

<b>Bulletin Number:</b> CO_IB_4.26.24_Default license, special characters, and permissions	<b>Distribution Date:</b> 04/29/2024	<b>Effective Date:</b> Ongoing
<b>Contact Point:</b> Metrc Support	<b>Subject:</b> Default license, special characters, and permissions	
<b>Reason:</b> Provide insight into system updates and new permissions		

Greetings,

Metrc is pleased to provide information on the latest system enhancements and updates, including:

- Allowed Special Characters
- Setting Default Licenses
- Additional View Permissions

Please read on for more information regarding this new functionality.

## Special Characters

Metric currently supports several string fields for users to input information such as Strain Names, Item Names, Locations, Harvest Batches, Plant Batches, Production Batches, Drivers, Vehicles, and Notes. The table below outlines accepted characters the Metric system will receive for string fields – **see Figure 1**.

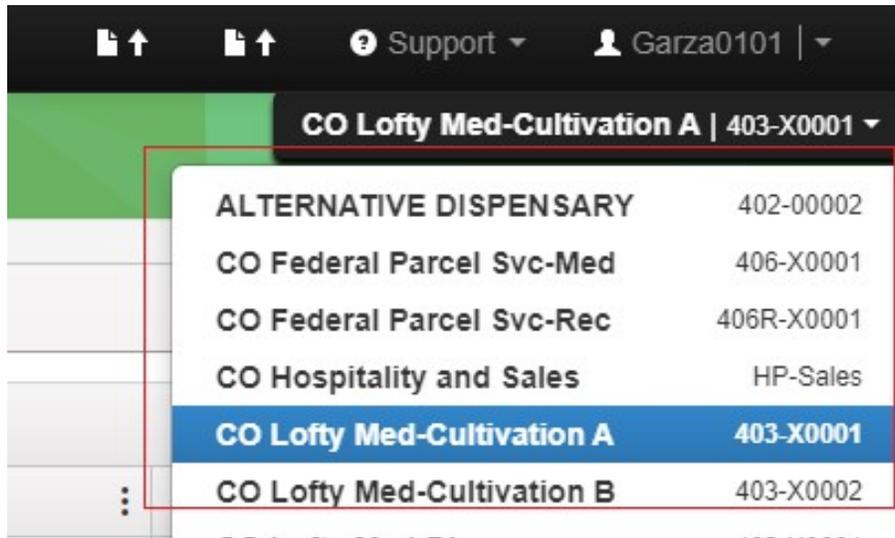
<b>Characters</b>	<b>Accepted</b>
Lower Case Letters	a-z
Upper Case Letters	A-Z
Numbers	0-9
Special	‘.?!@#\$\$%^&*()[]\ >+-_`~:,

**Figure 1: Accepted Characters in Metric**

If a character is submitted that is not deemed acceptable, the Metric system will return an error message. The error message states, "Invalid character or sequence in parameter {name}." The {name} will represent the name of the field where the invalid character or sequence was attempted to be used.

## Setting Default Licenses

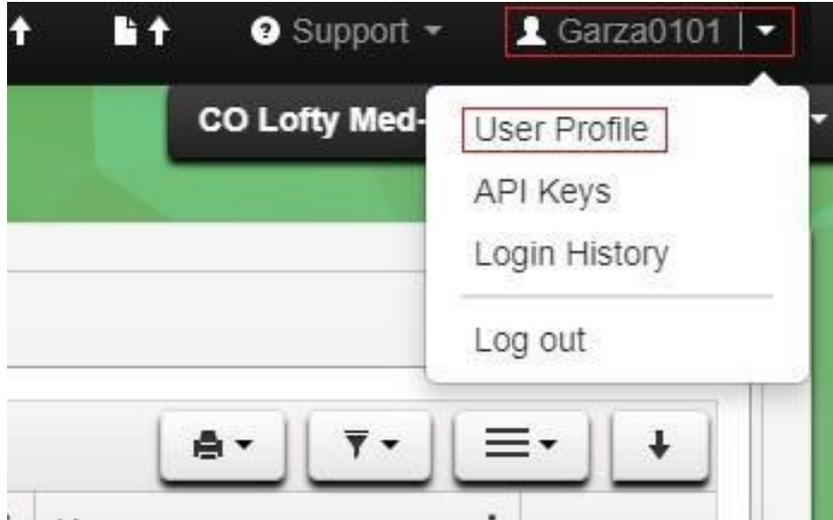
Previously, users who have access to multiple Metrc facilities were automatically directed or defaulted to the licensed facility that the user was first credentialed into when logging into the system. Below is an example of accessible Metrc facilities within a user’s license dropdown located at the top right of the grid – **see Figure 2.**



