

<b>Bulletin Number:</b> CA-IB-2023-005	<b>Distribution Date:</b> 7/27/2023	<b>Effective Date:</b> 7/24/2023
<b>Contact Point:</b> Metrc Support	<b>Subject:</b> New updates now available in Metrc	
<b>Reason:</b> New functionality and features are now available in Metrc.		

Greetings Metrc® users,

Metrc is pleased to provide information on the latest system enhancements that will be available on 7/24/2023, including:

- Password Reset Fix and Self-Serve Guidance
- Auto-Sum Button in New Packages Template
- Editing Employees Across Multiple Facility Licenses
- Enhancements to Updated Data Import

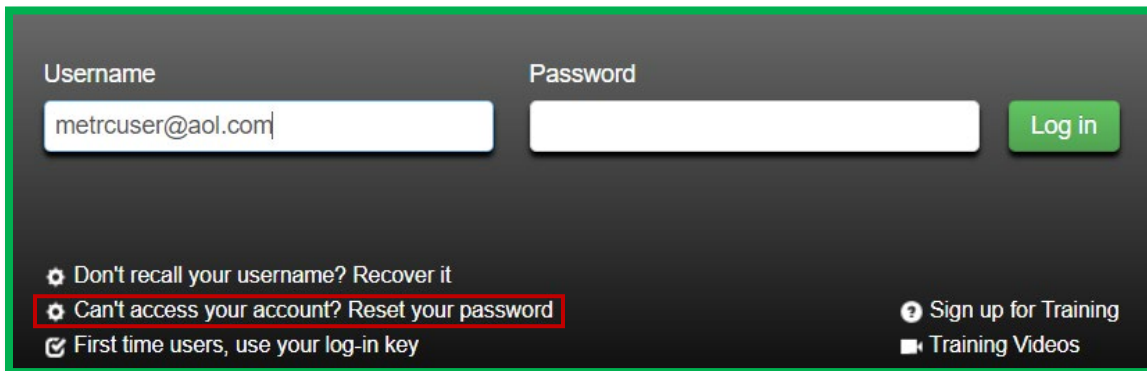
Please read on for more information regarding this new functionality.

### **Password Reset Fix and Self-Serve Guidance**

When resetting your password, the password must meet a minimum set of requirements to be accepted by the system. Previously, if you entered a password that did not meet the requirements, you were redirected to a screen that read “An error occurred” with no further information on what the error was or how to correct it. Now, when you enter a password that does not meet the requirements, you will receive a pop-up window notifying you the password does not meet the requirements. The minimum requirements for an acceptable password are:

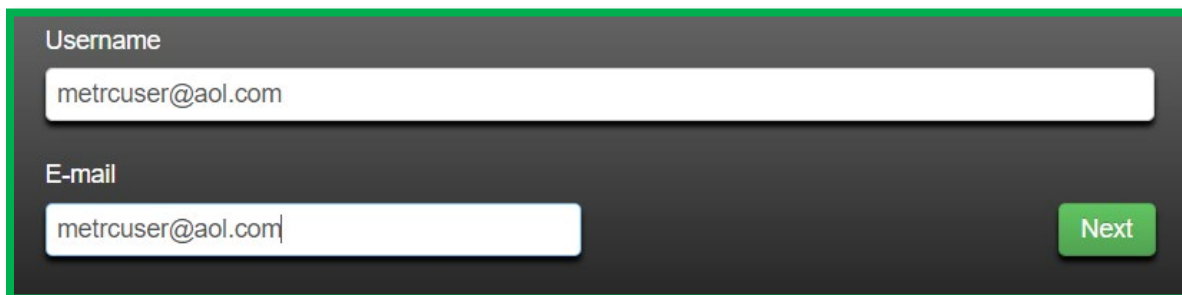
- At least eight characters
- A combination of uppercase and lowercase letters
- At least one number
- At least one special character (e.g. !@#%&\*)

Metrc makes it easy for users to reset their passwords without the need to contact support for assistance. On the login page, click the link with a white gear icon next to it that reads Can't access your account? Reset your password as seen in **Figure 1**.



