Metrc Support Bulletin

Bulletin Number: OH_IB_48: Upload Queuing Functionality	**Distribution Date:** 11/03/2023	**Effective Date:** 11/13/2023
Contact Point: Metrc Support	**Subject:** CSV Upload Queuing Functionality	
Reason: New functionality available soon in Metrc		

Greetings,

Metrc is pleased to provide information on enhancements to updated data import that will be available on November 13th, 2023.

Please read on for more information regarding this new functionality.

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For additional support:
Email Support@metrc.com or call 877-566-6506

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Enhancements to Updated Data Import

To improve workflows, and in response to industry requests, Metrc has developed an improved CSV import experience that allows for larger CSV files to be uploaded. This improved 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 at a time. 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.

Now, two data imports options will be available on the navigational toolbar. The icon in orange on the left opens the original upload page that only allows for one upload at a time. The icon in blue on the right opens the improved Updated Data Import page, which is encouraged as a best practice to use to access the new functionality described below – **see Figure 1.**
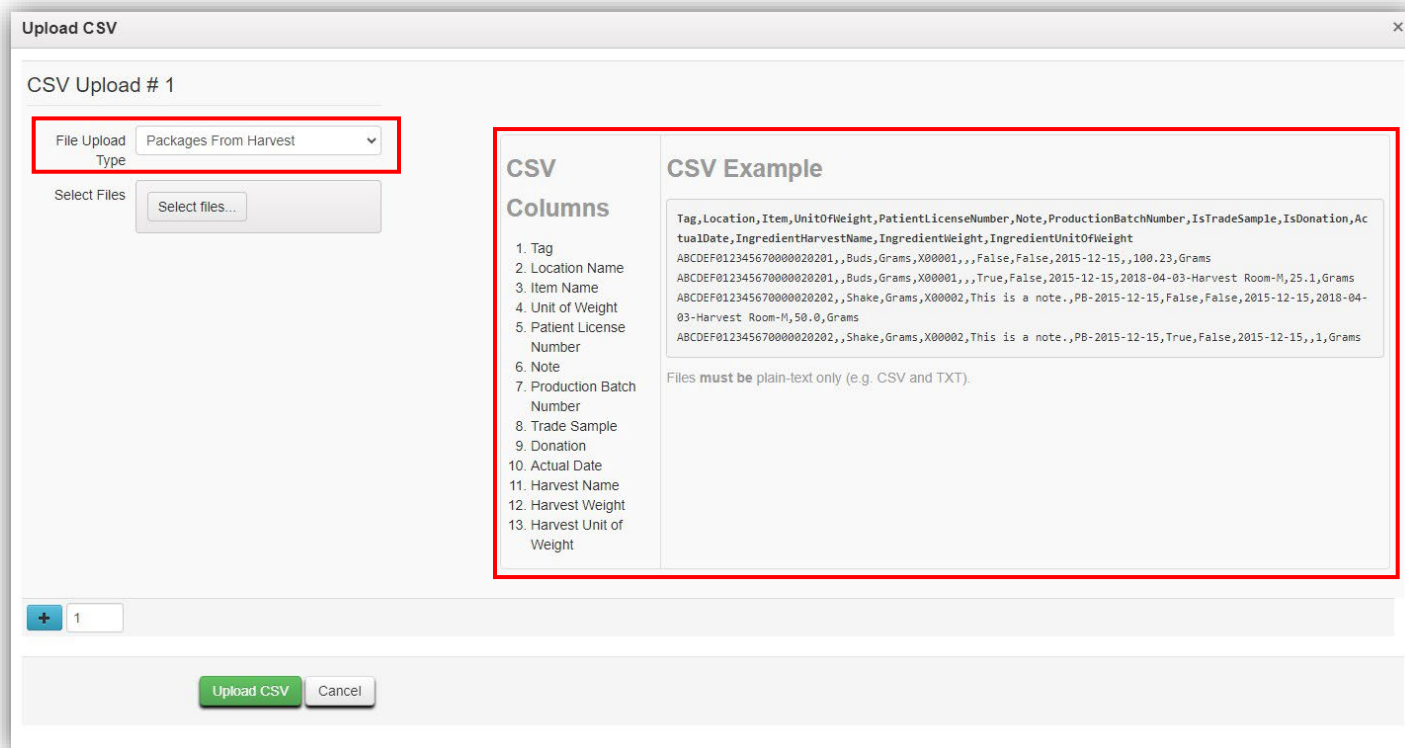

