

**Subject**: New Features and Maintenance to Improve the User Experience in the California Cannabis Track and Trace System (CCTT-Metrc)

Ī	Bulleti	n Туре	Primary Audience: All Licensees
	$\boxtimes$	New Functionality	Contact: Metrc <sup>®</sup> Support
		Updated Functionality	Distribution Date: 7/30/2020
		Existing Functionality	Effective Date: 8/10/2020
		Rules & Guidance	Bulletin Number: CA_IB_2020_016
		Events	
I	$\boxtimes$	Informational	
Т			

Over the past few months, the CCTT-Metrc system has been experiencing sporadic system performance issues. We recognize that these issues in some cases have grown more frequent, causing long load times and error messages for certain users. We have determined the two primary causes are:

- Increasingly frequent API calls by third-party integrators. In certain instances, misuse of the API can cause a slowdown for all users, effectively clogging CCTT-Metrc with unnecessary data requests.
- 2) Large amounts of active data in licensee accounts. Active sales receipt, package, and transfer data sets are large in some states, impacting day-to-day functions as the system works through large portions of data no longer being used. In some cases, users have several years of data in their respective accounts that is no longer being used, but is part of their active data sets.

Starting July 21, Metrc began a series of system updates and production releases to enhance our software and make the system faster and easier to use. See below for a summary and brief timeline of these enhancements.

#### System Maintenance (7/21)

Metrc conducted system maintenance to prepare for rate limiting and data optimization (described below) between 6 and 9 AM. CCTT-Metrc remained available during that window.

#### Production Release (8/10)

The upcoming production release is primarily focused on fixes. Please find a detailed description of the enhancements on the following pages.



#### **Rate Limiting**

We will also be implementing an API best practice known as rate limiting in the near future. Rate limiting caps the number of API calls a third-party integrator can make in a given amount of time to ensure all integrators are given an equal playing field and no single user or company can overwhelm the system.

#### **Data Optimization**

We will begin moving historical data – data that is finalized or finished – to separate locations to further optimize system performance. Once the optimization is complete, users will still be able to access that data in CCTT-Metrc and "un-finalize" or "un-finish" data, if necessary. To maximize the benefits of data optimization, users are encouraged to finalize or finish sales receipts and packages that are no longer active. Metrc has provided users the ability to finalize sales, and to finish both packages and harvests. If you have any questions or need help with this process, please reach out to <a href="mailto:support@metrc.com">support@metrc.com</a>.

We will send additional communications about these enhancements and of any impacts they may have on daily operations over the coming weeks. Please see the following pages for details regarding the August 10 release.

The remainder of this his bulletin provides information on the latest enhancements to CCTT-Metrc, which will be available on August 10, 2020. The enhancements are listed below.

- I. Added a new Packaged By field in package popovers
- II. Added a new Item Strain column on the Lab Samples grid
- III. Added a requirement that a *Finished* package must be *Unfinished* before users can record or edit sales from the package
- IV. Added the ability to enter the number of additional packages to be included in a transfer and to upload a CSV or TXT file to populate the packages in a transfer
- V. Added a CSV upload for Plant Additives
- VI. Added a CSV upload for Immature Plant Additives
- VII. Updated the CSV Formatting Guide
- VIII. Added a link to the California Industry Bulletin Archive

Detailed descriptions of each change are provided on the following pages.



## I. Packaged By Field in All Package Popovers

A popover grid is displayed by hovering the mouse over the  $\bigcirc$  symbol anywhere in CCTT-Metrc. A *Packaged By* field has been added to the package popover to display the license number that created the package, as shown in **Figure 1** below.

