

Bulletin Number: CO_IB_12.23.21	Distribution Date: 12/17/21	Effective Date: 12/20/21
Contact Point: Metrc® Support	Subject: Metrc Knowledge Center Expansion and Metrc Learn	
Reason: Metrc is announcing new features that will be offered to the industry for support and training		

Greetings Metrc Users,

Metrc is pleased to provide information on new resources that will be available to the industry for Metrc Support and Training. The bulletin is split between the two new resources, [Metrc Learn](#) and the [Metrc Knowledge Center](#).

Metrc Learn is an interactive learning management system that allows users to complete modular training for multiple areas of Metrc. The system will teach the user specific functionality and processes and allow the user to demonstrate and test their knowledge on the information provided. Users will even be able to export and share their completed trainings.

The Metrc Knowledge Center is a portal that provides users on-demand access to various resource materials including past bulletins and helpful links. This center is designed to be a supplemental resource to the Metrc Support team, providing options for self-assistance with documentation, a live-chat feature, and the ability to submit support tickets directly to our team.

Please find on the following pages a detailed description of the new features:

Metrc Learn – An Interactive Learning Management System

Metrc Learn is designed to provide users with skills on the functionality available within Metrc they need in order to use the system effectively. Metrc Learn is organized into role-specific programs that are made up of various courses; each course is focused on one function in Metrc. For example, the Cultivator program might include 15 courses, such as “Creating an Immature Plant Batch,” “Tracking Additives,” “Reporting Waste,” etc.

At this time, Metrc Learn offers four programs—Cultivator, Manufacturer, Sales, Testing—and 42 courses. Additional programs and courses are currently under development.

To access Metrc Learn, the user will register their account ([Metrc Learning Registration](#)), and upon approval of Metrc status, will be sent an email invitation to set their password. If a user is working in multiple states or licenses, they should register for the program that reflects the area of their role they are looking to have additional training on first. This registration page is shown below in **Figure 1**.

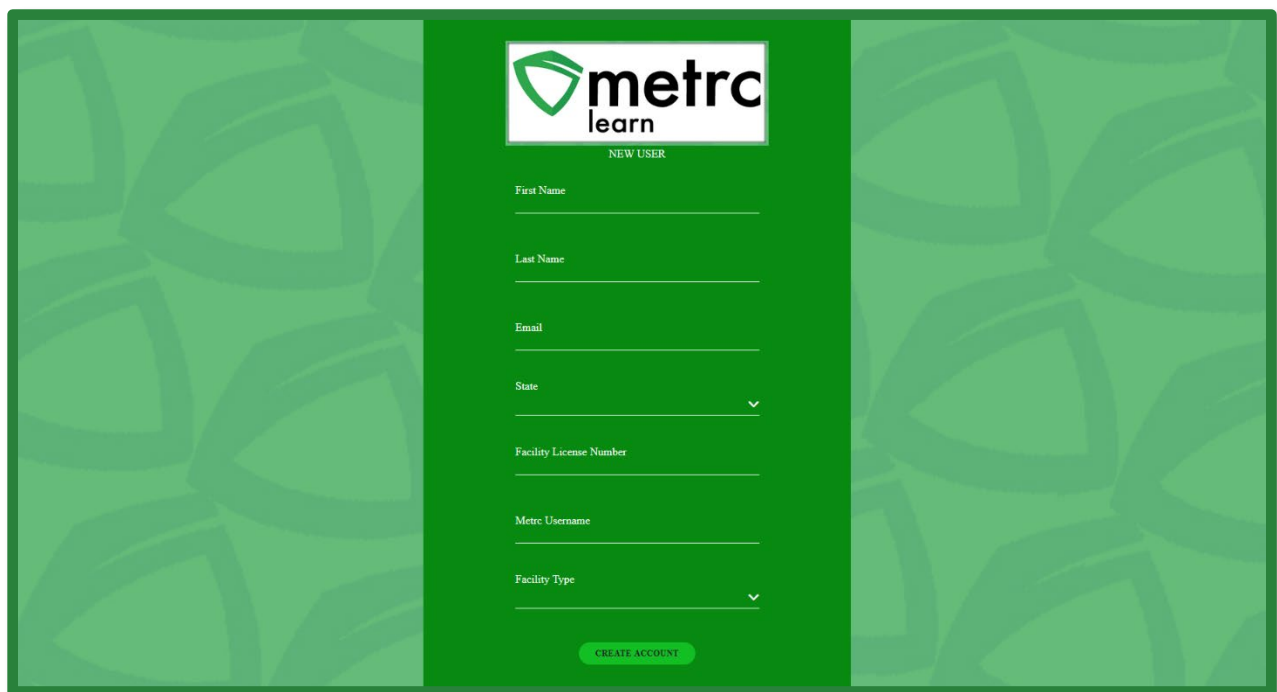
The image shows a web registration form for Metrc Learn. The form is centered on a green background with a subtle leaf pattern. At the top of the form is the Metrc Learn logo, which consists of a green shield icon and the text "metrc learn". Below the logo, it says "NEW USER". The form contains several input fields: "First Name", "Last Name", "Email", "State" (a dropdown menu), "Facility License Number", "Metrc Username", and "Facility Type" (a dropdown menu). At the bottom of the form is a green button with the text "CREATE ACCOUNT".