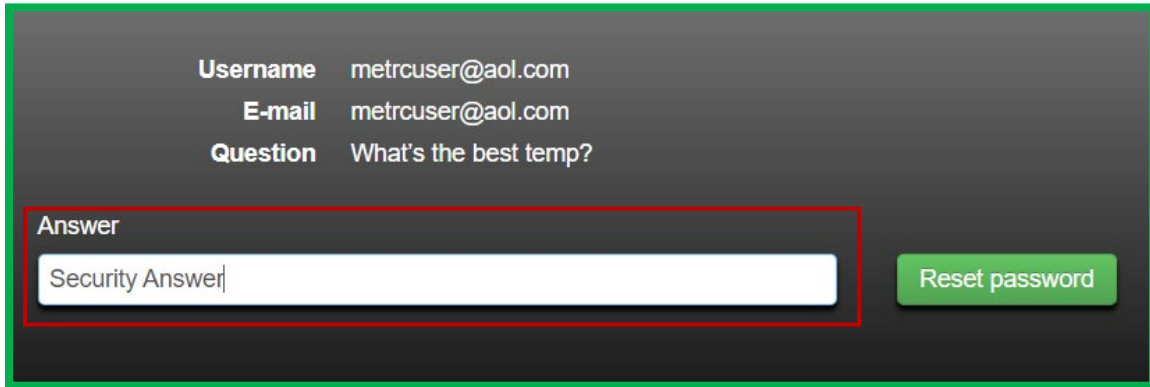
**Figure 1: Link to Reset Password**

You will be redirected to a page requesting your Username and E-mail. Fill these in and click the green Next button as seen in **Figure 2**.



**Figure 2: Required Username and E-mail Fields**

To ensure that your account is only reset by you, the final step in the password reset process requires you to answer your security question. Answer the question correctly and click the green Reset password button to complete the process as seen in **Figure 3**.



The screenshot shows a dark grey form with a green border. At the top, it displays the following information:

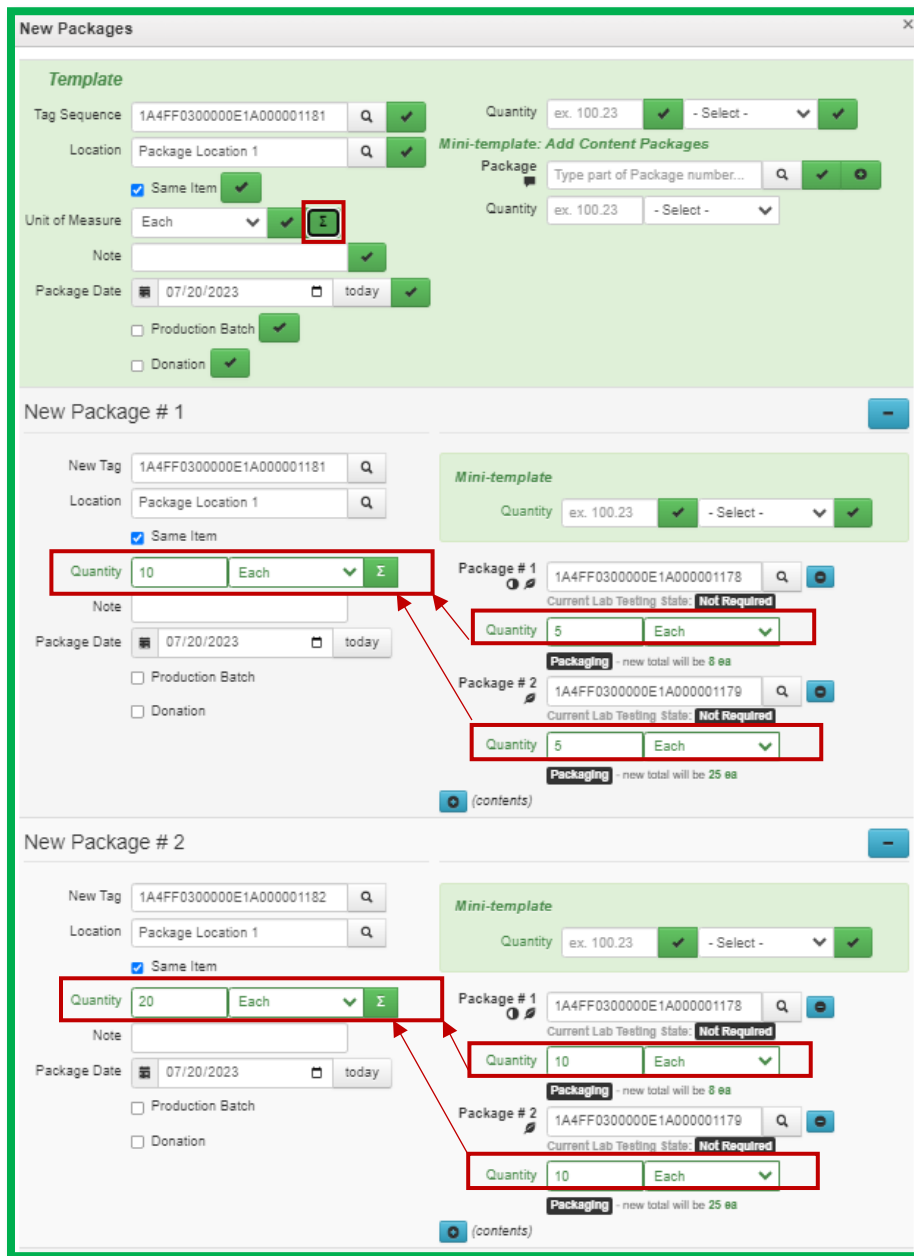
<b>Username</b>	metrcuser@aol.com
<b>E-mail</b>	metrcuser@aol.com
<b>Question</b>	What's the best temp?

