

Bulletin Number: MD_IB_0082	Distribution Date: 03/29/2024	Effective Date: 3/31/2024
Contact Point: Metrc Support	Subject: Metrc Learn 2.0, Auto-Finalization, Update to Permissions	
Reason: Metrc Learn 2.0, Auto-Finalization and Update to Employee Permissions		

Greetings,

At Metrc, we remain dedicated to improving users' experience and knowledge through continued innovation and are thrilled to announce the upcoming re-launch of Metrc Learn – our newly enhanced interactive learning management system (LMS).

Thanks to the insightful feedback gained from licensees and state users across the markets we serve, the new and improved Metrc Learn platform has been designed to revolutionize how you learn and grow with Metrc. Our new LMS will play a pivotal role in:

Empowering talent

By offering cutting-edge learning tools and resources, navigating the Metrc system will be easier, creating workflow efficiencies critical to licensed businesses' success.

Driving compliance

In a highly regulated industry, compliance is non-negotiable. The new Metrc Learn LMS will ensure that every licensed user is equipped with the knowledge and resources needed to adhere to industry regulations to further enable improved compliance outcomes.

Please read on for more information on how to leverage the new Metrc Learn to the fullest and begin benefiting from enhanced training, regardless of current Metrc skill level (effective 3/31/2024).

Metrc is also pleased to provide information on the latest system enhancements and functionality updates that are now available, including:

- Auto-Finalization/Finishing (effective 12/27/2024)
 - Auto-finalization of active sales receipts after (7) days since the sale was last edited.
 - Auto-finishing of active zero quantity packages after (30) days since the package was last edited.
- Update to Permissions (effective 3/12/2024)
 - The addition of View permissions to the following areas of the Metrc system
 - Transfers grids
 - Employees section within Admin

Please read on for more information regarding this new functionality.

Metrc Learn overview

Metrc Learn was redesigned to provide users with interactive, educational information on system functionality to expand skillsets and drive workflow efficiencies. Here's what to expect with the initial rollout:

- **Enhanced user experience:** We've revamped the user interface to make learning more intuitive and seamless for a smoother and more visually engaging learning experience.
- **Facility- and role-specific content:** We understand that different facility types and roles within an organization require specialized knowledge and skills. While facility-specific content will be available at launch, we will be introducing role-specific content in the coming weeks and months to address the unique challenges in the industry and objectives of various positions as it relates to the Metrc system.
- **New Business training:** Newly revamped content will now be available.
- **Progress tracking:** Users can export and share a record of training completed. In addition, Managers or Owners can request to become a power user to view what training employees have taken.
- **On-demand mobile experience:** Metrc Learn will now be available through a mobile application to make training more accessible and convenient.

Additional enhancements, new functionality, and updated content are currently in development and when available, more information will be provided.

Accessing the new Metrc Learn

Effective March 31st, the existing Metrc Learn platform and login link will be decommissioned and will no longer work. However, accessing the new [Metrc Learn](#) LMS will be simple through multiple convenient locations:

From within the Metrc system

- Navigate to the Support area dropdown on the navigational toolbar and select "Sign up for Training" to register.

From the Metrc website

- Navigate to your [state's partner page](#) and scroll down to the "Metrc's Training Resources" section to find the link.

Also, save the link – learn.metrc.com – as a bookmark in your preferred web browser. If you have the existing link saved as a bookmark, please replace it with the new link.

Existing Metrc Learn account users:

The Metrc team has already transitioned existing user accounts to the new platform. To explore the new features and improvements available on March 31st, simply take the following steps:

1. Navigate to the Metrc Learn login page using the new link: learn.metrc.com

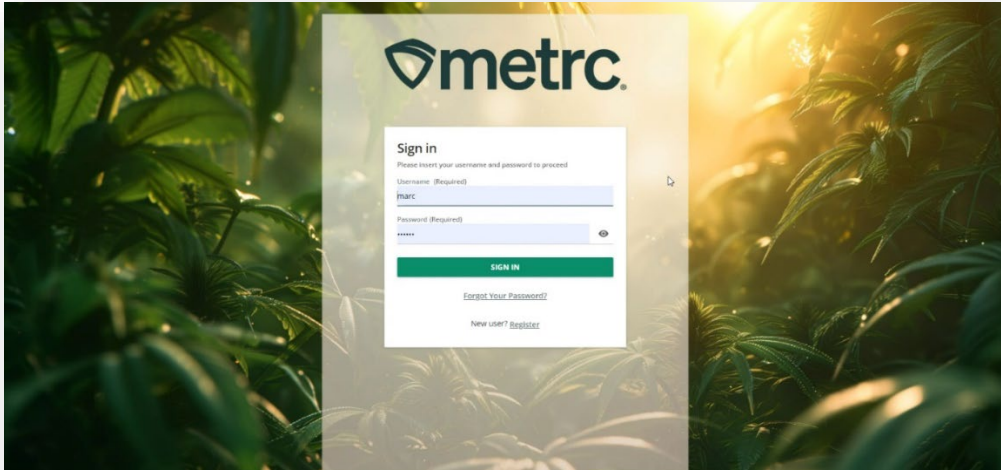


Figure 1: Metrc Learn login page

2. Enter your existing username.
3. Click the “Forgot Your Password?” link

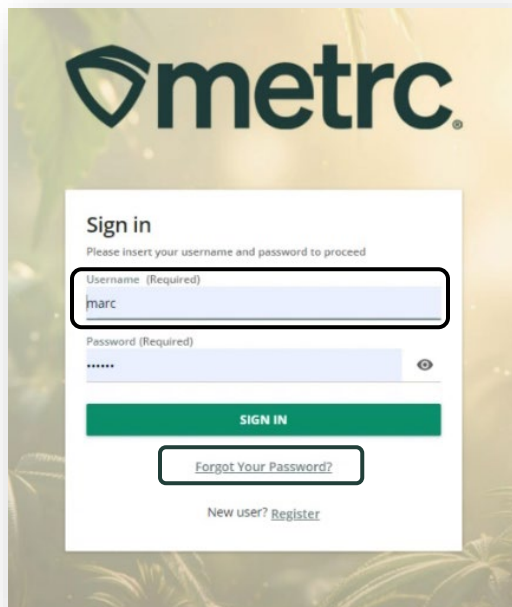


Figure 2: Metrc Learn sign-in and password reset

A password reset link will then be sent to the email associated with the Metric Learn account. Please make sure the new password contains at least 9 characters. For security reasons, the new password must also be different from the last 3 passwords used.

Once the new password is set, return to the [login page](#) and enter the username and new password to access Metric Learn.

New to Metric Learn? Here's how to register:

To register for a Metric Learn account, the following steps should be taken:

1. Navigate to the Metric Learn login page by:
 - Using the new link: learn.metric.com; or
 - From within the Metric system – Navigate to the Support area dropdown menu on the navigational toolbar and select “Sign up for Training”.
2. Click the ‘Register’ link next to ‘New user?’ – **see Figure 3.**

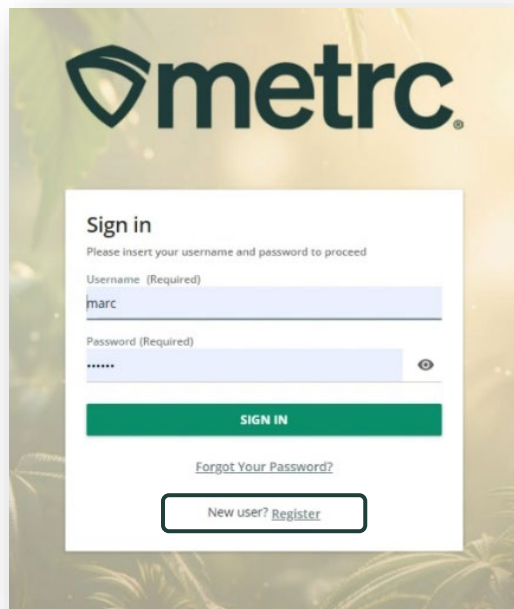
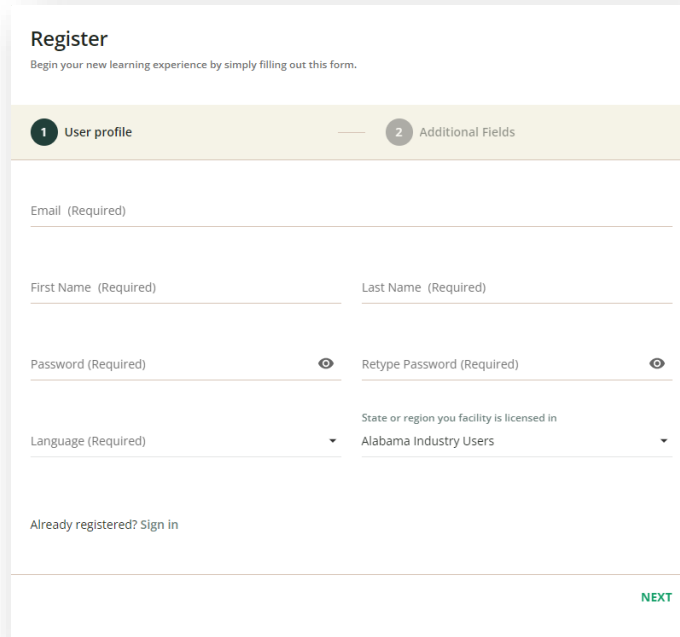