Figure 1: Metrc Learn Registration Page

Please Note: Users are encouraged to use an email they will have access to regardless of business association for their registration to ensure that any training transcripts are still accessible if email access is no longer available.

Course trainings are interactive and iterative to reinforce learning and ensure knowledge retention. Each course includes a demo and a hands-on component. The demo visually walks users through each step of the process and includes guidance via pop-up windows and voice narration. An example is shown below in **Figure 2**.

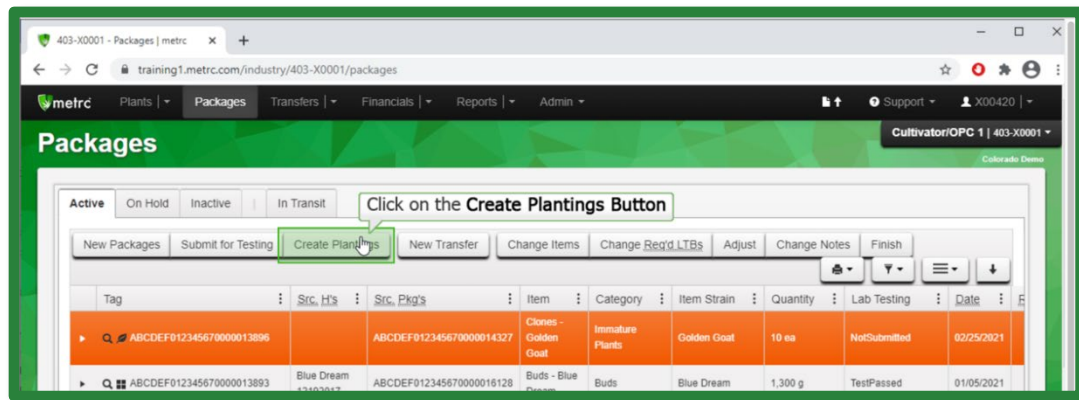


Figure 2: Demonstration Example

After viewing the demo, users get to try it themselves. As they step through the process on their own, they receive prompts and guidance if they make any errors. They can review the demo and try it themselves as many times as they'd like.

This feature is shown below in **Figure 3**.

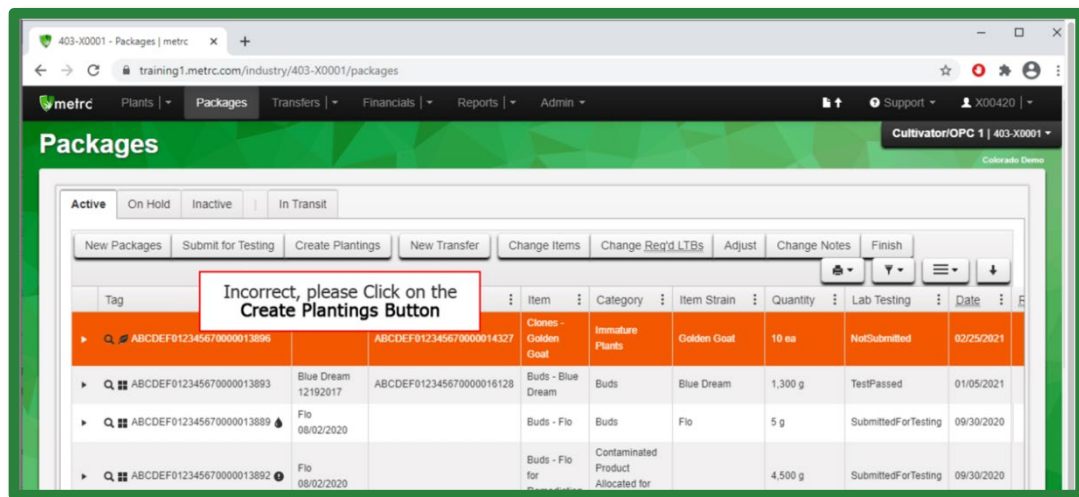


Figure 3: Interactive Demo Example

Users can either self-select or be assigned programs and courses that they can take at their own pace. This approach gives users the flexibility to learn about other areas of the system that may interest them, as well as the ability to see what courses are mandatory for their role. Once they complete all courses in a program, they will take a comprehensive quiz, which they must pass (scoring 70% or higher) before the program is considered complete.

