

# The Controlant Platform

## Role Access guidelines

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After a user is created in the Controlant Platform (SCM), they must be assigned a role and/or user access rights. This determines what access they have to shipments, locations, and templates within the Controlant Platform. Role Access simplifies access management by creating categories of users – or “roles” – that all share the same access rights.

## How to use this guide

This booklet provides recommendations on how to set up user roles based on current best practices. Descriptions are provided for each of the seven most common user roles, along with screenshots which show recommended access rights for each role as they would be set up in Account Admin.



## Admin User

Admin users have access to Account Admin as well as the admin panel in the Controlant Platform. These users are typically responsible for tasks such as user management and location creation.

ACCESS TO	ACCESS VIA	PERMISSION/S	ACTIONS
Locations	(Company Global)	Read, Create, Modify, Delete, Approve	
Shipments	(Company Global)	Read, Create, Modify, Delete, Approve	



## Template Access

Users with this role can view shipment, shipment contacts, and/or shipment warnings templates. This role may be granted to users in addition to their primary role; doing so will grant users read access to templates in addition to whatever permissions are granted to their primary role. Admin users with this role will also be able to create, modify, and delete templates.

ACCESS TO	ACCESS VIA	PERMISSION/S	ACTIONS
Shipment Contacts Templates	(Company Global)	Read	
Shipment Warnings Templates	(Company Global)	Read	
Shipment Templates	(Company Global)	Read	

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### Shipping Site

Shipping Site users are typically warehouse workers or office workers in charge of coordinating outbound shipments. These users can view, create and modify shipments that ship from a specific origin location.

ACCESS TO	ACCESS VIA	PERMISSION/S	ACTIONS
Locations	(Company Global)	Read	
Shipments	Origin location: Shipping Site Warehouse	Read, Create, Modify	
Shipments	(Company Global)	Create	

**Note:** For user roles to have access to the **Create Shipment** button in the Controlant Platform, they must always be granted **Create** access to shipments via **Company Global**. To limit their access to specific countries or locations, they should then also be given permissions to shipments via the specific country or location as needed (see screenshot). This second set of location-specific permissions will override the user's ability to access all global shipments.



### Receiving Site

Receiving Site users are typically warehouse workers. These users can view shipments that shipped to a specific destination location.

ACCESS TO	ACCESS VIA	PERMISSION/S	ACTIONS
Shipments	Destination location: Receiving Site Warehouse	Read	
Locations	(Company Global)	Read	



To make it easier to search for roles once created, we suggest the below naming convention when creating new roles in Account Admin:

**Country (Country code) – City\* – Role**  
*Example: Iceland (IS) – Reykjavik – Shipping Site*

*\*Optional to include if there are multiple sites within a single country.*

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### Global Quality

Global Quality users can view and inspect (or approve) any shipment within the customer's account.

ACCESS TO	ACCESS VIA	PERMISSION/S	ACTIONS
Locations	(Company Global)	Read	
Shipments	(Company Global)	Read, Approve	



### Shipping Quality

Shipping Quality users can view, create, modify and inspect (or approve) shipments that shipped **from** a specific origin location.

ACCESS TO	ACCESS VIA	PERMISSION/S	ACTIONS
Shipments	Origin location: Shipping Site Warehouse	Read, Create, Modify, Approve	
Locations	(Company Global)	Read	
Shipments	(Company Global)	Create	



### Receiving Quality

Receiving Quality users can view, modify and inspect (or approve) shipments that shipped **to** a specific destination location.

ACCESS TO	ACCESS VIA	PERMISSION/S	ACTIONS
Shipments	Destination location: Receiving Site Warehouse	Read, Modify, Approve	
Locations	(Company Global)	Read	
Shipments	(Company Global)	Create	