Figure 3: Register for a Metric Learn account

Once the ‘Register’ link is clicked, the registration page will appear.

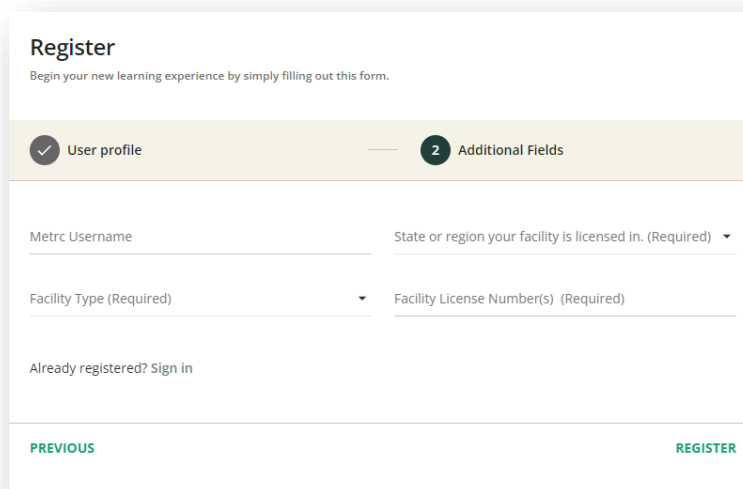
- From the registration page, complete all required information on the form. The password must include at least 9 characters. When complete, click 'Next' – see **Figure 4**.



The screenshot shows the 'Register' page with the heading 'Begin your new learning experience by simply filling out this form.' Below the heading is a progress bar with two steps: '1 User profile' (active) and '2 Additional Fields'. The form contains the following fields: 'Email (Required)', 'First Name (Required)', 'Last Name (Required)', 'Password (Required)' with an eye icon, 'Retype Password (Required)' with an eye icon, 'Language (Required)' with a dropdown arrow, and 'State or region your facility is licensed in' with a dropdown menu showing 'Alabama Industry Users'. At the bottom left is the text 'Already registered? Sign in' and at the bottom right is a green 'NEXT' button.

Figure 4: Registration – User profile

- On the next page, fill in all additional fields and click 'Register' – see **Figure 5**.



The screenshot shows the 'Register' page with the heading 'Begin your new learning experience by simply filling out this form.' Below the heading is a progress bar with two steps: '1 User profile' (completed with a checkmark) and '2 Additional Fields' (active). The form contains the following fields: 'Metrc Username', 'State or region your facility is licensed in. (Required)' with a dropdown arrow, 'Facility Type (Required)' with a dropdown arrow, and 'Facility License Number(s) (Required)'. At the bottom left is the text 'Already registered? Sign in', at the bottom left is a green 'PREVIOUS' button, and at the bottom right is a green 'REGISTER' button.

Figure 5: Registration – Additional fields

Upon approval of active Metrc Learn status, which can take up to 48 hours, an email invitation will be sent confirming registration.

Once the email invitation is received, navigate to the [Metrc Learn login page](#) to sign in and access training.