Metrc Learn tracks and displays all completed coursework. The user will even have opportunities to receive badges and certificates upon completion of a program. And, if desired the user can print out a transcript of all their trainings for record keeping and ongoing training exercises.

Export Transcripts

Users will be able to export and share their achievements in the training portal by using the “Export Transcripts” button under their learning library. This feature is shown below in **Figure 4**.

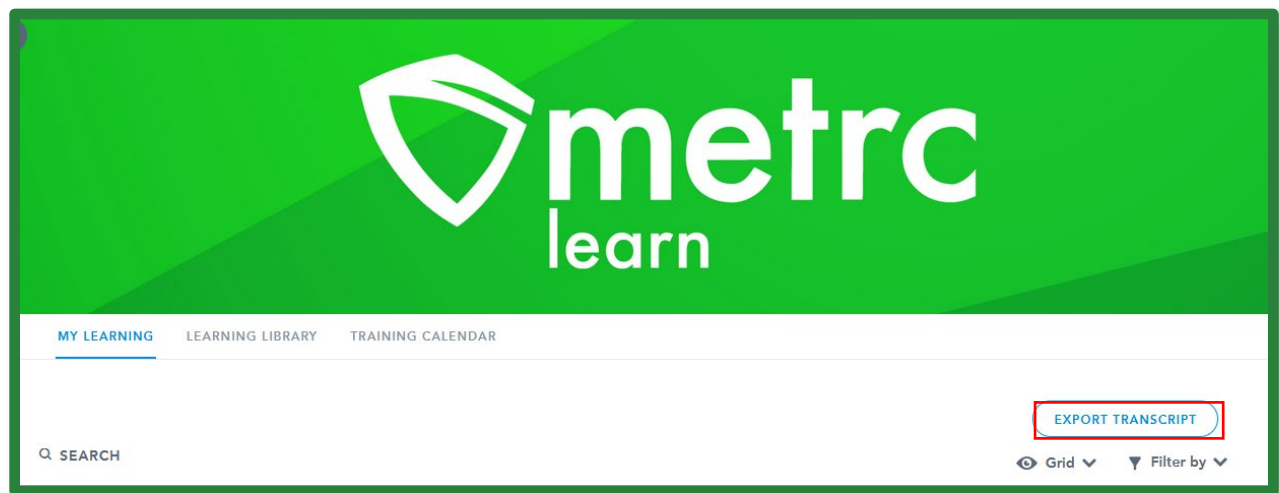


Figure 4: Export Transcript Feature

Learning Library

Users can also explore the Learning Library—and its dozens of YouTube videos and resources—or find webinars they'd like to attend via the Training Calendar. This feature is highlighted in **Figure 5**.