Below this is a section labeled "Answer" which contains a white text input field with the text "Security Answer|". To the right of the input field is a green button with the text "Reset password". A red rectangular box highlights the "Answer" section, including the input field and the button.

**Figure 3: Security Answer Field to Verify Reset**

### Auto-Sum Button In New Packages Template

The auto-sum button in the *Template* that displays when creating multiple packages in a single transaction on the *New Packages* action window is now operating correctly. The auto-sum feature automatically populates the sum the of the quantities taken from the selected source package(s) in the quantity field for each new package. When using the auto-sum feature, users can also toggle between any selectable unit of measure for the new package so long as the source package(s) have a compatible unit of measure (Weight, Count, or Volume).



**Figure 4: Auto-Sum Functionality in New Packages Action Window**

## Editing Employees Across Multiple Facility Licenses

Like the *Add Employee* action window where a new employee can be added to multiple facilities simultaneously, the *Edit Employee* action window has been updated to include a list of facilities where the same profile settings can be applied by marking the appropriate checkboxes. **Figure 5** shows the updated action window.

The screenshot shows the 'Edit Employee' window for Christopher Bacon. The window is titled 'Employee # 1' and includes a '(clear)' button. The employee's name is 'Christopher Bacon' and his email is 'metrcuser@aol.com'. The 'Enable online access to this Facility' checkbox is checked. The 'Employment' section has 'Manager at this Facility' checked. The 'Permissions' section is partially visible. The 'Packages Page' section includes 'Grids (reg'd)' (View), 'Inventory' (Manage), 'Create/Submit/Disc.' (Manage), and 'Notes' (Manage). The 'Transfers Menu' includes 'Licensed & External' (Manage) and 'Templates' (Manage). The 'Sales Menu' includes 'Sales' (Manage) and 'Sales Delivery' (Manage). The 'Trips Menu' includes 'All' (View, Manage). The 'Financials Menu' includes 'All' (Manage). The 'Reports Menu' includes 'All' (View). The 'Admin Menu' includes 'Tag Orders' (Manage), 'Tags' (Manage), 'Strains' (Manage), 'Items' (Manage), 'Transporters' (Manage), 'Employees' (Manage), and 'Operational Exception' (Manage). The 'Search Menu' includes 'Caregiver Status Lookup' (View). A red box highlights a list of facilities on the right side of the window, each with a checkbox: 'A Non-Cultivation Microbusiness | C12-2020616-LIC', 'Alliance Farms | CCL19-0000506', 'Cannabis Mart, Inc | C10-1000003-LIC', 'Cultivation Microbusiness | C12-2020615-LIC', 'Lily's Green Sales | C9-0000004-LIC', 'Lily's Micro Grow | C12-0000002-LIC', and 'THE RIGHT WAY WEED | C10-0000015-LIC'. Below this list are 'Check all' and 'Check none' buttons. At the bottom of the window are '+ 1' and 'Save Employees' and 'Cancel' buttons.

