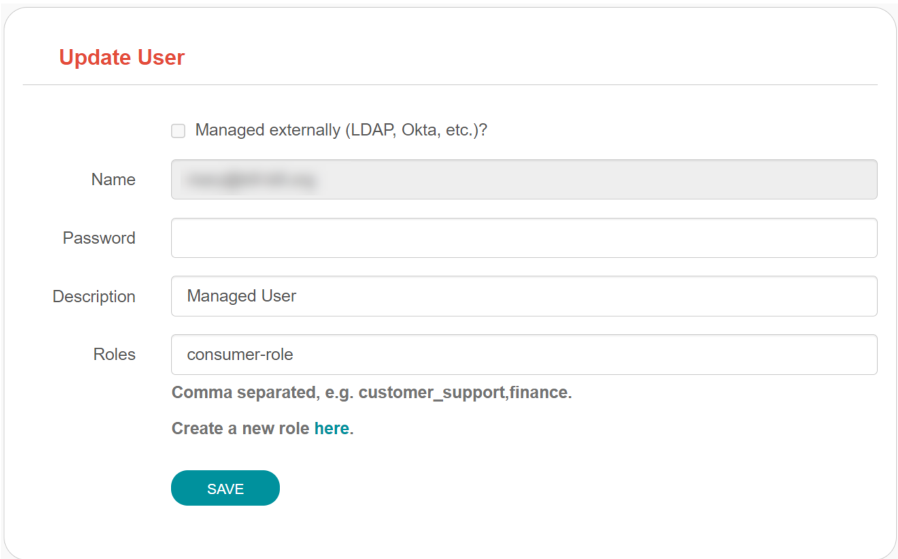
^^SAME COMMENT AS ABOVE ABOUT NEEDING A SCREENSHOT WITH A LONGER USER LIST

Kaui displays the User Details screen.



3. Click **Edit** (next to "User Details").

Kaui displays the Update User screen:



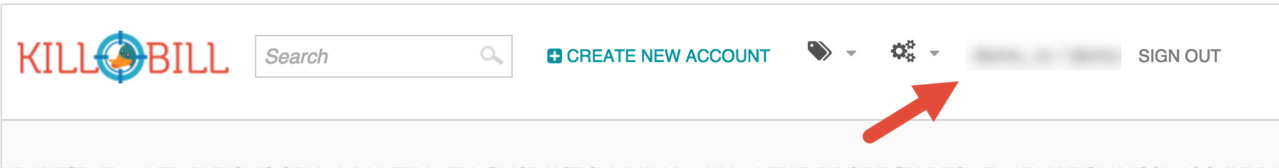
4. Fill in the user fields. For field descriptions, see Add New User Field Descriptions.
5. Click the **Save** button.

Add New User Field Descriptions

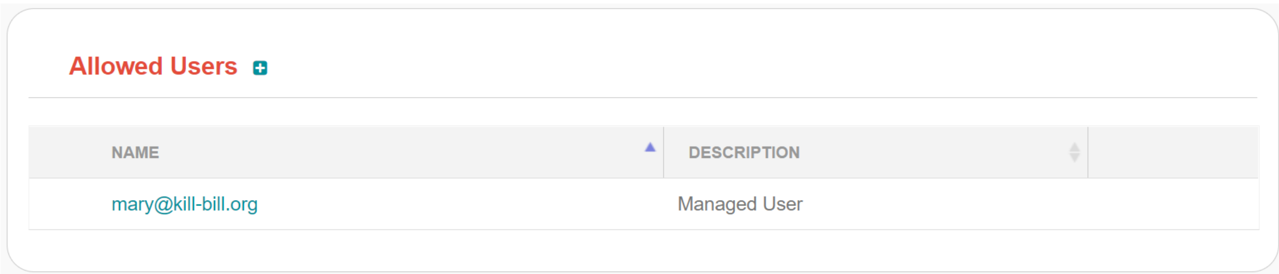
Field	Description
Managed externally (LDAP, Okta, etc.)?	Check this box if you are managing users in a third-party system. Otherwise, leave it unchecked.
Name	Enter the user’s name. *QST: Name should be first, last, both? Is email address here optional?*
Password	Enter the user’s password. For security, Kaui does not display any existing passwords in this field, but you can type in a different one. It may be easier to copy and paste the password into this field.
Description	To provide a brief description of this user or his/her role on the Allowed Users list, type it here.
Roles	Enter the roles that are associated with this user. You also have the option to create a new role.

Delete a User

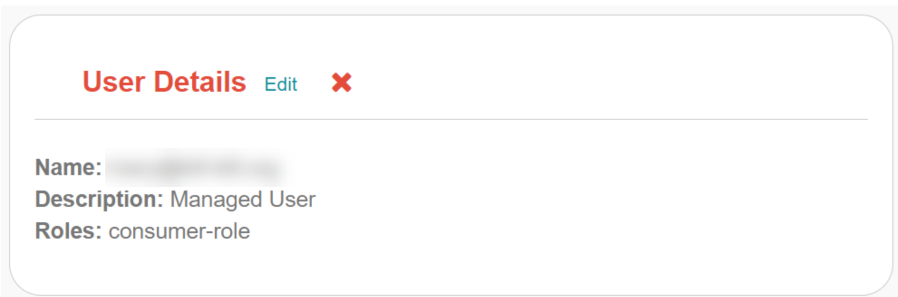
1. Click on your username and tenant name in the upper right corner:



2. In the list of Allowed Users, click on the user to edit:



Kaui displays the User Detail screen.



3. Click the ✖ icon. Kaui displays a message to confirm the deletion.
4. Click **OK**.