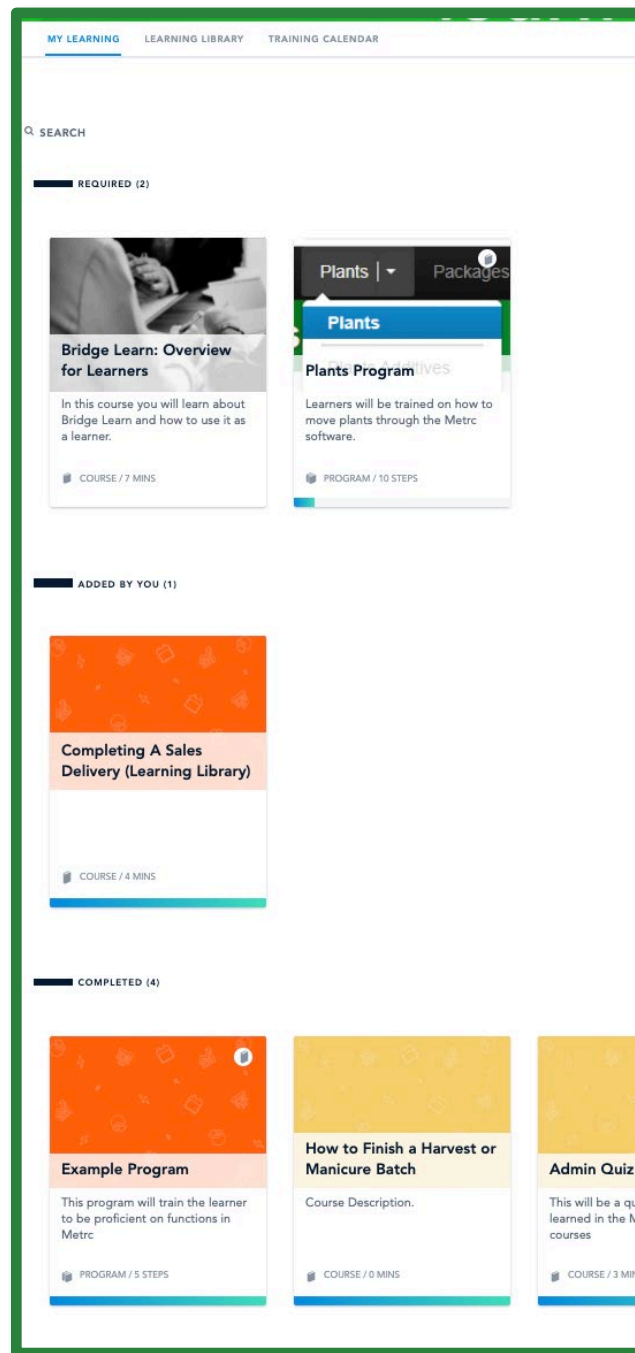


Figure 5: Learning Library

Metrc Knowledge Center

The Metrc Knowledge Center is designed to provide licensees the ability to search and view Metrc related content. The knowledge center is a repository for information that Metrc Support would normally help them obtain. This includes Bulletins, helpful links, best practices, and common questions.

For example, if a user was looking for a specific bulletin, they can enter the bulletin number or key words in the search bar to find all the relevant documentation.

The search feature is located at the top of the page along with a link to Metrc.com as well as Metrc Support's contact information and hours. Below this section, the user will see a button for their state that will take them to their state's respective repository. This can be seen below in **Figure 6**.

Figure 6: Knowledge Center Search Bar and Bulletin Repositories

The user will select the state they are in to view the bulletin repository and any additional links associated with that program. This is shown below in **Figure 7**.