Metrc Learn mobile experience

Starting on March 31st, Metrc Learn will be available through the Go.Learn mobile application – Apple iOS and Android – to make training more accessible and convenient.

To take advantage of on-the-go access to Metrc training, simply scan the QR code below based on mobile device type, to download the free application – **see Figure 6**.

Login credentials will be the same as accessing through a web browser and a WiFi connection will be required.



Figure 6: Metrc Learn mobile application

Metric Learn future enhancements

Additional exciting enhancements are currently in development – see what's on the horizon:

- **Improved interactive learning experiences:** Refined course content and learning materials tailored to specific needs for a more engaging, informative, and relevant learning journey. With new features like interactive multimedia content, gamified quizzes, and collaborative learning activities, learning will become more immersive and fun to bring concepts to life and foster deeper understanding.
- **New modules:** Covering a more diverse range of topics and foundational principles of Metric, its software, features, and functionality in a user-centric manner.
- **Streamlined learning journeys:** Say goodbye to scattered resources and disjointed learning paths. The new LMS will provide a centralized hub where to access all learning materials, courses, and resources effortlessly.
- **Persona-based learning experience:** We understand that everyone learns differently, so the new LMS will offer personalized learning paths tailored and adaptive to individual needs and goals.
- **Real-time progress tracking:** Keep tabs on completed courses, achievements unlocked, and areas for improvement – all in real-time – so you can take control of your learning journey and stay motivated to reach new milestones.
- **On-demand mobile experience:** To further enhance this new feature, 'Offline Mode' functionality will allow users the ability to access content when no WiFi connection is available.

To share feedback with our team, you can reach out directly to our Training and Learning Experience team at learn@metric.com.

For general Metric system-related inquiries, please submit a case with Metric Support through the support portal at support.metric.com.

We're here to help you make the most of your learning experience and remain dedicated to supporting you every step of the way. Thank you for your continued partnership and for choosing Metric Learn to continue on our journey of collective growth.

Auto-Finalization of Active Sales Receipts

Previously, retailer and/or dispensary Administrators were required to finalize sales receipts in Metrc manually. **Figure 1** below demonstrates an example in which a sales receipt is ready for finalization, which is identified in the ‘Finalized’ column.

The screenshot shows the Metrc interface for Sales Receipts. The 'Sales' menu is selected in the top navigation bar. The 'Active' tab is selected, and the 'Finalize' button is visible. The grid contains two rows of data:

Receipt	Sales	Customer Type	Patient	Packages	Total	Recorded	Finalized
0000000981	01/11/2023 04:35 pm	Consumer		1	\$1.00	01/11/2023 06:36 pm	No
0000000976	11/07/2022 12:26 pm	Consumer		1	\$85.00	11/07/2022 12:27 pm	No

Figure 1: Previous Sales Receipts Grid

Effective 12/27/2023, new auto-finalization functionality will automate active sales receipt finalization for any sales receipt that has been reported and no edits have occurred within the last seven days.

To locate all applicable auto-finalized sales receipts, the following steps should be followed:

1. Go to the Sales area dropdown on the navigational toolbar
2. Select Receipts option
3. Click on the ‘Inactive’ tab

The sales receipts within the ‘Finalized’ column display “Yes” now that they are finalized and inactive. In addition, the Sales Receipt grid will identify the receipt number, time/date of sale, customer type, patient number, number of packages that were sold from, sales total, and date/time the sale was recorded in Metrc – **see Figure 2**.

