

Bulletin Number: SD_IB_15:	Distribution Date: 11/03/2023	Effective Date: 11/13/2023
Contact Point: Metrc Support	Subject: CSV Upload Que	ueing Functionality
Reason: New functionality ar	nd features are now available	e in Metrc

Greetings,

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

Please read on for more information regarding this new functionality.



## **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 in 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 page 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**.

	ure to select the correct files before uploading!
Allunlar	
<ul> <li>All uploa</li> </ul>	ded files will be imported automatically!
	ile is uploaded, it cannot be removed!
	ile is imported, its data cannot be removed automatically
<ul> <li>Every sil</li> </ul>	ngle upload is tied to your current account and facility.
- Filos ara	limited to 1 mb (mogabuto) in size
	limited to 1 mb (megabyte) in size. vill be scanned by antivirus software.
	limited to 1 mb (megabyte) in size. will be scanned by antivirus software.

### Figure 2: Updated Data Import page



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 list is 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**.

pload CSV			
CSV Upload	1 # 1		
File Upload Type Select Files	Packages From Harvest	CSV Columns 1. Tag 2. Location Name 3. Item Name 4. Unit of Weight 5. Patient License Number 6. Note 7. Production Batch Number 8. Trade Sample 9. Donation 10. Actual Date 11. Harvest Name 12. Harvest Weight 13. Harvest Unit of Weight	CSV Example Tag.location, Item, UnitOfWeight, PatientLicenseNumber, Note, ProductionBatchNumber, IsTradeSample, IsDonation, Ac tualDate, IngredientHarvestName, IngredientWeight, IngredientUnitOfWeight ABCDF012345670000020201,, Buds, Grams, X00001,,, False, False, 2015-12-15,, 100.23, Grams ABCDF012345670000020202,, Shake, Grams, X00002, This is a note., PB-2015-12-15, False, False, 2015-12-15, 2018-04- 03-Harvest Room-M, 50.0, Grams ABCDF0123456700000020202,, Shake, Grams, X00002, This is a note., PB-2015-12-15, True, False, 2015-12-15,, 1, Grams Files must be plain-text only (e.g. CSV and TXT).
+ 1	Upload CSV Cancel		

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.** 

Upload CSV	
CSV Upload	d # 1
File Upload Type	Packages From Harvest
Select Files	Select files V Done
	Packages from 2023-05-08-Harvest Room B-H ×
+ 1	
	Upload CSV Cancel

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.



### 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**.

Pending Processing Completed				
Upload CSV			<b>.</b>	<b>▼</b> • <b>■</b> • <b>↓</b>
File	Uploaded : CSV Data Type :	Status : User :	Position :	Estimated Completion
Packages from 2023-05-08-Harvest Room B-H - 2023.07.20.csv	07/20/2023 07:31 pm HarvestsCreatePackages	Pending Jay Jones	1	07/21/2023 06:28 am
Page 1 of 1	► 20 ▼ rows per page		Viewing	1 - 1 (1 total) 💍 🕇

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.** 

							<b>■</b> •
File	:	Uploaded :	CSV Data Type	Status :	Completed	Estimated Completion	User
Adding to Harvest 2023.09.13.csv		09/13/2023 10:04 am	PlantsHarvest	Processing	0%	09/13/2023 10:24 pm	Susan Ford

## 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.** 

	e be sure to select the correct files	before uploading!									
0 0 E	Il uploaded files will be imported auto ince a file is uploaded, it cannot be re ince a file is imported, its data cannot very single upload is tied to your cur iles are limited to 1 mb (megabyte) in s Il files will be scanned by antivirus soft	moved! t be removed automatically! rent account and facility. size.									
end	ting Processing Completed	1									
								A	+		
	File	Uploaded :	CSV Data Type	Entries	Total Rows Processed	: Total Rows Failed	: Status	User :			
4	validcsvtest.txt	10/27/2023 02:23 pm	PackageAdjustments	1	1	0	Successfully Imported				
								[▲•][▼•][≡•]	+		
	Row	Row : Message									
	Page 0 of 0	р 🕨 🕨 20 🔻 го	ws per page					o	+		
•	csvqueuetest.csv	10/27/2023 01:33 pm	PackageAdjustments	1	0	1	Error - Not Imported		٥		
	UAT Bulk Import Sales6use.csv	06/29/2023 10:20 am	SalesRecordReceipts	9	N/A	N/A	Successfully Imported				
•		06/27/2023				N/A	Successfully Imported				

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**.

•	Metrc Mail (No Reply) To:	券 🐵 🏄 🔗 🗭 ५ ६ 🖍 🗃 … Fri 10/27/2023 2:15 PM
	CSV Processing Complete	
	File: csvqueuetest.csv	
	Type: Package Adjustments	
	License: 402-X0001	
	Facility: Demo - Dispensary 01	
	Errors Found: 1	
	<ul> <li>1-The Unit of Measure "g" is invalid. Valid values are: Grams, Kilograms, Milligrams, Ounces, Pounds.</li> </ul>	
L	For assistance, please contact the Metric Support Team at <u>support@metric.com</u> or +1-877-566-5506.	
	🔨 Reply 🥟 Forward	

Figure 8: Example email for CSV upload completed

Metrc LLC For additional support: Email <u>Support@metrc.com</u> or call 877-566-6506



#### 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 drill down prior to submitting a new request to process the corrected rows – **see Figure 9**.

File	:	Uploaded :	CSV Data Type	Entries :	Total Rows Processed	Total Rows Failed	Status : User :
Packages from 2023-05-0 Room B-H - 2023.07.20.0		07/20/2023 07:31 pm	HarvestsCreatePackages	5	4	1	Error - Not Jay Jones
							<b>≜</b> •][▼•][≡•][4
Row	Messag						

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 drill down prior to submitting a new import request. Rows without errors are listed in the drill down with a message indicating "No Error" – **see Figure 10**.

end	ing	Processing	Complete	d													
														0	a-)[7-	][≡•	+
	File			:	Uploaded	:	CSV Data Type	:	Entries	:	Total Rows Processed	:	Total Rows Failed	:	Status :	User	
		ults over 500 ro or - bad test typ 7.24.csv		IS	07/24/2023 10:52 am		LabTestResults		616		388		228		Error - Not Imported	Susan Ford	0
													l	6	a-) [▼-	)=-)	+
	Row		Message														:
	1		Test Type	"delt	a-8 THC (additi	onal	" is not valid. Please e	nsu	re the name l	s co	prrect.						
	2		Test Type	"THO	CV (additional)"	is no	ot valid. Please ensure	the	name is corre	ect.							

											٥.	J - T		<b>■•</b>	+
	File	:	Uploaded	:	CS	V Data Type	:	Entries :	Total Rows Processed	Total Rows Failed	Statu	IS	1	User	:
•	LabResults over 500 rows - 2023.07.20.csv		07/24/2023 08:42 am		Lab	TestResults		604	604	0	Succe	essfully ted		Susan Ford	
14	Page 1 of 1	6	- (H)	20		rows per page	в				Viewin	ig 1 - 1 (1 to	tal)	Ċ	+

### 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 <u>Support@metrc.com</u>, call 877-566-6506, or log into our <u>Support Portal</u> 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 <u>Metrc Learn</u> and enter your login credentials, or to access, register by visiting the <u>Metrc Learn Registration</u>.

#### 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.