**Figure 5: New Facility List for Editing Employees**

## **Enhancements to Updated Data Import**

Earlier this year Metrc introduced a new CSV import process that allows for larger CSV files to be uploaded. This new process removes the current 500-row limit on uploads and allows for CSV files up to 1 MB in size to be uploaded. Imported CSV files are automatically uploaded into a queue to allow users to upload one or more CSV files. Users can log out or work in other areas of Metrc and return to the data import area later to view the status of their import requests.

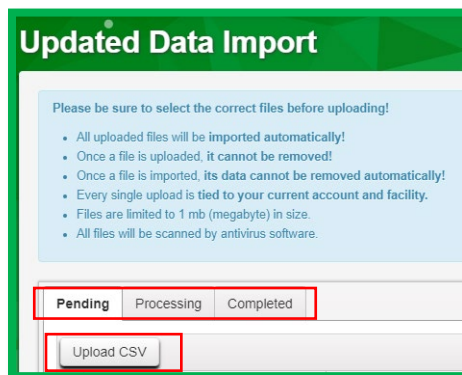
Users currently have two data import options available in the top navigation bar. The option to the right, highlighted in green in **Figure 6**, opens the new *Updated Data Import* page. All licensees are encouraged to begin using this option to access the new functionality described below.



**Figure 6: Data Import Options in Top Navigation**

\*\*\*New\*\*\* This functionality was not previously available to testing laboratories, but recent updates to the tool allow testing laboratories to import lab test results.

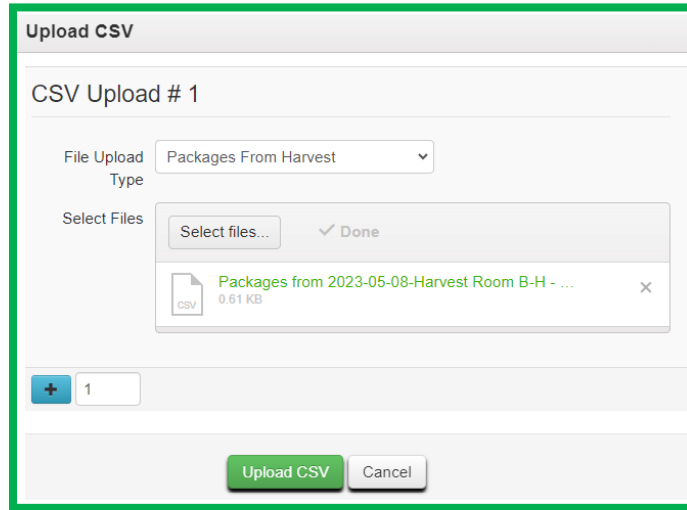
The *Updated Data Import* page is designed to improve the user experience and allow users to track the status of their import requests using the three tabs shown in **Figure 7** below:



**Figure 7: Updated Data Import Page**

**Pending Tab:** CSV imports are initiated from the *Pending* tab by selecting the *Upload CSV* button highlighted in **Figure 7** above.

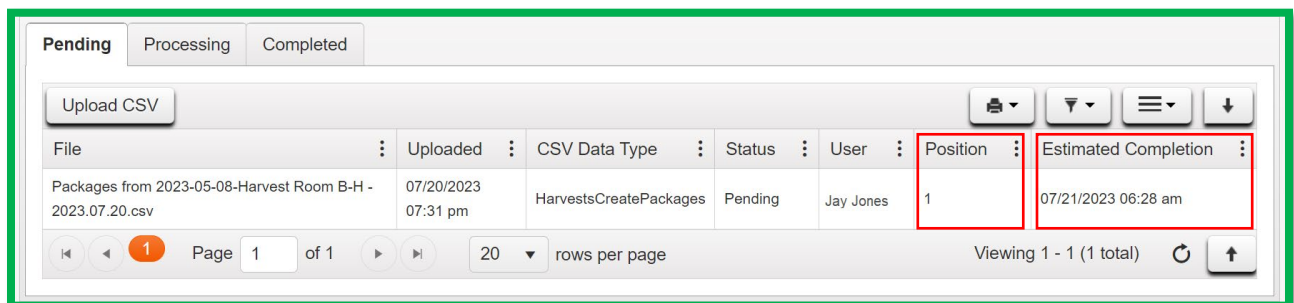
The *Upload CSV* modal, as shown in **Figure 8** below, allows the user to select the applicable *File Upload Type* from a drop-down list and either use the *Select files* button to browse their device to choose the CSV file to be imported or drag and drop the CSV file to be imported into the *Select files* area of the modal.