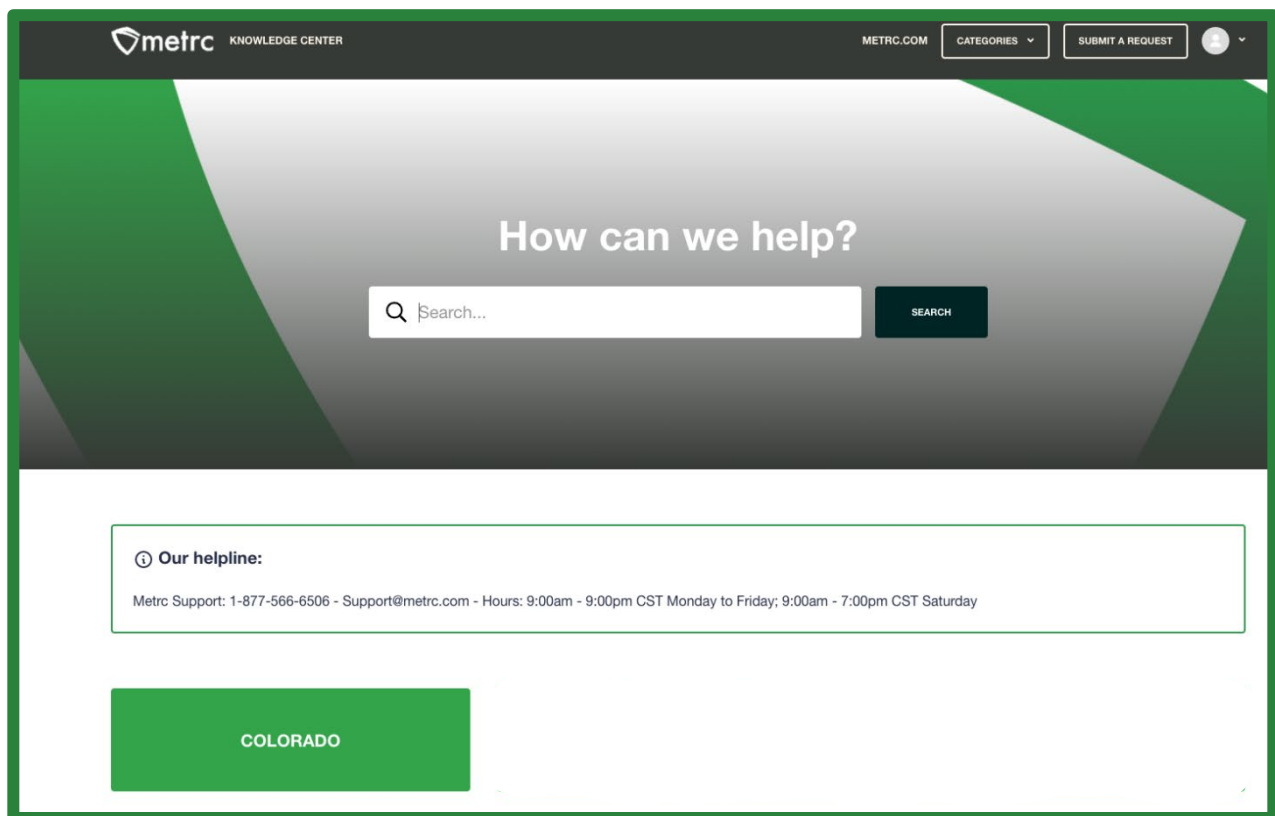


Figure 6: Knowledge Center Search Bar and Bulletin Repositories

The user will select the state they are in to view the bulletin repository and any additional links associated with that program. This is shown below in **Figure 7**.

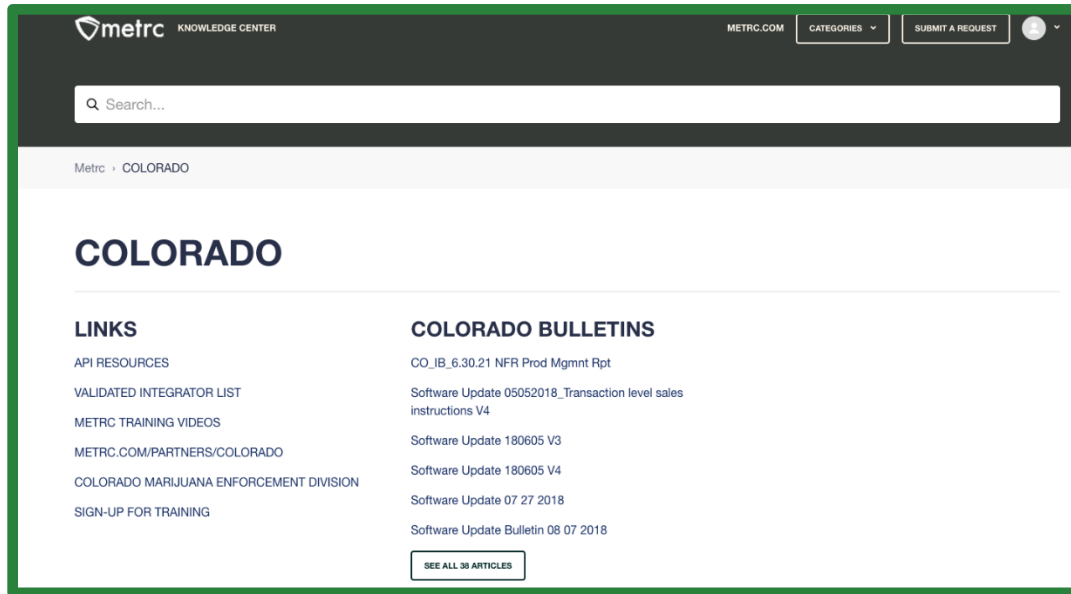


Figure 7: State Page Example

Once a bulletin has been selected, it will take the user to the bulletin page. The user can view the bulletin by clicking on it again, print the bulletin, share the bulletin, or follow to stay on top of any updates made to this bulletin. At the bottom, the user can indicate if the article was helpful to provide feedback on the documentation. This page is shown below in **Figure 8**.