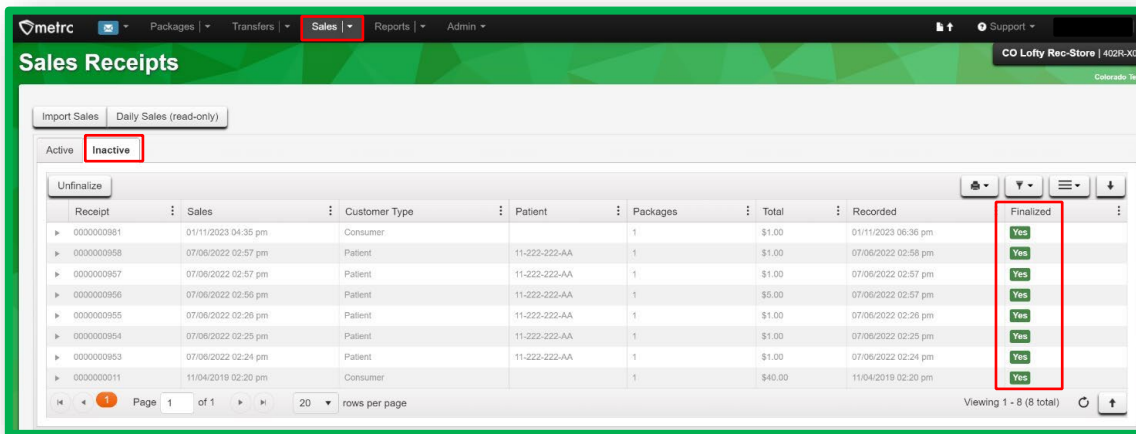


Figure 2: Auto-finalized Sales Receipts in the Inactive Sales Receipts tab

If a situation arises where a finalized inactive sales receipt needs to be unfinalized, the following steps should be followed to unfinalize – see Figure 3.

1. Go to the Sales area dropdown on the navigational toolbar
2. Select Receipts option
3. Click on the 'Inactive' tab
4. Select the respective receipt(s) that need to be unfinalized
5. Click the 'Unfinalize' button

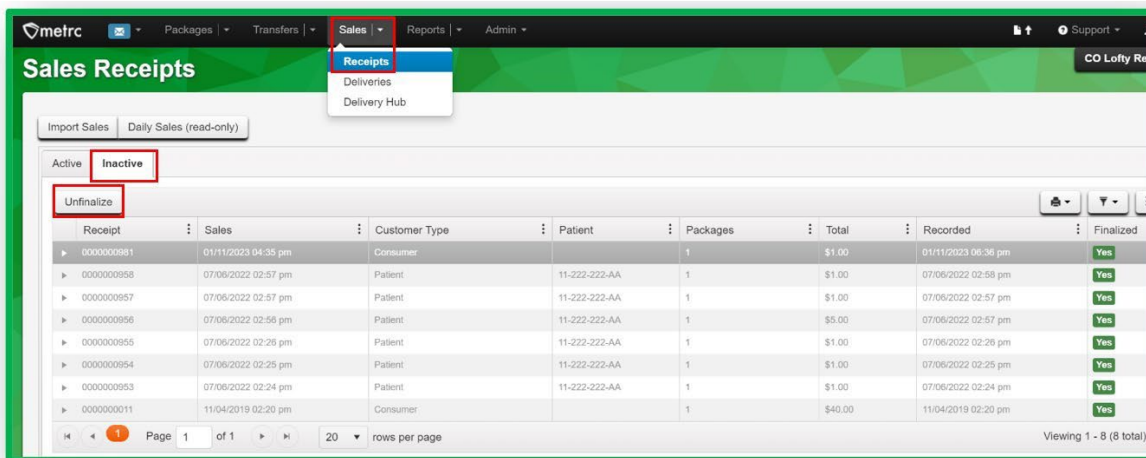


Figure 3: Unfinalizing an Inactive Finalized Sales Receipt

After an inactive sales receipt is unfinalized, the respective sales receipt will move back to the 'Active' tab as demonstrated in **Figure 4**.