**Figure 8: Upload CSV Modal**

Once the *Upload CSV* button is selected, the import request displays as a row on the *Pending* grid until processing begins. The *Pending* tab includes a *Position* column which indicates where the file stands in the processing queue. In **Figure 9** below the *Position* value indicates the upload is number 1 in the queue.

\*\*\*New\*\*\* An *Estimated Completion* column has been added to the *Pending* grid.



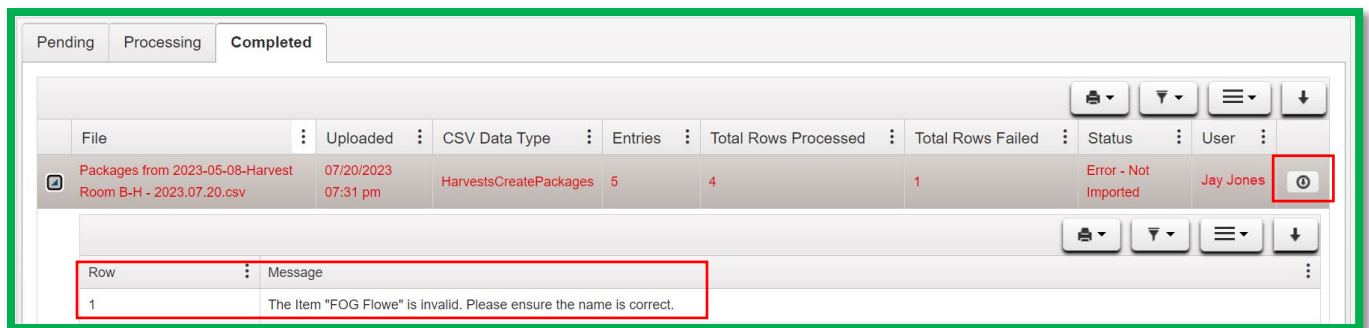
**Figure 9: Pending Tab**

**Processing Tab:** While being processed, the import request is displayed on the *Processing* tab.

\*\*\*New\*\*\* An *Estimated Completion* column has been added to the *Processing* grid. In addition, an email is generated to the user as soon as processing has begun. The email includes an updated estimated completion time.

**Completed Tab:** When processing of an import request is completed, the request displays on the *Completed* tab, along with the *Total Rows Processed*, *Total Rows Failed*, and an overall status indicating either *Successfully Imported* or *Error – Not Imported*.

For all imports except *Lab Test Results*: Metrc processes any rows it can rather than rejecting the entire file due to errors on a subset of the rows in the file. Metrc creates a CSV file containing just the failed rows. The user can download the CSV file using the download button highlighted in **Figure 10** and then refer to the error messages in the drilldown to resolve the issues prior to submitting a new request to process the corrected rows.



**Figure 10: Completed Tab – Download Button and Error Messages**

\*\*\*New\*\*\* For the *Lab Test Results* import: If errors are detected on any row for a specific lab sample package, none of the rows for that lab sample are processed. Metrc creates a CSV file containing all the rows for that lab sample. The user can download the CSV file using the download button highlighted in **Figure 10** above and then refer to the error messages in the drilldown to resolve the issues prior to submitting a new import request. Rows without errors are listed in the drilldown with a message indicating “No Error”.

\*\*\*New\*\*\* An email is generated to the user as soon as processing has completed. The email includes information about any errors found while processing the file.



### **Metrc Resources**

Additional resources are available in the Metrc system in the Support dropdown located in the upper right corner of the navigational toolbar and can be utilized to access the Metrc Manual/User Guide, California Supplemental Guide, and other helpful information.

In addition, on-demand training is available in [Metrc Learn](#), an interactive learning management system, and the [Metrc Knowledge Center](#), a portal that provides on-demand access to various resource materials, including past bulletins and other helpful links.

If you have questions regarding information included in this bulletin, please contact Metrc Support at 877-566-6506 or [support@metrc.com](mailto:support@metrc.com) and provide your license # and Metrc username to aid in the inquiry process.