**Figure 2: Available facilities in License drop-down**

Now, new functionality offers the ability to change the default license setting through a user’s profile. To update this setting, please take the following steps:

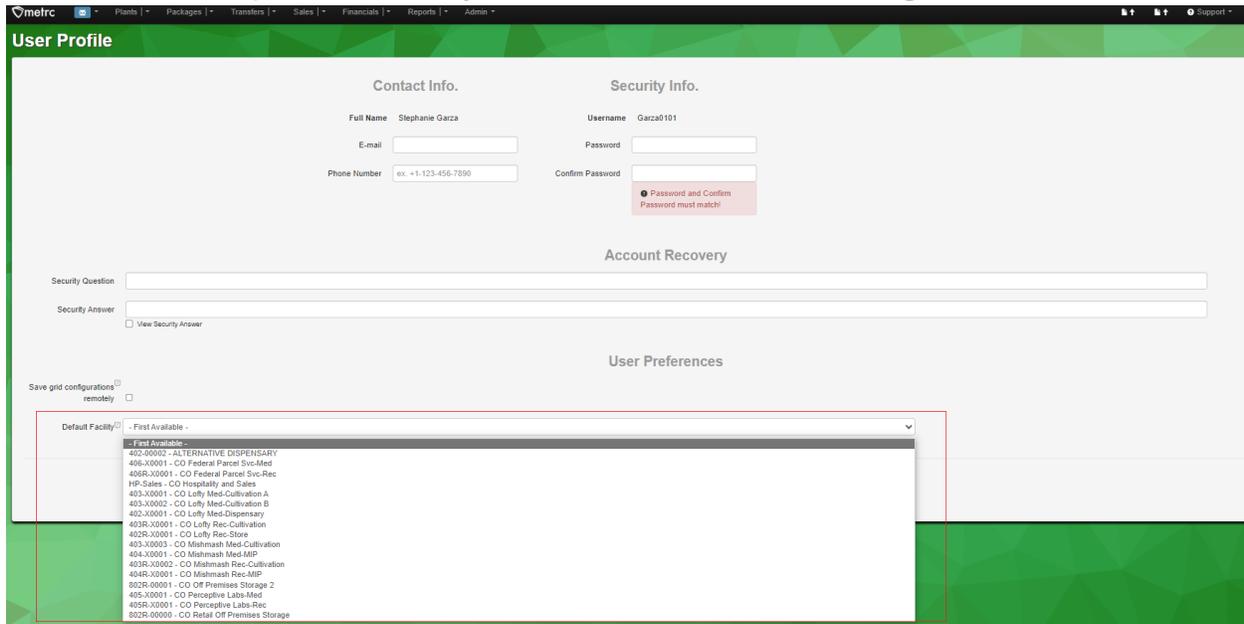
1. Click on the drop-down arrow to the right of the username on the navigational toolbar to access the User Profile – **see Figure 3.**



**Figure 3: Access the User Profile**

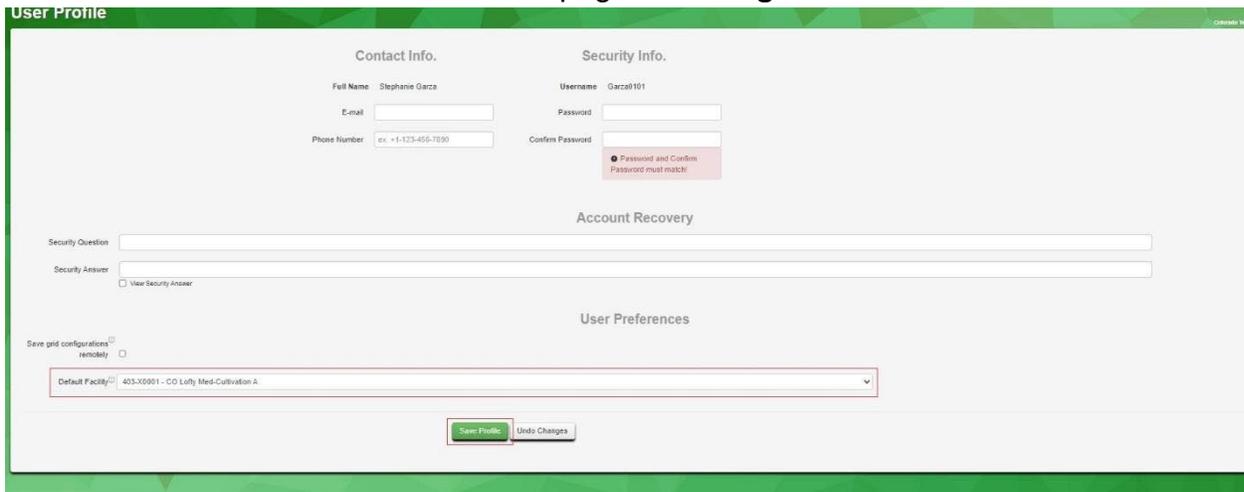
Once on the User Profile page:

2. Select the Default Facility drop-down at the bottom of the screen.
3. Select the preferred facility to use as the default – see **Figure 4**.