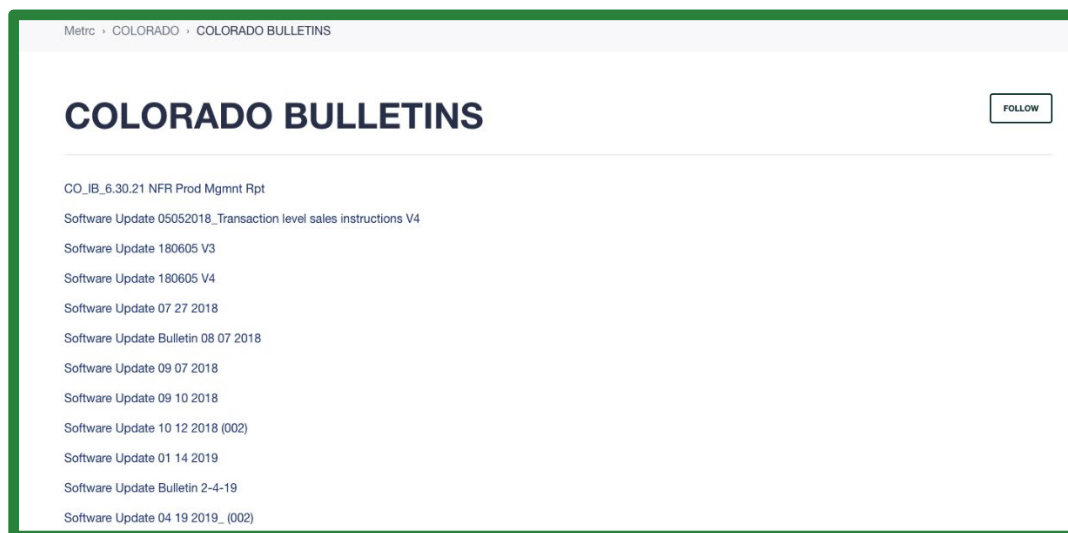


Figure 8: Bulletin Page

If the user is unable to find relevant material to assist them in their request, they can submit a support ticket directly from the page. This option is shown below in **Figure 9**.

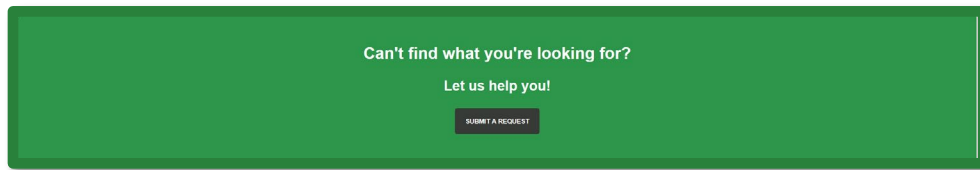


Figure 9: Submit a Request Button

By using this button, the user will navigate to the request area where they will fill out a form to submit a ticket to support. The user will indicate if this is a Support of API related request. This step is shown below in **Figure 10**.

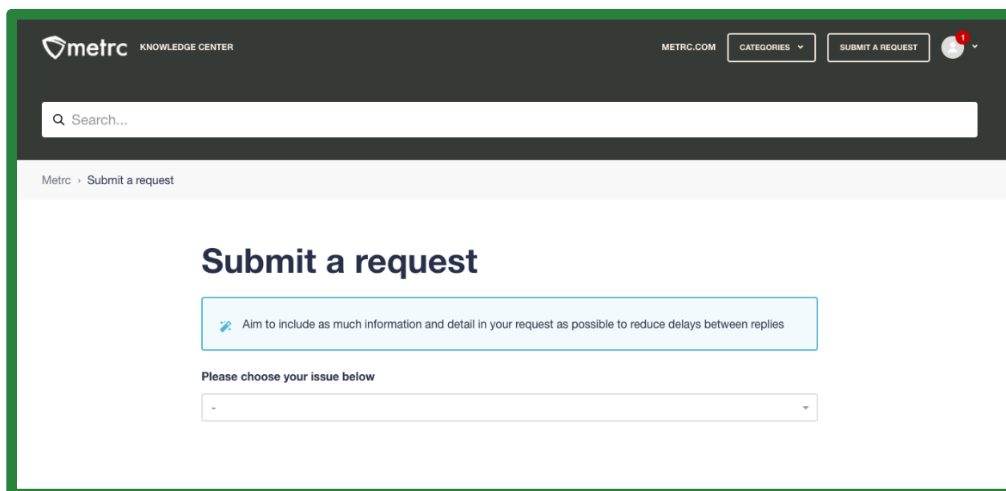


Figure 10: Submit a Request Landing Page

Once an option is selected, the user will be navigated to the Request Submission form. Here the user will enter the required information as listed, providing as much detail as possible to allow for the most efficient response from Metrc Support. This form is shown below in **Figure 11**.

