Metrc Support Bulletin

Bulletin Number: CA_IB_2022_004	Distribution Date: 11/3/2022	Effective Date: 11/3/2022
Contact Point: Metrc® Support	Subject: Metrc Learn and Metrc Knowledge Center	
Reason: Metrc is providing guidance on how to register for Metrc Learn as well as how to access the Metrc Knowledge Center and Chat functions.		

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 their knowledge through tests. Users will even be able to export and share their completed trainings for future reference.

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 Support Bulletin

Metrc Learn – An Interactive Learning Management System

Metrc Learn is designed to provide users with a better understanding of the available functions within Metrc so they can effectively use the system. Metrc Learn is organized into facility type function-specific programs that are made up of various courses. For example, the Cultivator program includes 15 courses, such as "Creating an Immature Plant Batch," "Tracking Additives," and "Reporting Waste."

At this time, Metrc Learn offers four journeys related to the following license types and functions—Cultivation, Manufacturing, Sales, and Testing. Additional journeys and courses are currently under development.

To access Metrc Learn, the user will register their account (Metrc Learning Registration), and be sent an email invitation to set their password. If a user is working in multiple states or holds multiple licenses, we ask that users register for the program that reflects the area they are seeking training on. You will have the option to add additional trainings following your registration. This registration page is shown below in **Figure 1**.
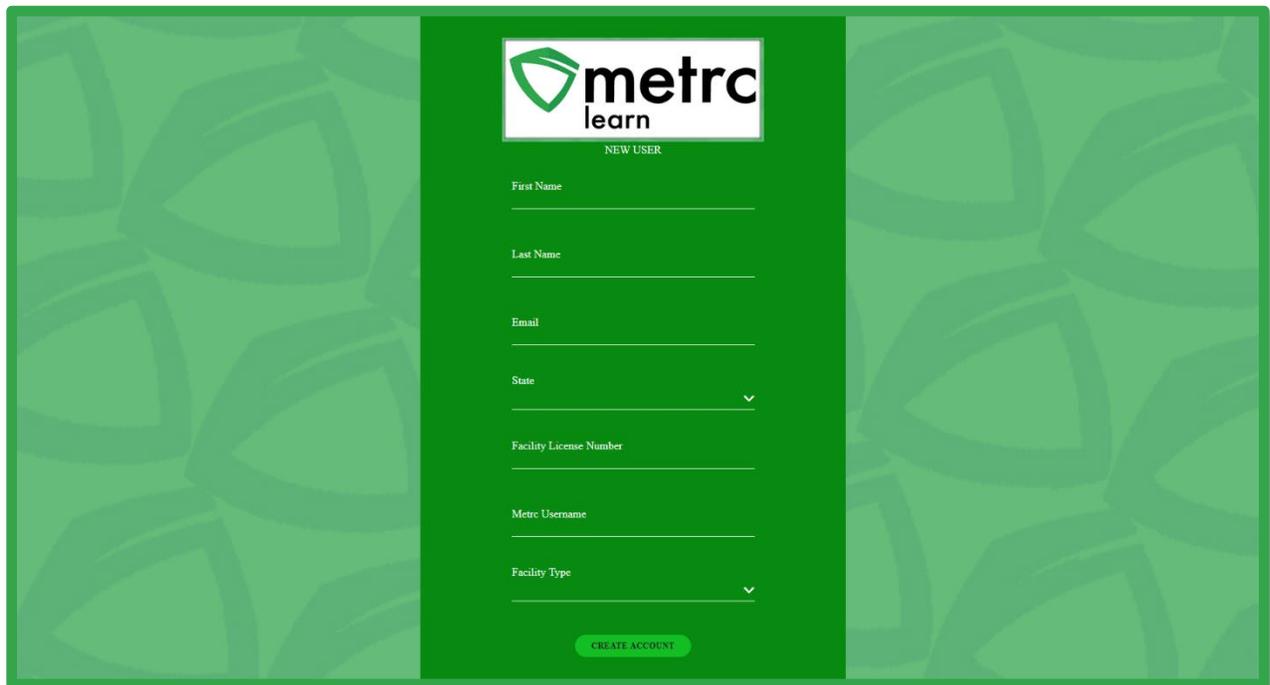