Active	1A4FF03000002400000097							
Now Pa	Туре	Product	Unit Volume	N/A	Product Requires Remediation	No		
INEW Pa	Source Harvest(s)	N/A	Unit Weight	100 g	Contains Remediated Product	No		
Tag	Source Package(s)	N/A	Unit Quantity	N/A	Administrative Hold	No		
► Q I	Location	N/A	Item Serving Size	N/A	Packaged By	CDPH-0000003		
• Q	Location Type N/A		Item Supply Duration Days	N/A	Packaged Date	02/14/2020		
	Patient	N/A	Quantity	1,000 ea	Received Date	N/A		
• Q	Item	Burnt Brownies	Note	N/A	Received From License	N/A		
► Q	Item From License No. N/A		Production Batch	No	Received From Facility	N/A		
► Q.	Item From Facility	N/A	Trade Sample	No	Status	Active		
► Q.	Category	Edible (weight - each)	Donation	No				
► Q.	Item Strain	N/A	Source Package Donation	No				
	Unit CBD Percent	N/A	Donation License No.	N/A				
► Q.	Unit CBD Content	N/A	Donation Facility	N/A				
► Q.	Unit CBD Content Dose	N/A	Initial Lab Testing	NotSubmitted				
	Unit THC Percent	N/A	Lab Testing	NotSubmitted				
• Q	Unit THC Content	N/A	Lab Testing Date	02/14/2020				
► Q.	Unit THC Content Dose	N/A	Process Val. Sample	No				

Figure 1: Package Popover Menu

# **II. Lab Samples Item Strain Field**

Testing Laboratory users with the *View Packages* permission have access to a *Lab Samples* tab on the *Packages* page. Newly added to the *Lab Samples* grid is the *Item Strain* field, which will populate with the strain of the item, if applicable, as shown in **Figure 2** below.

Activ	ve On Hold Inactive	ab Samples In Transit			
				A- T-	
	Tag :	Item :	Category :	Item Strain	Lab Testing
×	Q III 1A4FF0300000C8200000018	Strawberry Shortcake Extract	Extract (weight)		TestPassed
•	Q III 1A4FF0300000C8200000018	Strawberry Shortcake Extract	Extract (weight)		TestPassed
•	Q III 1A4FF03000002900000183 🌢	FOG Flower	Flower	FOG	AwaitingConfirmatio
+	Q # 1A4FF030000029000000178	Yabba Dabba Doo Coffee	Edible (weight)		TestPassed
•	Q III 1A4FF0300000C8200000033 🍐	Lemonade Concentrate	Other Concentrate (weight - each)		TestPassed

Figure 2: Lab Samples Grid - Item Strain Field



### **III. Recording and Editing Sales on Finished Packages**

With this new update, Retailers and Microbusinesses licensed to perfom retail activities will no longer be able to record or edit sales receipts on a finished package. Attempting to do so will result in an error message, as shown in **Figure 3** below. The finished package must be unfinished prior to editing or recording a sale from it.

Contents from Package 1A4FF03000002600000388 cannot be sold because it has been	×
Finished.	

Figure 3: Finished Package Sale Error

#### **Unfinishing Packages**

To unfinish a package, navigate to the *Inactive* tab on the *Packages* page and select the package requiring a sales action. Once selected, use the *Unfinish* button as shown in **Figure 4** below and confirm the package you are unfinishing.

Activ	e On Hold Inactive	In Transit			
Ur	nfinish Tag :	Src. H's	Src. Pkg's :	Patient	Item :
•	<b>Q II</b> 1A4FF0300000026000000388				FOG Leaf
۲	Q 🔡 1A4FF01000002800000035		1A4FF01000002800000034		Burnt Brownies

#### Figure 4: Unfinish Package

Once the package is unfinished, any required sales actions can be taken. *Please note that if the sales action performed results in a non-zero amount, the package will not be able to be finished.* 



## **IV. New Features: Adding Multiple Packages to a Transfer**

Two new features are available when creating and editing licensed transfers that enhance the ability to add multiple packages to a transfer.

The first feature allows entry of additional packages in the transfer by entering the number of packages to be added and clicking the button once rather than having to click the button for each package to be added. Please note that the total number of packages in a transfer is limited to 200. The functionality is illustrated in **Figure 5** below.