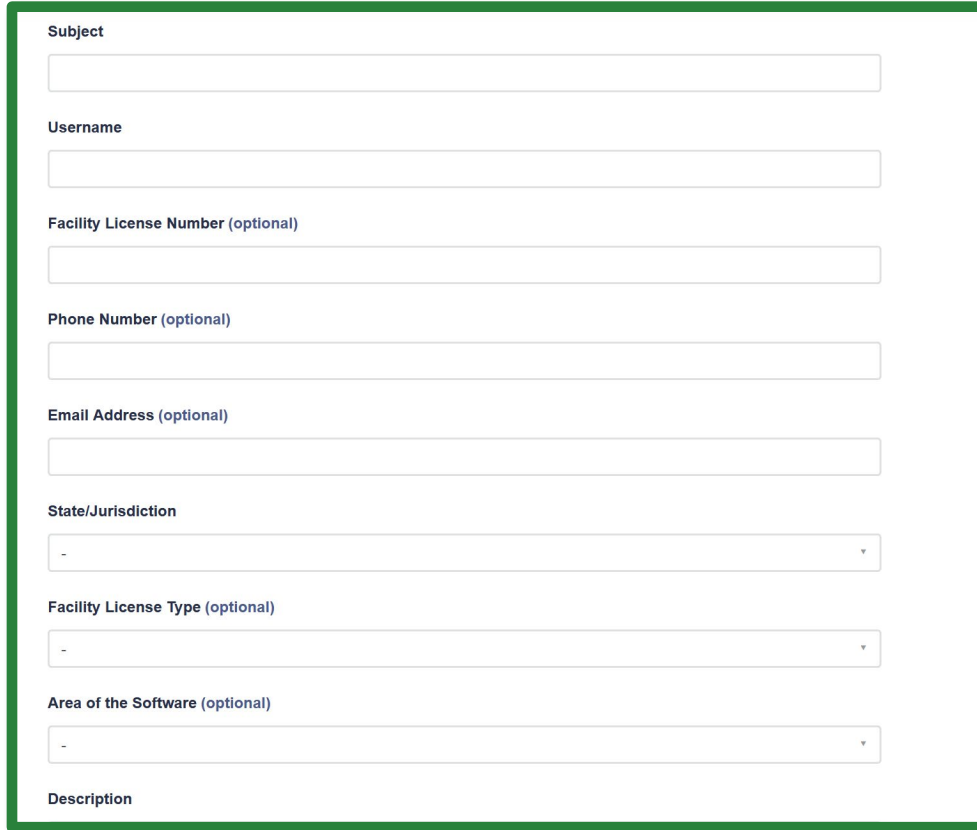
A screenshot of a support ticket submission form. The form is enclosed in a green border and contains several input fields. The fields are labeled as follows: 'Subject' (text input), 'Username' (text input), 'Facility License Number (optional)' (text input), 'Phone Number (optional)' (text input), 'Email Address (optional)' (text input), 'State/Jurisdiction' (dropdown menu), 'Facility License Type (optional)' (dropdown menu), 'Area of the Software (optional)' (dropdown menu), and 'Description' (text input). Each field is currently empty or shows a default value like a hyphen.

Figure 11: Support Ticket Submission Form

Zendesk Answer Bot

The Answer Bot is located within the Metrc Support module and is an AI tool that learns as it interacts with the industry. Responses are pulled directly from the Knowledge Center to facilitate answering questions the user may have. Should the user need additional help at any time, they can utilize chat with support, make a phone call to support or send an email. The Answer bot is located in the Metrc Support module. Responses are catalogued from prior response emails to refer them over to the knowledge center. It is an AI function that learns as it is used by the industry. It ties into the knowledge center information only. Should the licensee need additional help at any time, they can utilize chat with support, have a phone call with support or send an email.

Live Chat

Live chat is another feature available through the Knowledge Center. This feature allows users to chat with live agents. To access this feature, the user will click the icon, and this will prompt an action window to begin chatting with an agent. The chat feature will ask some basic questions, like the user's full name and phone number, to give that information to the agent. This is shown in **Figure 12**, below.