Figure 1: Metrc Learn Registration Page

Please Note: *To register, users are encouraged to use an email they will have access to regardless of business association to ensure training transcripts are accessible.*

Course trainings are interactive and iterative to 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**.
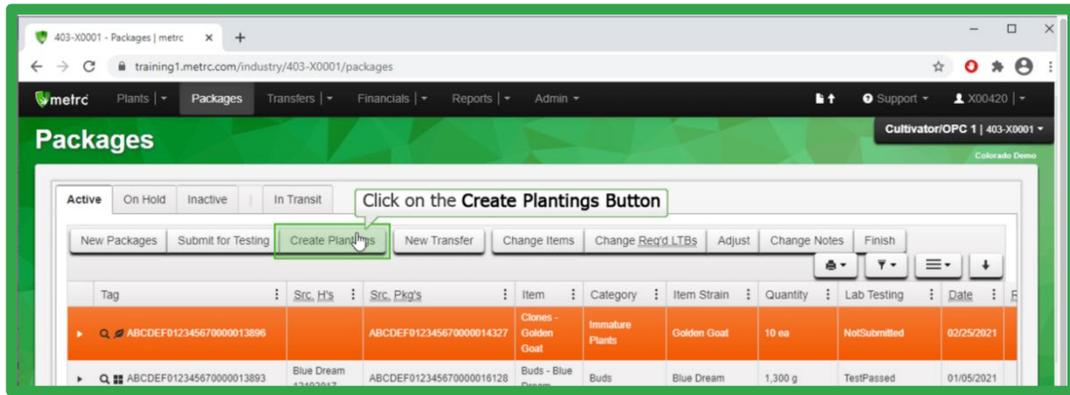

Figure 2: Demonstration Example

After viewing the demo, users get to try it themselves. As they practice, users will receive prompts and guidance to correct any errors. They can review the demo and try it themselves <u>as many times as they'd like</u>. This feature is shown below in **Figure 3**.
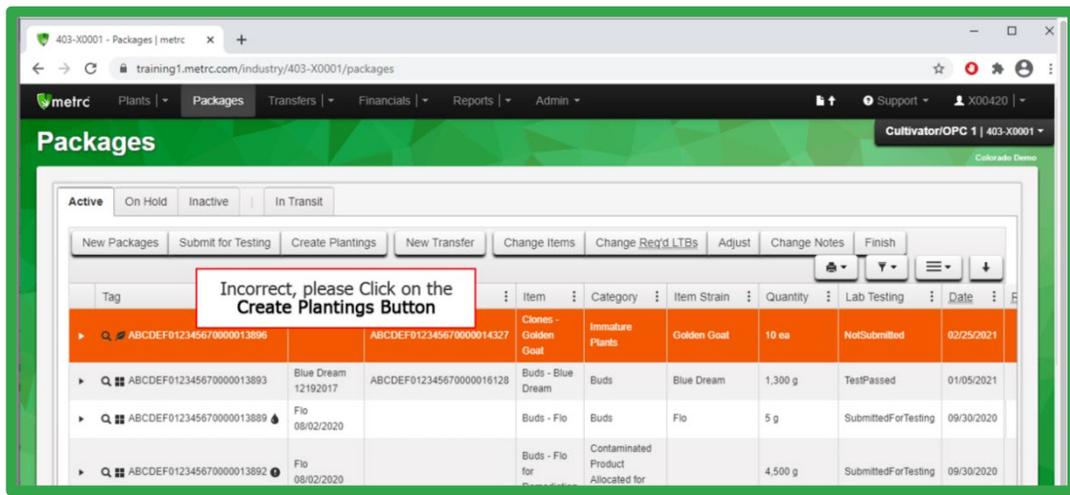

Figure 3: Interactive Demo Example

Users can either self-select or be assigned programs and can take each course 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 take a comprehensive quiz, which they must pass with a score of 70% or higher before the program is considered complete.