**Figure 4: Default Facility drop-down**

1. Once the preferred default facility is selected, click the green Save Profile button at the bottom of the User Profile page – see **Figure 5**.

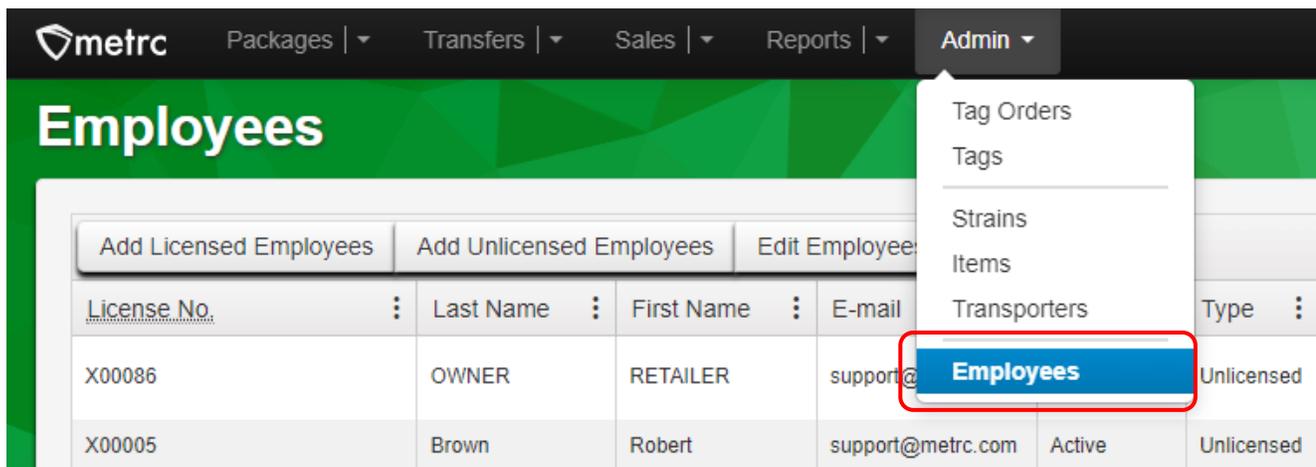


**Figure 5: Save Default Facility**

## View Permissions

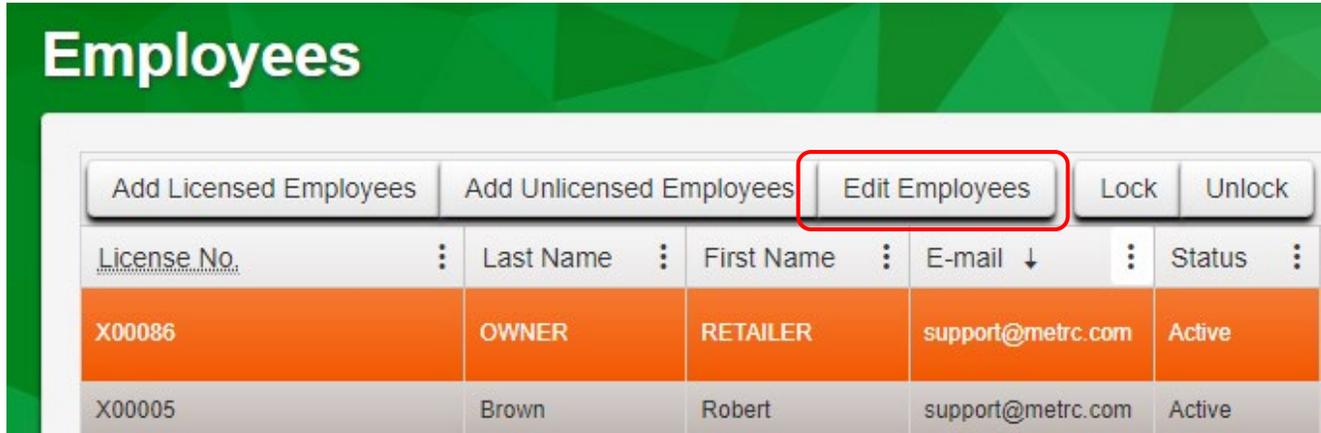
Based on the collaboration between and feedback received from industry users, state agency representatives, and Metrc during the quarterly User Groups, the addition of View permissions to all three Transfer Menu options and the Employees grid found in the Admin area is now available.