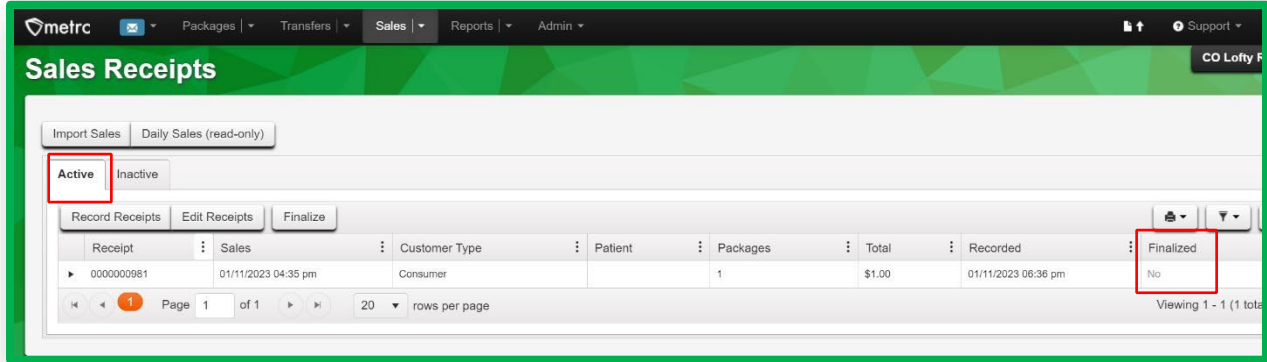


Figure 4: Unfinalizing Receipts – Active tab confirmation

Auto-Finishing of Active Zero Quantity Packages

Auto-finishing active packages is similar to the process of auto-finalizing active sales receipts.

Effective 12/27/2023, new functionality will automate finishing of active zero quantity packages that have not had any updates to the package within the last thirty days.

To locate all applicable auto-finished active zero quantity packages, the following steps should be followed:

1. Go to the Packages area dropdown on the navigational toolbar and select the Packages option
2. Click on the 'Active' tab
3. Scroll to the 'Quantity' column to view the package shows as zero (To see all packages showing zero, select the word "Quantity" at the top of the Quantity column in the active Packages grid.)

Figure 5 below demonstrates an example in which a package has zero inventory but is still listed as an active package in Metrc. The new functionality will auto-finish these packages and remove the manual work of doing so for each package.

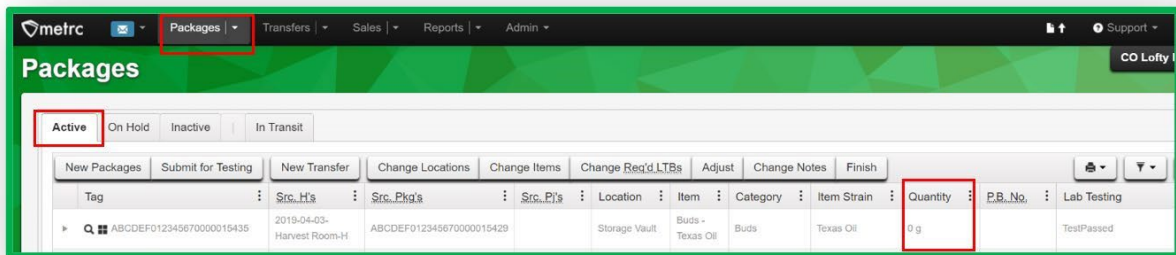


Figure 5: Active Packages Grid

With the deployment of the auto-finishing functionality, all applicable finished packages can be located in the Packages grid > Inactive tab where packages within the 'Finished' column display "Yes" now that they are finished and inactive – see **Figure 6** below.

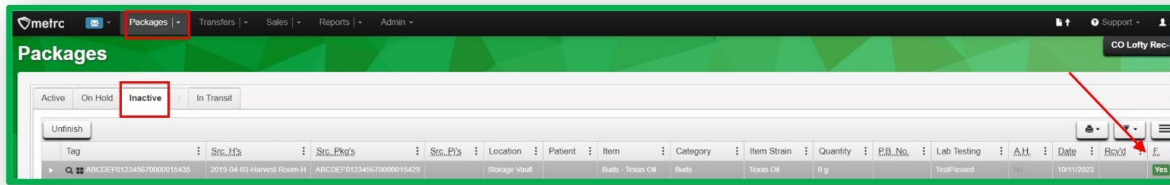


Figure 6: Inactive Packages Tab

If a situation arises where a finished inactive zero quantity package needs to be unfinished, the following steps should be followed to unfinalize:

1. Go to the Packages area dropdown on the navigational toolbar and select the Packages option
2. Click on the 'Inactive' tab
3. Select the respective package(s) that need to be unfinalized
4. Click the 'Unfinish' button

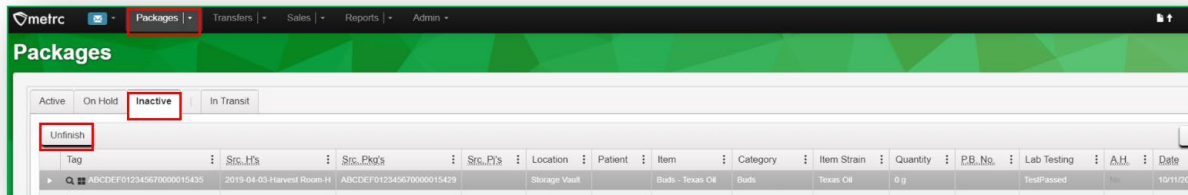


Figure 7: Unfinishing Packages

After a package is unfinished, the respective package(s) will move back to the 'Active' tab – see **Figure 8**.