Metrc Learn tracks and displays all completed coursework. Users will receive certificates upon completion of a program. Users can print transcripts of 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 many 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.**
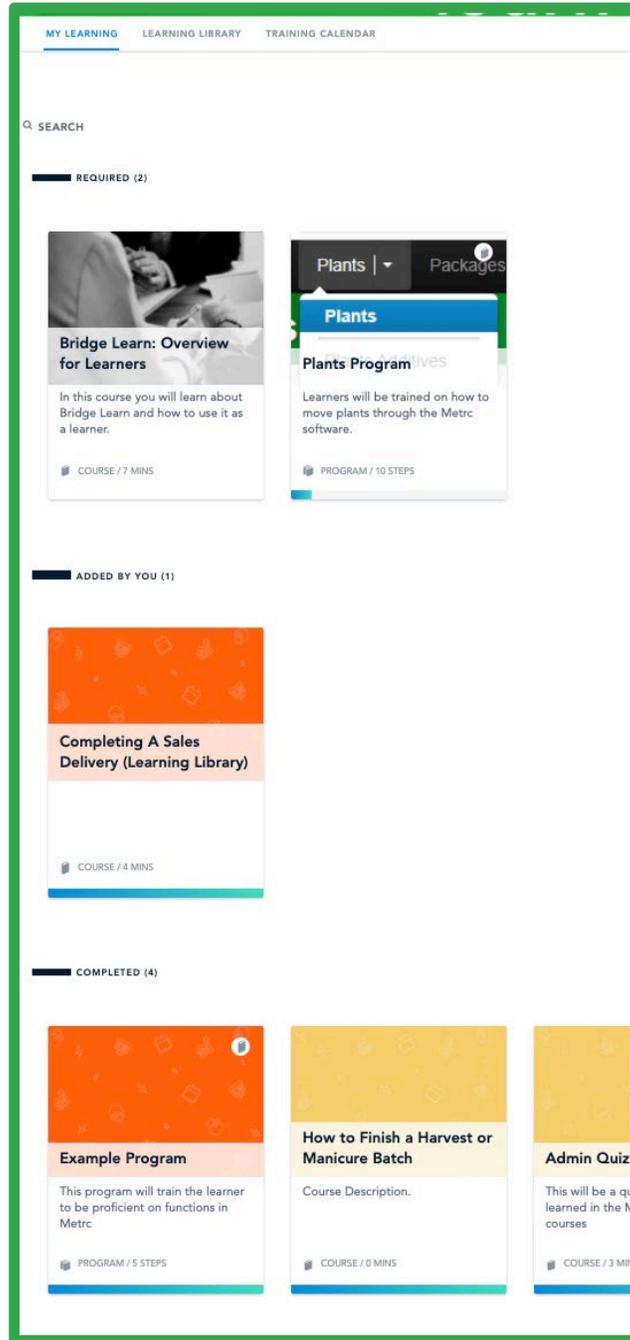
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Figure 5: Learning Library

Metrc Knowledge Center

The 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 and, in the future, best practices and an FAQ.