	Type part of the License Number. <b>Q</b> (clear)	Туре	- Select -
Planned Route		<u>Est</u> Departure	iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii
			<b>^ ^</b>
			02 : 26 PM
		Est Arrival	■ 07/13/2020 today
			· ·
			02 : 26 PM
Deal			•
Раск	Type part of Package number Q	lear)	
5	(package)		Select files
	Register Transfer Cancel		
	Register Transfer Cancel		
	Register Transfer Cancel		
Pack	Register Transfer   Cancel     age #1   Type part of Package number   Q	0	
Pack	Register Transfer   Cancel     age # 1   Type part of Package number   Q     age # 2   Type part of Package number   Q	•	
Pack	Register Transfer   Cancel     age # 1   Type part of Package number   Q     age # 2   Type part of Package number   Q     age # 3   Type part of Package number   Q	•	
Pack Pack Pack Pack	Register Transfer   Cancel     age # 1   Type part of Package number   Q     age # 2   Type part of Package number   Q     age # 3   Type part of Package number   Q     age # 4	0	
Pack Pack Pack Pack	age #1   Type part of Package number   Q     age #2   Type part of Package number   Q     age #3   Type part of Package number   Q     age #4   Type part of Package number   Q	•	
Pack Pack Pack Pack Pack	Register Transfer   Cancel     age # 1   Type part of Package number   Q     age # 2   Type part of Package number   Q     age # 3   Type part of Package number   Q     age # 4   Type part of Package number   Q     age # 5   Type part of Package number   Q		
Pack Pack Pack Pack Pack Pack	Register Transfer   Cancel     age # 1   Type part of Package number   Q     age # 2   Type part of Package number   Q     age # 3   Type part of Package number   Q     age # 4   Type part of Package number   Q     age # 5   Type part of Package number   Q     age # 5   Type part of Package number   Q		





The second feature allows a CSV or TXT file containing a list of up to 200 packages to be uploaded to populate the packages into the transfer. The CSV or TXT file should contain a single column of packages tag UIDs and be saved on a local drive. **Figure 6** below is an example of a CSV file opened in Excel.

A
1A4FF0300000E1A000000247
1A4FF0300000E1A000000248
1A4FF0300000E1A000000251
1A4FF0300000E1A000000252
1A4FF0300000E1A000000253

Figure 6: CSV File in Excel

Click the *Select Files* button to select the CSV or TXT file from the saved location. Once selected, the package information will be populated into the transfer as shown in **Figure 7** below.

New Licensed	Transf	er						×
Destination 1	Туре ра	art of the License Number.	۹	(clear)		Туре	- Select -	~
Planned Route				Est		<u>Est.</u> Departure	■ 07/13/2020 t	oday
							01:50 PM	
						<u>Est</u> Arrival	<b>i</b> 07/13/2020 t	oday
							~ ~	
				1			01 : 50 PM	
Pack	age # 1	[			_	1		
	11 0	1A4FF0300000E1A00000	0247	٩	•			
Pack	age # 2	1A4FF0300000E1A00000	0248	٩	•			
Pack	age # 3	1A4FF0300000E1A00000	0251	٩	•			
Pack	age # 4	1A4FF0300000E1A00000	0252	٩	•			
Pack	age # 5	1A4FF0300000E1A00000	0253	۹	•			
0 1	(pa	ackage)				[	Select files	
						CSV Transfer	Upload.csv	×
		Register Transfer	ancel					

Figure 7: Successfully Uploaded Package CSV



### V. New Feature: CSV Upload for Plant Additives

Users now have the ability to upload a CSV file to record Plant Additives in CCTT-Metrc. To begin, navigate to the *Data Import* page by using the button on the top navigation bar shown in **Figure 8**.



Figure 8: Data Import Navigation Button

Once on the *Data Import* page, select the *Plant Additives* tab and select the CSV file to be uploaded as seen in **Figure 9**.



#### Figure 9: Select Files under Plant Additives Tab

Please note: Use the format and examples (shown in Figure 10) as guidance for preparing the CSV file to ensure there are no issues with the upload.







Once the file is selected, it will appear with the *Upload* option, as shown in **Figure 11**. Select the *Upload* option to complete the upload into CCTT-Metrc.

Select files	
CSV Plant Additives.csv 0.76 KB	×
Clear	Upload

Figure 11: Complete Plant Additives CSV Upload

Verify that the CSV was uploaded successfully by checking the status of the import in the grid, as shown in **Figure 12** below.