Figure 1: Data Import options in navigational toolbar

The Updated Data Import grid is designed to provide a more efficient experience and allow for status tracking on import requests using the three tabs located at the top of the grid. To initiate the CSV upload, start on the Pending tab and click the Upload CSV button – **see Figure 2**.
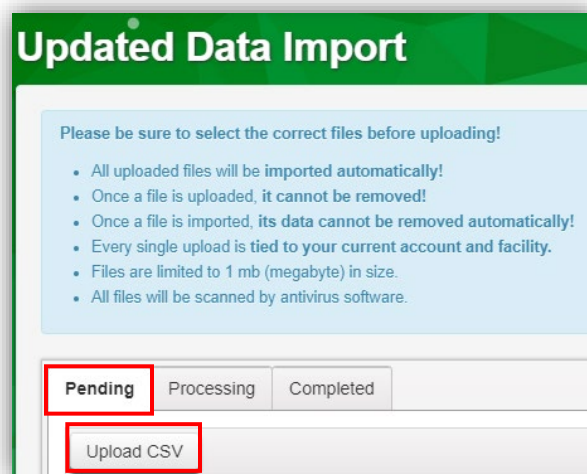
Figure 2: Updated Data Import page

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After selecting the Upload CSV button, the Upload CSV action window will appear. First, select the applicable File Upload Type from the drop-down list. The available list from the drop-down lists the specific options available for the license type the user is working in. Once a File Upload Type has been selected, information clarifying what CSV columns are required and an example of the file type will be shown – **see Figure 3.**

Figure 3: Upload CSV action window & CSV file type information

Then, either use the Select Files button to browse the device to choose the CSV file to be imported, or drag and drop a CSV file into the Select Files area of the action window. Once the CSV file is successfully recognized, the file name will appear in green letters. To initiate the final upload, click the green Upload CSV button – **see Figure 4.**
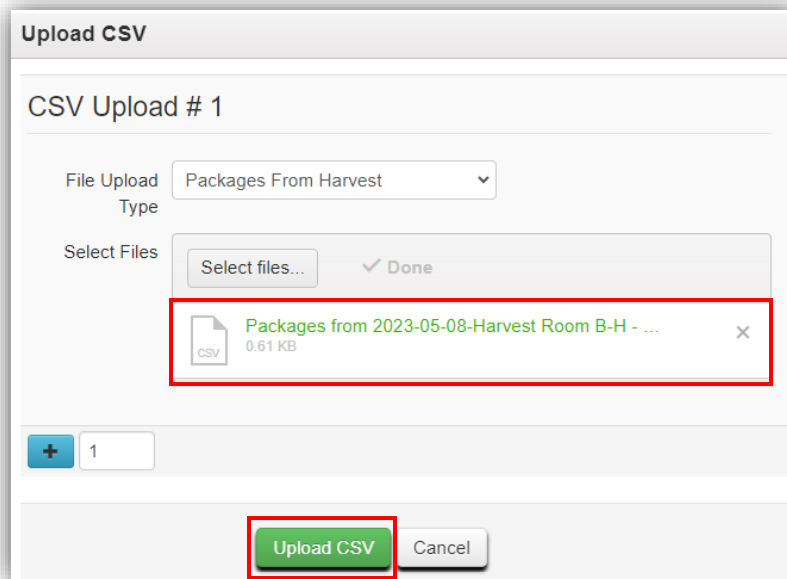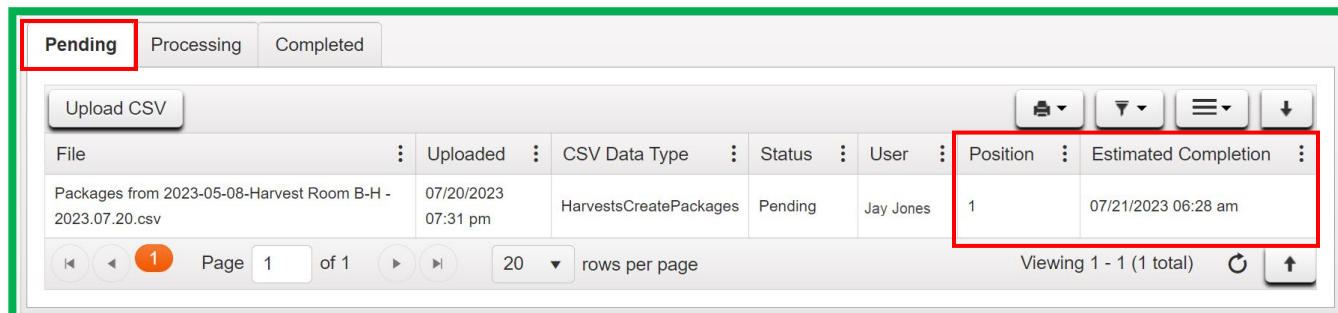