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

To find information related to your state, enter the item you are looking for in the search and click on the name of the state. If you want all the resources related to that state, click on the name of the state. This can be seen in below in **Figure 6**.
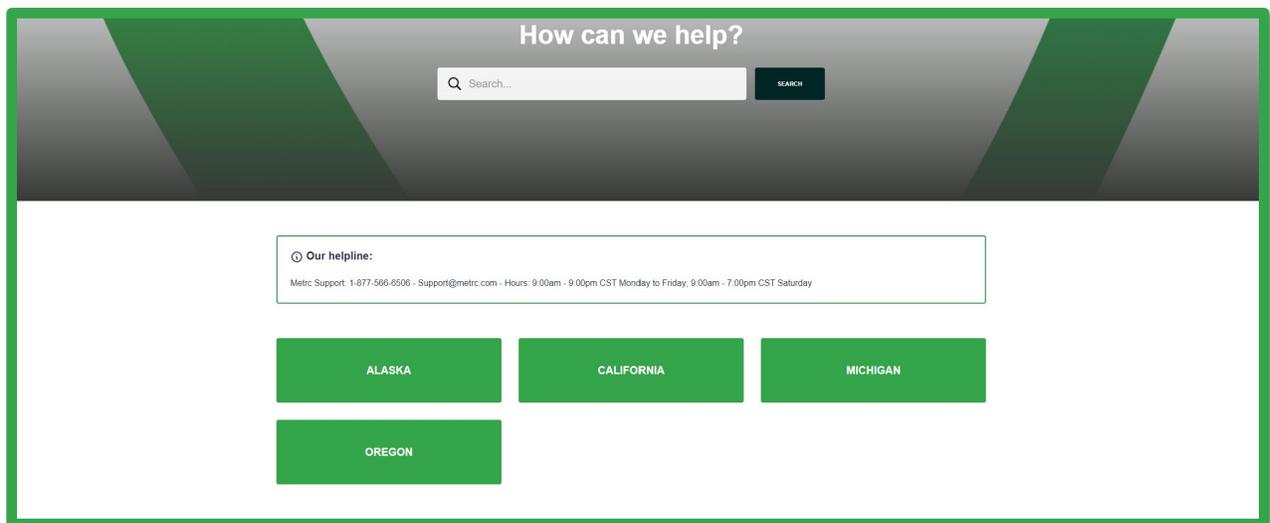
Figure 6: Knowledge Center Search Bar and Bulletin Repositories

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**.
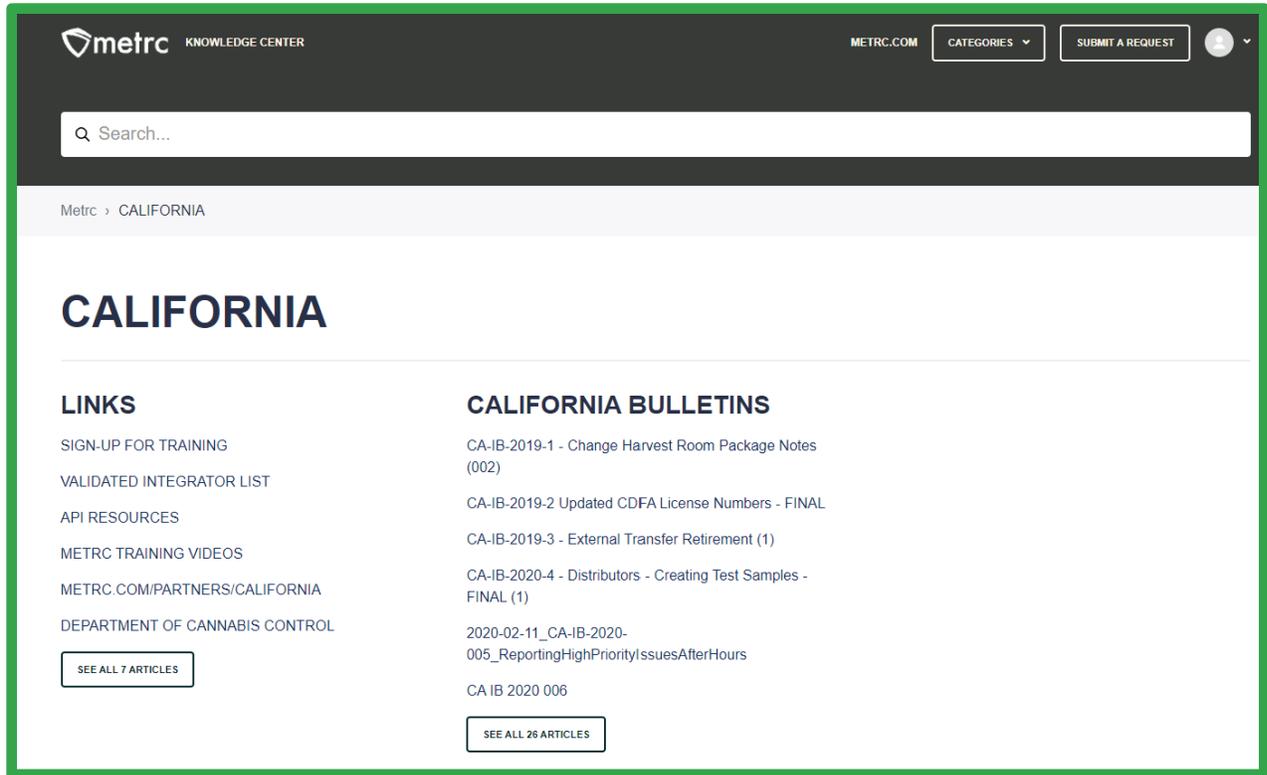
Figure 7: State Page Example