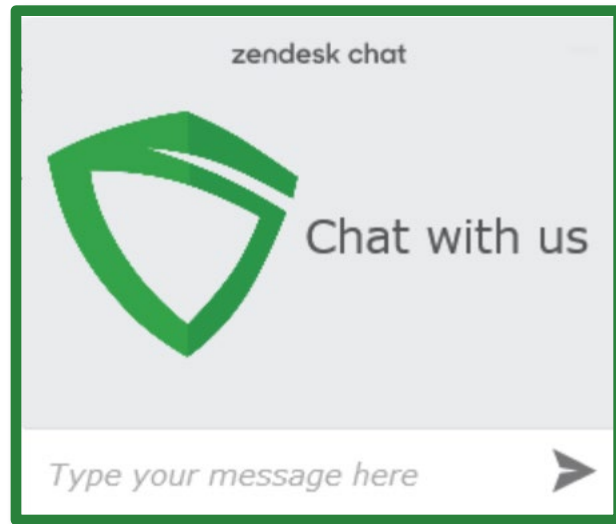


Figure 12: Live Chat Feature

How to Access

The user will navigate to the Metrc Portal to access the Metrc Knowledge Center. The user will be able to see prior interactions between themselves and the agent, as well as see the status of support tickets. The user can navigate to the portal login screen by using the link located under the support drop down in the Metrc user interface, or by navigating directly to the webpage at support.metr.com. This screen is shown below in **Figure 13**

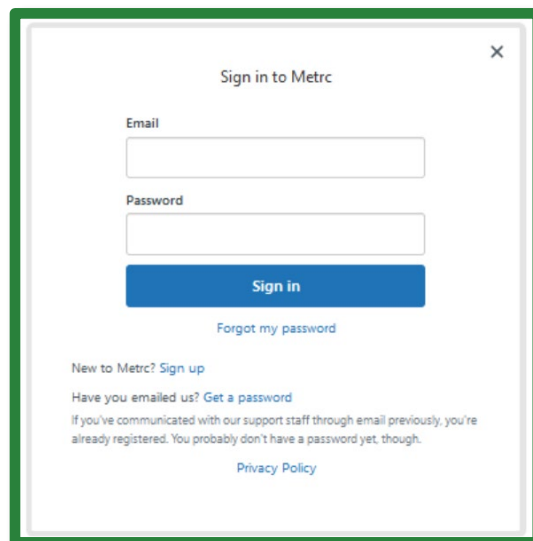


Figure 13: Metrc Portal Login Screen

If the user is not already registered, there is a “Sign Up” link for the user to register their account. This link will prompt an action window where the user will indicate their name and email. This screen is shown below in **Figure 14**.

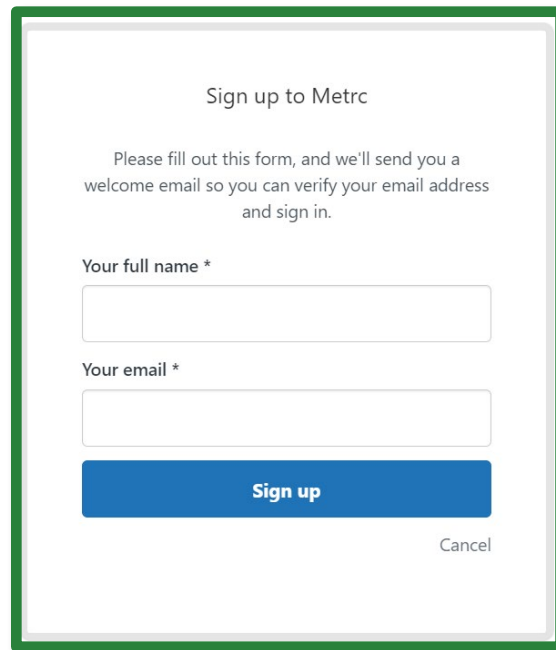
A screenshot of a web registration form titled "Sign up to Metrc". The form is enclosed in a green border. It contains a heading "Sign up to Metrc", a paragraph "Please fill out this form, and we'll send you a welcome email so you can verify your email address and sign in.", two input fields labeled "Your full name *" and "Your email *", a blue "Sign up" button, and a "Cancel" link at the bottom right.

Figure 14: Metrc Portal Registration Window

Please Note: Users will NOT use their Metrc credentials to try and enter the portal as they are not tied together and will need to register their account before logging in. If the user has already emailed support, they can use the “Get a Password” link on this screen.

Helpful hints for submitting a support request

Whenever reaching out to Metrc support by phone, email, or chat, it is helpful for our team to address your tickets faster if the following information is provided with the initial communication from the user:

Full name

Business license number

Username in Metrc

Phone number

Email address

Please feel free to contact support at support@metrc.com or 877-566-6506 with any questions.