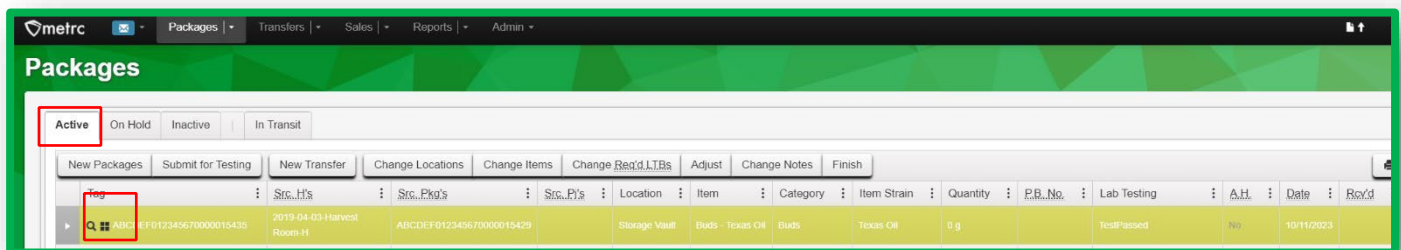


Figure 8: Unfinishing Packages - Active tab confirmation

Update to View permissions

Metrc appreciates the collaboration with both the state and its licensees to continue making improvements to the system that benefit all users. Events held in each state, known as User Groups, provide us with invaluable feedback that can at times result in system updates. One such update that resulted from a state User Group is the addition of View permissions to all three Transfer Menu options as well as the Employees grid found in the Admin area.

To set these permissions, go to the Admin area dropdown on the navigational toolbar and select the Employees option – **see Figure 1.**

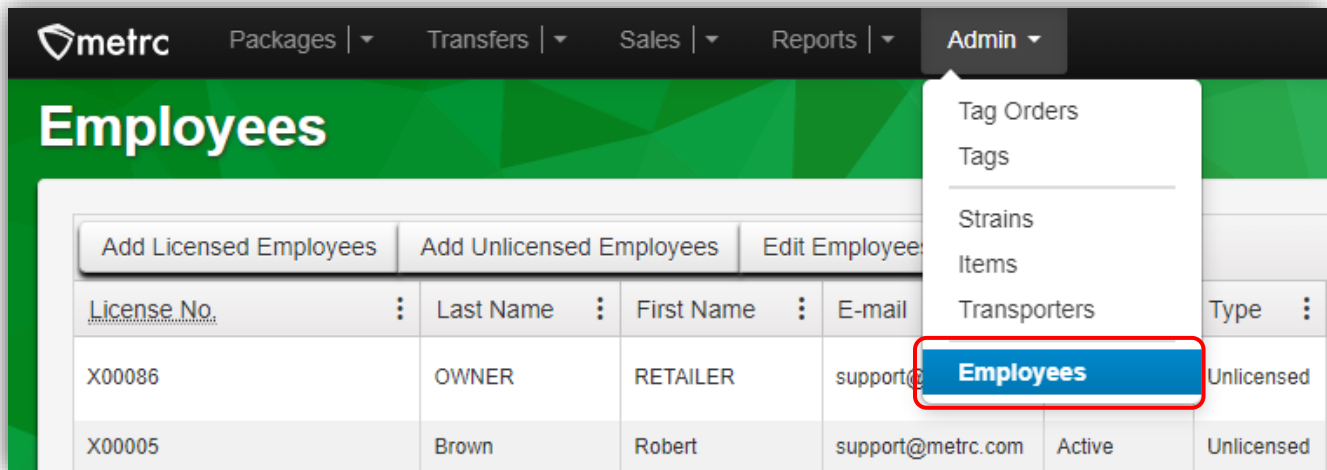


Figure 1: Employees option in Admin area dropdown

Once on the Employees grid, highlight the employee you would like to edit permissions of and select the Edit Employees button to access the Edit Employees action window – **see Figure 2.**