Once a bulletin has been selected, it will take you to the bulletin page. The user can view the bulletin by clicking on it, and can also 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**.
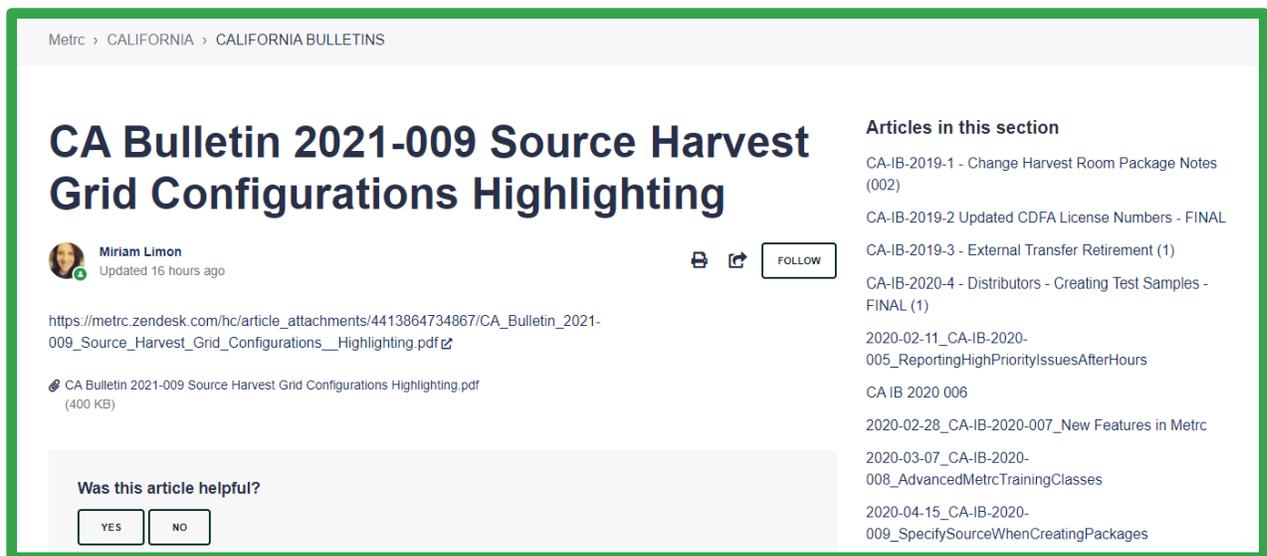
Figure 8: Bulletin Page

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**.
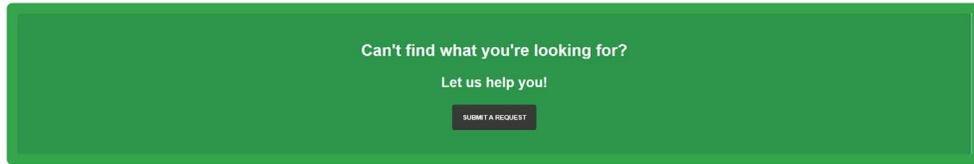