Select files V Done									
CSV Plant Additives.csv 0.76 KB									
	File   i   Uploaded   i   Entries   i   Status   i								
•	Plant Additives.csv	07/09/2020 04:30 pm	6	Successfully Imported					

Figure 12: Verify Plant Additives Upload



### VI. New Feature: CSV Upload for Immature Plant Additives

There is now the ability to upload a CSV file to record Immature Plant Additives in CCTT-Metrc. To begin, navigate to the *Data Import* page by using the button on the top navigation bar shown in **Figure 8** above.

Once on the *Data Import* page, select the *Immature Plant Additives* tab and select the CSV file to be uploaded as shown in **Figure 13**.



#### Figure 13: Select Files under Immature Plant Additives Tab

Please note: Use the format and examples (shown in Figure 14) as guidance for preparing the CSV file to ensure there are no issues with the upload.

CSV Columns	CSV Example
1. Plant Batch Name 2. Additive Type Name 3. Product Name 4. EPA Registration Number 5. Supplier 6. Application Device 7. Total Amount (value)	AK-47 Clone 3/10/2019 (123),Fertilizer,Wonder Sprout,EPA1234ABCD,G Labs,GreatDistributor 2101b,5,Gallons,12/15/2019 12:00:00 AM,Phosporus,30 AK-47 Clone 3/10/2019 (123),Fertilizer,Wonder Sprout,EPA1234ABCD,G Labs,GreatDistributor 2101b,5,Gallons,12/15/2019 12:00:00 AM,Potassium,15 AK-47 Clone 3/10/2019 (123),Fertilizer,Wonder Sprout,EPA1234ABCD,G Labs,GreatDistributor 2101b,5,Gallons,12/15/2019 12:00:00 AM,Potassium,15 Flo Seed 4/7/2019 (123),Fertilizer,Wonder Sprout,EPA1234ABCD,G Labs,GreatDistributor 2101b,5,Gallons,12/15/2019 12:00:00 AM,Potassium,15 Flo Seed 4/7/2019 (777),Pesticide,Wix Awesome Pesticide,RIDAPEST1234,Pesticides R US,Pesticide Sprayer,5,Gallons,12/25/2019 12:00:00 AM,Potassium,3
8. lotal Amount (unit of measure) 9. Date Applied 10. Active Ingredient Name 11. Active Ingredient Percentage	A CSV header row must not be included. Files must be plain-text only (e.g. CSV and TXT).

#### Figure 14: Immature Plant Additives CSV Columns and Example



Once the file is selected it will appear with the *Upload* option, as shown in **Figure 15**. Select the *Upload* option to complete the upload into CCTT-Metrc.

Select files						
Immature Plant Batch Plant Additives.csv 0.11 KB						
	Clear					
	Upload					

Figure 15: Complete Immature Plant Additives Upload

Verify that the CSV was uploaded successfully by checking the status in the import in the grid, as shown in **Figure 16** below.



Figure 16: Verify Immature Plant Additives Upload



# VII. Updated CSV Formatting Guide

Metrc Support has updated the *CSV Formatting Guide*, which can be found under the *Support* menu on the top navigation bar when logged into Metrc, as shown in **Figure 17**.

In the second secon
Manual / User Guide
California Supplemental Guide Mobile App Guide Industry Bulletin Archive
CSV Formatting Guide
Customer Support: - https://support.metrc.com/ - support@metrc.com - 1-877-566-6506 Sign up for Training Training Videos
Technical Support

Figure 17: CSV Formatting Guide



# VIII. Link to the Industry Bulletin Archive

A link to the *Industry Bulletin Archive* has been added to the *Support* menu on the top navigation bar when logged into Metrc, as shown in **Figure 18.** 

Li↑ ③ Support -
Manual / User Guide
California Supplemental Guide Mobile App Guide
Industry Bulletin Archive
CSV Formatting Guide
Customer Support: - https://support.metrc.com/ - support@metrc.com - 1-877-566-6506 Sign up for Training Training Videos
Technical Support

Figure 18: Industry Bulletin Archive

Please feel free to contact Support at <u>support@metrc.com</u> or 877-566-6506 with any questions.