Figure 4: Upload CSV file acceptance

Note: Visibility into the CSV upload status will be available throughout the process. The upload will start on the Pending tab, then move to the Processing tab, and finish on the Completed tab. Details about each tab are provided on the following pages.

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CSV Upload – Pending:

The import request will be displayed as a row in the grid on the Pending tab until processing begins. The Pending tab includes a Position column which indicates where the file stands in the processing queue.

The file being uploaded in this example has a position of 1, indicating the upload is number one in the queue. An Estimated Completion column is also available to provide more transparency into the estimated completion time – **see Figure 5.**
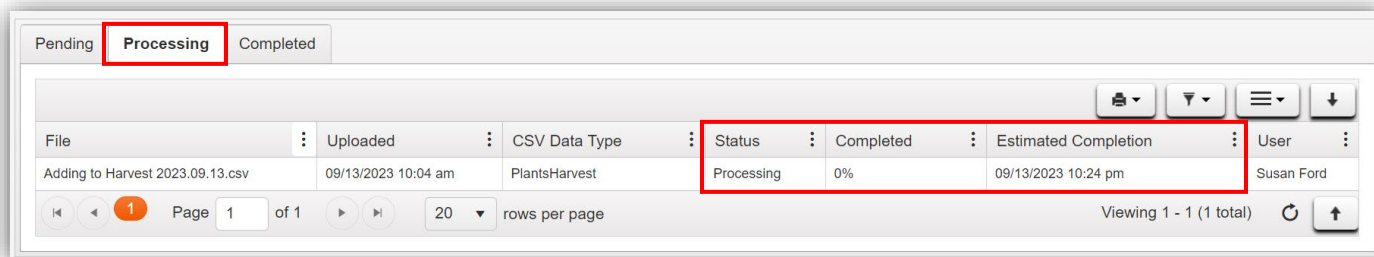
Figure 5: CSV Upload in Pending grid

CSV Upload – Processing:

During this phase, the import request is displayed in the Processing tab grid, which also includes an Estimated Completion column and status of completion percentage – **see Figure 6.**
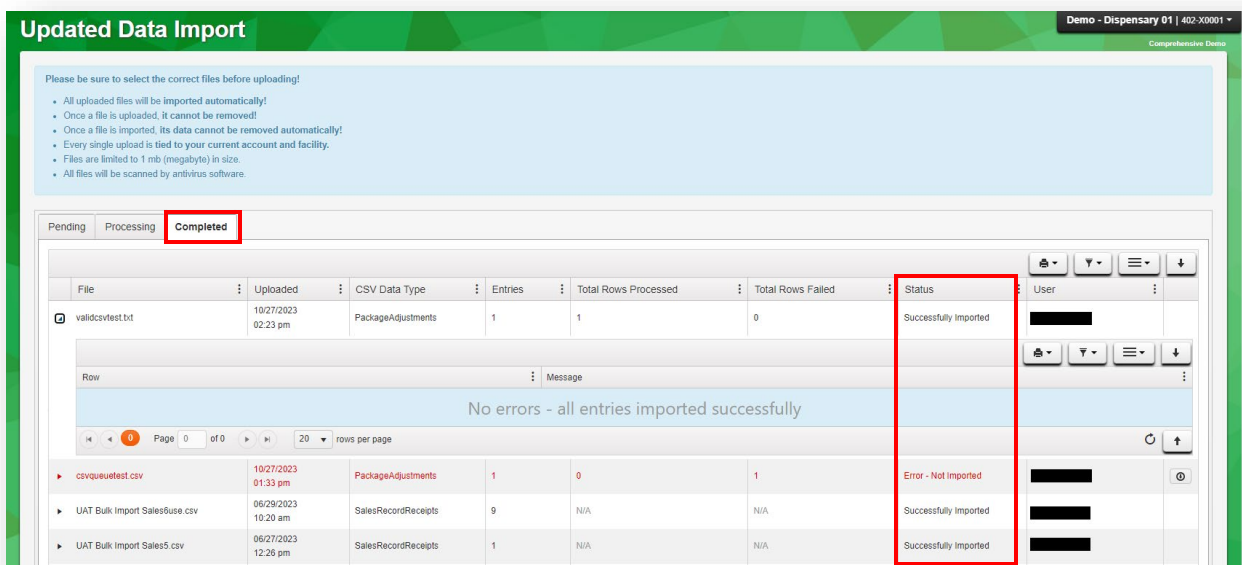
Figure 6: CSV Upload in Processing grid

Once processing has begun, an email will be generated and sent to the user who added the file for upload to notify of the transition from pending to processing. The email includes an updated estimated completion time, if applicable.
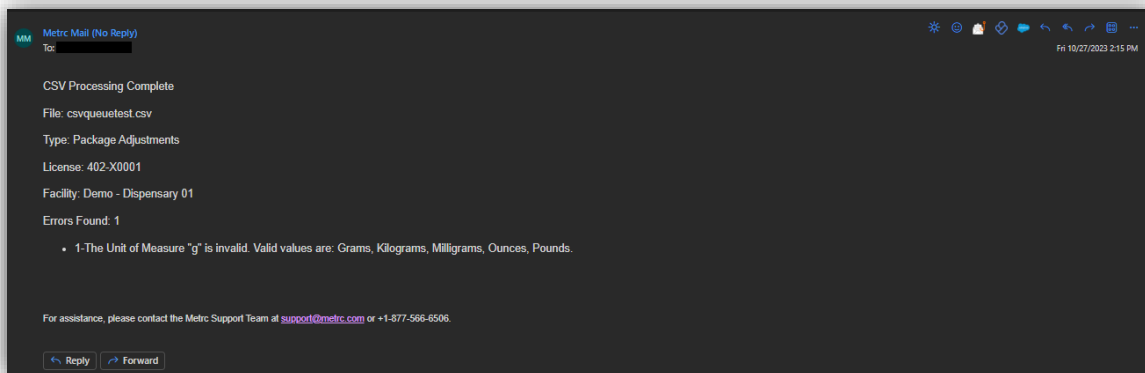
CSV Upload – Completed:

When processing an import request is complete, the request displays on the Completed tab grid. The Completed grid includes columns for information about the CSV upload including Total Rows Processed, Total Rows Failed, and an overall Status indicator displaying either Successfully Imported or Error – Not Imported – **see Figure 7.**

Figure 7: Successfully completed CSV Upload

Once processing is complete, an email will be generated and sent to the user who added the file for upload and include information about any errors found while processing the file – **see Figure 8.**

Figure 8: Example email for CSV upload completed

For all imports except Lab Test Results:

Metrc processes all accurate file data and only rejects incorrect information rather than rejecting the entire file due to a fraction of errors in the file. As a result, the system creates a CSV file containing just the failed rows. To view, use the download button on the right side of the line item in the grid to download the CSV file. Then, refer to the error messages in the drilldown prior to submitting a new request to process the corrected rows – **see Figure 9.**
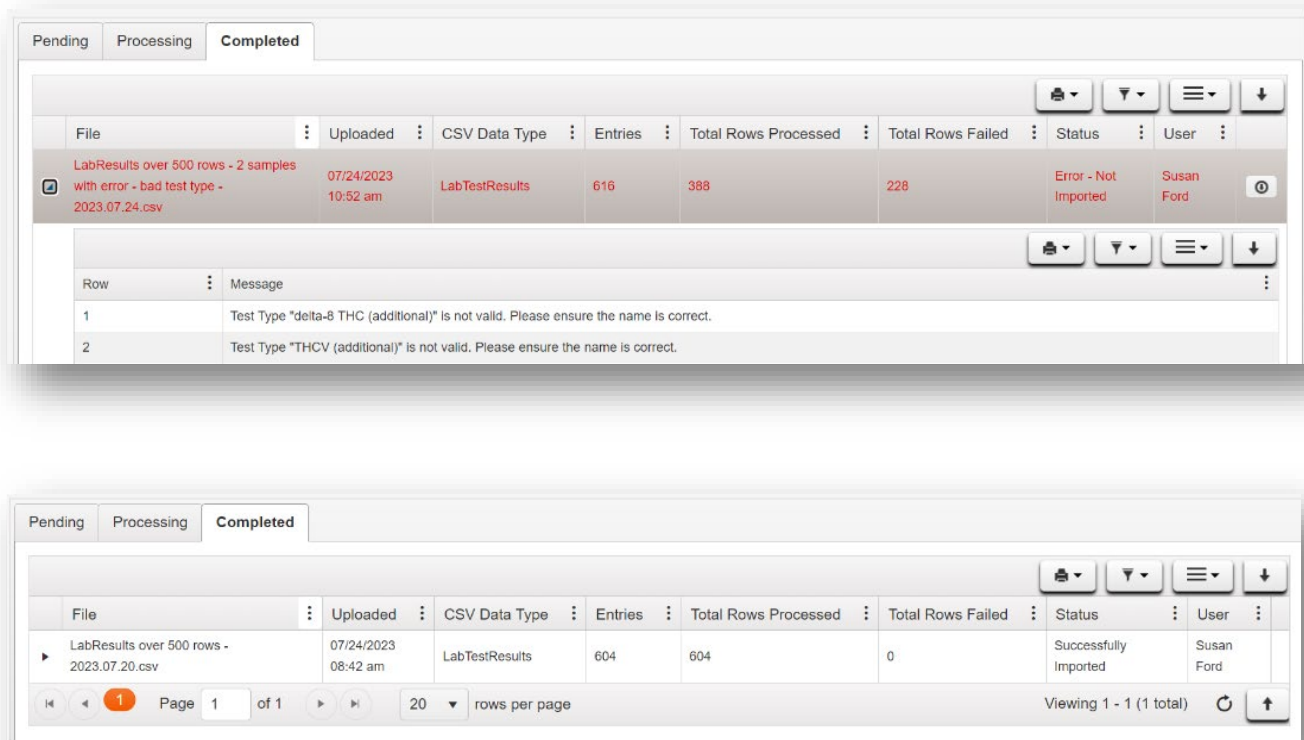

Figure 9: Completed tab – Download button and Error Messages

For Lab Test Results imports:

If errors are detected on any row in the CSV file for a specific lab sample package, no data included in the file will be processed, and Metrc will create a CSV file containing all rows for the lab sample.

To view, use the download button on the right side of the line item in the grid to download the CSV file. Then, refer to the error messages in the drilldown prior to submitting a new import request. Rows without errors are listed in the drilldown with a message indicating "No Error" – **see Figure 10.**

Figure 10: Screenshot of completed upload with both error and error free rows

Metrc Resources

If you have any questions, or need additional support, please leverage the following:

Metrc Support:

Email Support@metrc.com, call 877-566-6506, or log into our Support Portal and navigate to 'Contact Us' to log a ticket or live chat a Support team member.

Metrc Learn training:

Metrc Learn is designed to offer educational opportunities to enhance users' skills with the Metrc system and provides various training options based on experience level. In addition, the learning system is organized into facility-specific programs made up of various courses. To login, visit Metrc Learn and enter your login credentials, or to access, register by visiting the Metrc Learn Registration.

Additional resources:

In the Metrc system, click on the "Support" dropdown in the top-right navigation pane and select the appropriate resource, including educational guides and more.

Thank you for your continued partnership.