Figure 9: Submit a Request Button

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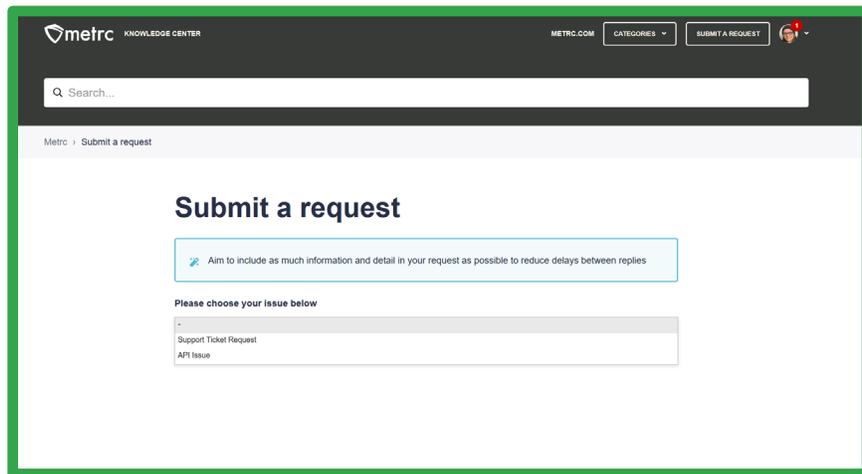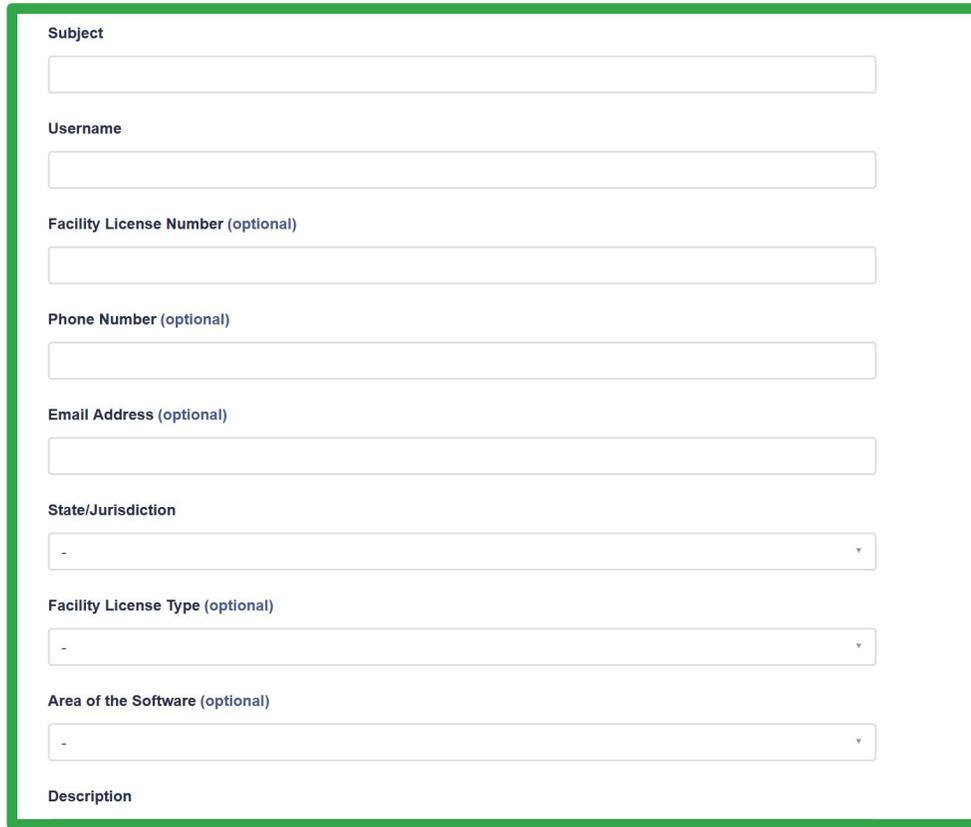

Figure 10: Submit a Request Landing Page

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**.

Figure 11: Support Ticket Submission Form

Zendesk Answer Bot

The Answer bot is located in Metrc Support response emails to refer them over to the Knowledge Center. It is an AI function that improves with user input. It is connected to information stored in the Knowledge Center. Should the licensee need additional help, they can utilize the chat to connect directly with support staff, have a phone call with the support team, or send an email.

