

# Overview

In this guide, "users" refers to those who log in to Kauai 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 Kauai users to be able to log in and perform tasks, you need to create a *user profile* for each one. A user profile stores the username and password as well as the following:

- ¥ The user's roles (i.e., permissions in the system)
- ¥ The tenants the user can access

In this section, you'll learn how to manage users in Kauai, which includes:

- ¥ Creating user roles
- ¥ Creating and editing users
- ¥ Assigning roles and tenants to users

This section assumes that you can log in as a Kauai 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 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 Kauai. For more information, see [Users, Roles, and Permissions Management](#).

In Kaui, all that's required is to add the username per the [Add a User](#) section, then [edit the user profile](#) to define passwords and roles.

## Managing Users with Kill Bill

If you are using the Kill Bill database to store user data, adding a user profile in Kaui automatically creates it in Kill Bill.

# Create a User Role

The role (or roles) assigned to a user defines which tasks the user can perform in the system (for example, perform a chargeback or add a custom field).

To create a user role:

1. Open the Add New Role Definition screen, either from the User Update screen (see [Edit a User](#)) or by accessing [https://<your\\_host>/kaui/role\\_definitions/new](https://<your_host>/kaui/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.

# Open the User List


To open a list of Kauai users:

At the top of the screen, click the gears icon ( ) and select Users.

Kauai displays the Kauai Users screen.

On this screen, you can [add a user](#) by clicking the plus icon. To open a user's details to [edit](#) or [delete](#), click the username.

## Add a User

1. [Open the users list](#).
2. Select the plus icon (  ) next to Kauai Users.

Kauai displays the Add New User pop-up:

3. Fill in the user fields. For field descriptions, see [Add New User Field Descriptions](#).
4. Click the Save button. Kauai displays the Configured Tenants pop-up:

5. Select the tenant(s) the user has access to.
6. Click the Save button.

## Edit a User

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

1. [Open the user list.](#)

2. Select the user you want to edit.

Kaui displays the User Details screen with the user's allowed tenants below.

3. To edit the *tenant*, select or deselect the appropriate boxes and click the Save button.
4. To edit other user information, click Edit (next to User Details).

Kaui displays the Update User screen:

5. Fill in the user fields. For field descriptions, see [Add New User Field Descriptions](#).
6. 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.  <i>QST: I wasn't able to test this: Is it a first name, last name, both, or an email, or is this completely up to the organization using Kill Bill? Does this field support spaces (like between a first and last name?)</i>
Password	Enter the user's password. For security, Kauai 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, type it here. Kauai displays this description on the Allowed Users list on the Tenant screen.
Roles	Enter the roles that are associated with this user. You also have the option to <a href="#">create a new role</a> .


## Delete a User

The following steps explain how to delete a user from the system (i.e., for both Kauai and Kill Bill). Deleting a user also removes the user's access to any assigned tenants.

1. [Open the user list](#).

2. Select the user you want to delete.

Kauai displays the User Details screen (with the user's allowed tenants below).

3. Click the  icon. Kauai displays a message to confirm the deletion.
4. Click OK.
5. Kauai displays the login screen and asks you to confirm your login credentials.

After you successfully log in, Kauai deletes the user.

## Add an Allowed User to the Tenant

The steps below explain how to add an existing user to the list of users who can access the tenant.

1. Log in to the tenant for which you want to allow access.
2. Click on your username and tenant name in the upper right corner:

Kauai displays the Tenant screen.

3. To the right of Allowed Users, click the plus icon (  ).

Kaui displays the Add Allowed User pop-up.

4. Type the user name into the User name field.
5. Click the Add button.

Kaui displays the newly added user to the Allowed Users list for the tenant.

## Remove a User from the Tenant

Perform the steps below to remove a user from the list of users who can access the current tenant.

### NOTE

Note: Removing a user from a tenant does not remove them from the Kill Bill system.

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

Kaui displays the Tenant screen.

2. Click the black X to the right of the user to remove:



3. Click OK.