

Bulletin Number: OK_IB_0031 Transfer and Employee updates	Distribution Date: 03/08/2024	Effective Date: 03/13/2024
Contact Point: Metrc Support	Subject: Updates to Permissions	
Reason: To grant employees permission to View Transfer and Employees grids		

Greetings,

Metrc is pleased to provide information on the latest system enhancements that will be available on 03/13/2024, including:

- 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.

Additional 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 and select the Employees option – **see Figure 1.**

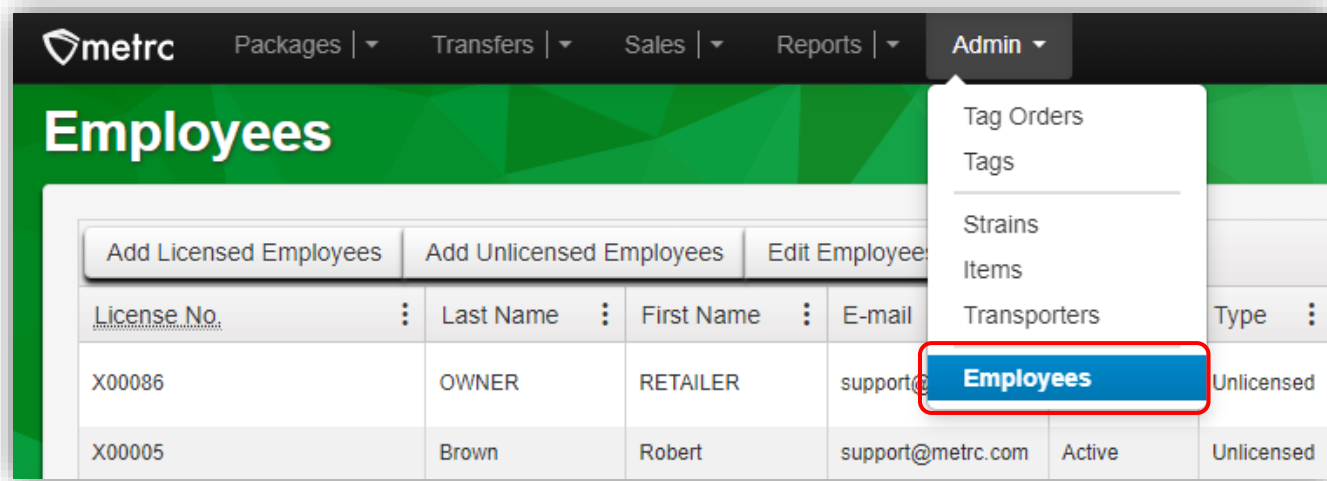


Figure 1: Employees option in Admin area dropdown

Next, 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.**

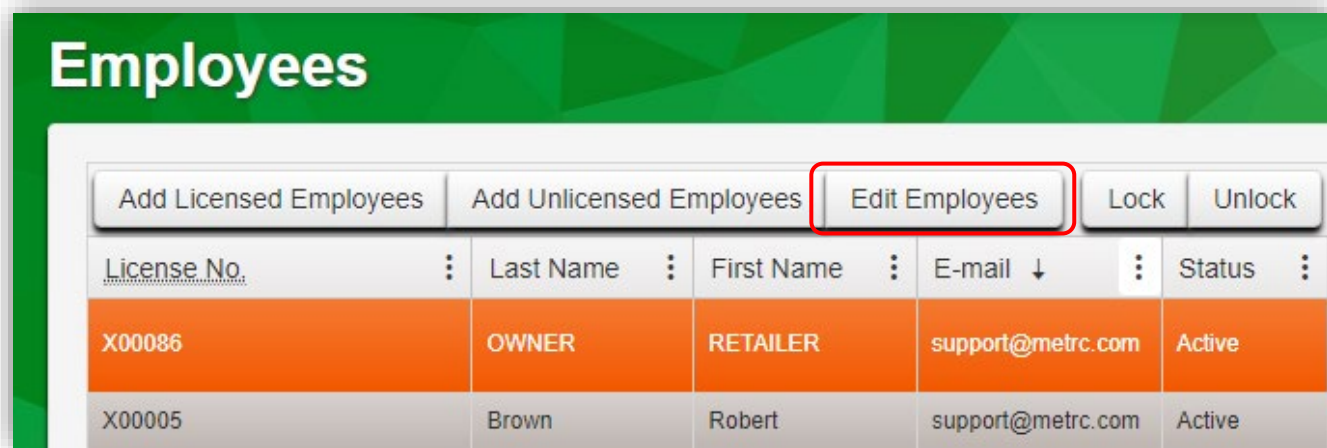


Figure 2: Edit Employees button

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.**

Employee # 1

Employee

RETAILER OWNER

Employee Lic. Number

X00086

☒ Enable online access to this Facility

E-mail

support@metrc.com

Home

Packages

Employment

☐ Owner at this Facility
☒ Manager at this Facility
☐ Checks/Verifies customer identification
☐ Compliance Officer or Security
☐ Data entry/Records inventory in Metrc
☐ Directly handles marijuana items
☐ None of the above

Permissions

Packages Page

Grids (req'd)

☒ View

Inventory

☒ Manage

Create/Submit/Discontinue

☒ Manage

Notes

☐ Manage

Transfers Menu

Licensed & External

☒ View ☐ Manage

Templates

☒ View ☐ Manage

Hub

☒ View ☐ Manage

Sales Menu

Sales

☒ Manage

Sales Delivery

☐ Manage

Adverse Responses

☐ Manage

Patients Menu

Trips Menu

All

☐ View ☐ Manage

Financials Menu

All

☒ Manage

Reports Menu

All

☒ View

Admin Menu

Tag Orders

☒ Manage

Tags

☐ Manage

Strains

☒ Manage

Items

☒ Manage

Transporters

☐ Manage

Employees

☒ View ☐ Manage

Search Menu

Search Facility

☐ Manage

Caregiver Status Lookup

☐ View

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 is 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 login, 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 dropdown in the top-right navigation pane and select the appropriate resource, including educational guides, manual, and more.

Thank you for your continued partnership.