Live Chat

Live Chat is another feature available through the Knowledge Center. This feature allows licensees to chat with agents in real-time. To access this feature, the user will click the icon and be prompted to begin chatting with an agent. The chat feature will ask some basic questions like the full name and phone number of the user, and relay that information to the agent. This is shown in **Figure 12**, below.
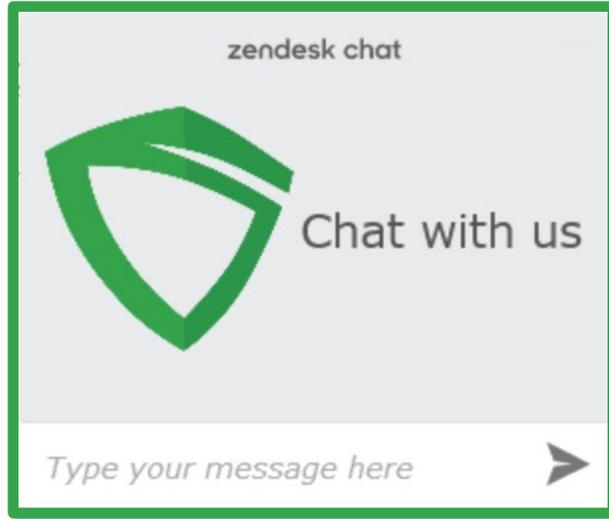
Figure 12: Live Chat Feature

How to Access

Metrc Portal is the access to the Metrc Knowledge Center for the licensees to login and see their own individual tickets. The user will be able to see their interactions with agents.

The user can navigate to the portal login screen by using the link located under the support drop-down menu in the Metrc user interface or by navigating directly to the webpage at support.metrc.com. This screen is shown below in **Figure 13**.
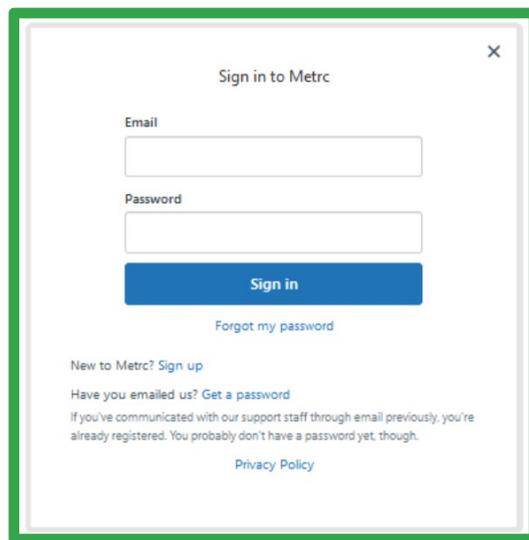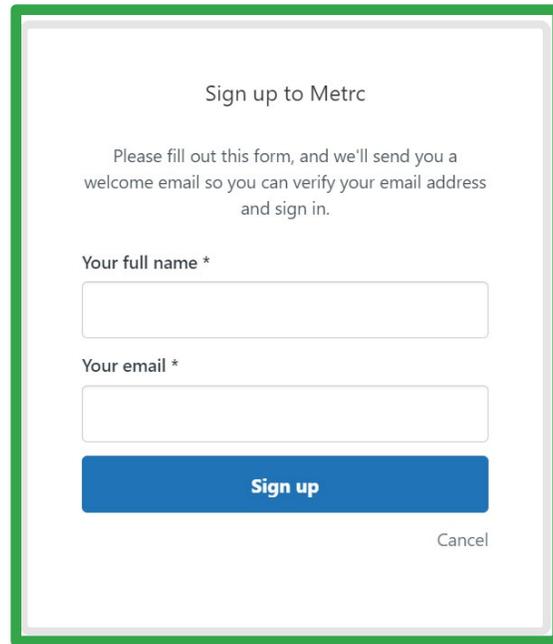

Figure 13: Metrc Portal Login Screen

If not already registered, the user will use the "Sign Up" link 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**.

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. Users 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

When reaching out to Metrc Support by phone, email, or chat, users can help get their queries answered more quickly by providing the following information:

Full name

Business license number

Username in Metrc

Phone number

Email address

Please contact Support at support@metrc.com *or 877-566-6506 with any questions.*