To set up these permissions, first navigate to the Admin area dropdown on the navigational toolbar and select the Employees option – see **Figure 6**.



**Figure 6: Employees option in Admin area dropdown**

From the Employees grid, highlight the employee required edited permissions and select the Edit Employees button to access the Edit Employees action window – **see Figure 7.**



**Figure 7: Edit Employees button**

Within the Edit Employees action window, the option to grant View only access to the Transfers Menu and Admin Menu – Employees is now available. Users can select either View or Manage for these permissions, but not both. Selecting Manage grants both manage and view permissions – **see Figure 8.**

## Edit Employees

### Employee # 1

Employee	RETAILER OWNER	Permissions	<b>Packages Page</b>	
Employee Lic. Number	X00086		Grids (req'd)	<input checked="" type="checkbox"/> View
<input checked="" type="checkbox"/> Enable online access to this Facility			Inventory	<input checked="" type="checkbox"/> Manage
E-mail	support@metrc.com		Create/Submit/Disc.	<input checked="" type="checkbox"/> Manage
Home	Packages		Notes	<input type="checkbox"/> Manage
Employment	<input type="checkbox"/> Owner at this Facility		<b>Transfers Menu</b>	
	<input checked="" type="checkbox"/> Manager at this Facility		Licensed & External	<input checked="" type="checkbox"/> View <input type="checkbox"/> Manage
	<input type="checkbox"/> Checks/Verifies customer identification		Templates	<input checked="" type="checkbox"/> View <input type="checkbox"/> Manage
	<input type="checkbox"/> Compliance Officer or Security		Hub	<input checked="" type="checkbox"/> View <input type="checkbox"/> Manage
	<input type="checkbox"/> Data entry/Records inventory in Metrc		<b>Sales Menu</b>	
	<input type="checkbox"/> Directly handles marijuana items		Sales	<input checked="" type="checkbox"/> Manage
	<input type="checkbox"/> None of the above		Sales Delivery	<input type="checkbox"/> Manage
			Adverse Responses	<input type="checkbox"/> Manage
			<b>Patients Menu</b>	
			<b>Trips Menu</b>	
			All	<input type="checkbox"/> View <input type="checkbox"/> Manage
			<b>Financials Menu</b>	
			All	<input checked="" type="checkbox"/> Manage
			<b>Reports Menu</b>	
			All	<input checked="" type="checkbox"/> View
			<b>Admin Menu</b>	
			Tag Orders	<input checked="" type="checkbox"/> Manage
			Tags	<input type="checkbox"/> Manage
			Strains	<input checked="" type="checkbox"/> Manage
			Items	<input checked="" type="checkbox"/> Manage
			Transporters	<input type="checkbox"/> Manage
			Employees	<input checked="" type="checkbox"/> View <input type="checkbox"/> Manage
			<b>Search Menu</b>	
			Search Facility	<input type="checkbox"/> Manage
			Caregiver Status Lookup	<input type="checkbox"/> View

Figure 8: New View permissions for Transfers and Admin Menu

## Metrc resources

If you have any questions or need additional support, the following resources are available:

**Contact Metrc Support** by using the new full-service system – Service Cloud – by navigating to [Support.Metrc.com](https://support.metrc.com), or from the Metrc System, click Support and navigate to support.metrc.com and it will redirect to the portal.

*Please note:* If accessing the portal for the first time, a username (which is established when logging in), the respective state and “Facility license number”, and a valid email to set a password are required.

**Metrc Learn:** Metrc Learn has been redesigned to provide users with interactive, educational information on system functionality to expand skillsets and drive workflow efficiencies.

Accessing the new [Metrc Learn](#) LMS is simple through multiple convenient locations:

### ***From within the Metrc system***

- Navigate to the Support area dropdown on the navigational toolbar and select “Sign up for Training” to register.

### ***From the Metrc website***

- Navigate to your [state’s partner page](#) and scroll down to the “Metrc’s Training Resources” section to find the link.

Also, save the link – [learn.metrc.com](https://learn.metrc.com) – as a bookmark in your preferred web browser. If you have the existing link saved as a bookmark, please replace it with the new link.

**Access additional resources:** In the Metrc system, click on the Support area dropdown on the navigational toolbar and select the appropriate resource, including educational guides, manuals, and more.

Thank you for your continued partnership.