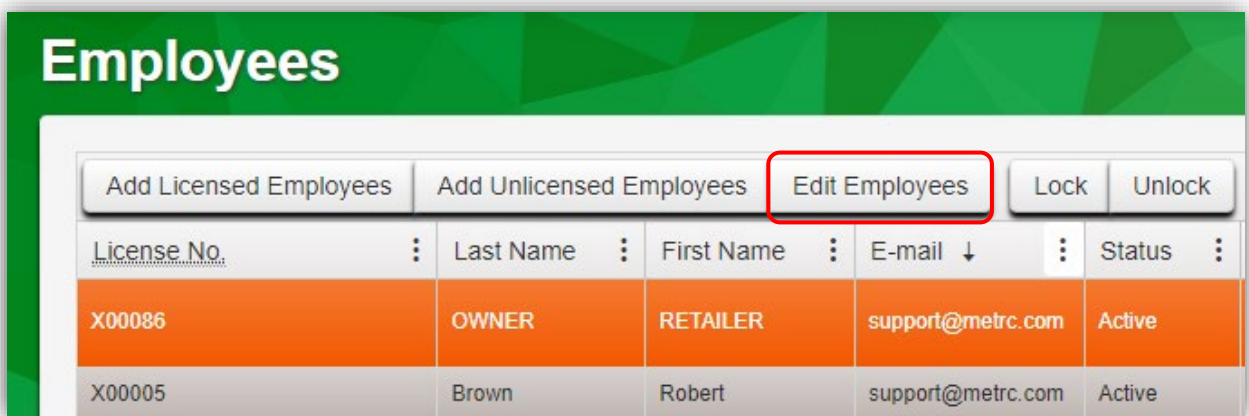


Figure 2: Edit Employees button

Within the Edit Employees action window, users now have the option to grant View only access to the Transfers Menu and Admin Menu – Employees. Users can select either View or Manage for these permissions, but not both. Selecting Manage will uncheck the View permission because Manage grants both manage and view permissions – **see Figure 3.**

Permissions	View	Manage
Packages Page		
Grids (req'd)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Inventory	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Create/Submit/Disc.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Notes	<input type="checkbox"/>	<input type="checkbox"/>
Transfers Menu		
Licensed & External	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Templates	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Hub	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales Menu		
Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales Delivery	<input type="checkbox"/>	<input type="checkbox"/>
Adverse Responses	<input type="checkbox"/>	<input type="checkbox"/>
Patients Menu		
Trips Menu		
All	<input type="checkbox"/>	<input type="checkbox"/>
Financials Menu		
All	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reports Menu		
All	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Admin Menu		
Tag Orders	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tags	<input type="checkbox"/>	<input type="checkbox"/>
Strains	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Transporters	<input type="checkbox"/>	<input type="checkbox"/>
Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Search Menu		
Search Facility	<input type="checkbox"/>	<input type="checkbox"/>
Caregiver Status Lookup	<input type="checkbox"/>	<input type="checkbox"/>

Figure 3: New View permissions for Transfers and Admin Menu

Metrc resources

If you have any questions, or need additional support, the following resources are available:

Contact Metrc Support by using the new full-service system – Service Cloud – by navigating to [Support.Metrc.com](https://support.metrc.com), or from the Metrc System, click Support and navigate to support.metrc.com and it will redirect to the portal.

Please note: If accessing the portal for the first time, a username (which is established when logging in), the respective state and “Facility license number”, and a valid email to set a password are required. For additional information, please review the [step-by-step guide](#) or a [video demo](#).

Metrc Learn: 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 log in, visit [Metrc Learn](#) and enter your login credentials, or to access, register by visiting the [Metrc Learn Registration](#).

Access additional resources: In the Metrc system, click on the Support area dropdown on the navigational toolbar and select the appropriate resource, including educational guides, manual, and more.

Thank you for your continued partnership.