

Bulletin Number: CO_IB_4.26.24_Default license, special characters, and permissions	Distribution Date: 04/29/2024	Effective Date: Ongoing				
Contact Point: Metrc Support	upport <b>Subject:</b> Default license, special characters, and permissions					
Reason: Provide insight into system updates and new permissions						

#### Greetings,

Metrc is pleased to provide information on the latest system enhancements and updates, including:

- Allowed Special Characters
- Setting Default Licenses
- Additional View Permissions

Please read on for more information regarding this new functionality.



## **Special Characters**

Metrc currently supports several string fields for users to input information such as Strain Names, Item Names, Locations, Harvest Batches, Plant Batches, Production Batches, Drivers, Vehicles, and Notes. The table below outlines accepted characters the Metrc system will receive for string fields – **see Figure 1**.

Characters	Accepted
Lower Case Letters	a-z
Upper Case Letters	A-Z
Numbers	0-9
Special	'. <b>?!@#\$%^&amp;*()[]</b> /\ >+`~:,

Figure 1: Accepted Characters in Metrc

If a character is submitted that is not deemed acceptable, the Metrc system will return an error message. The error message states, "Invalid character or sequence in parameter {name}." The {name} will represent the name of the field where the invalid character or sequence was attempted to be used.



# **Setting Default Licenses**

Previously, users who have access to multiple Metrc facilities were automatically directed or defaulted to the licensed facility that the user was first credentialed into when logging into the system. Below is an example of accessible Metrc facilities within a user's license dropdown located at the top right of the grid – **see Figure 2**.

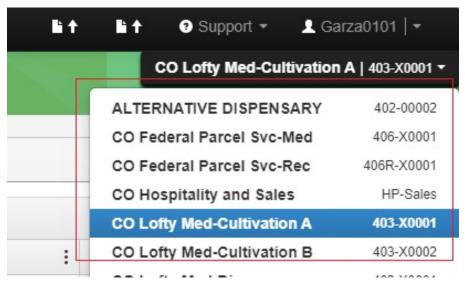


Figure 2: Available facilities in License drop-down

Now, new functionality offers the ability to change the default license setting through a user's profile. To update this setting, please take the following steps:

1. Click on the drop-down arrow to the right of the username on the navigational toolbar to access the User Profile – **see Figure 3.** 

# 

t	<b>i</b> †	? Support 👻	👤 Garza0101 💌
		CO Lofty Med-	User Profile
		N.	API Keys Login History
			Log out
		<b>≜</b> •][₹•]	
St .			

Figure 3: Access the User Profile

Once on the User Profile page:

- 2. Select the Default Facility drop-down at the bottom of the screen.
- 3. Select the preferred facility to use as the default see Figure 4.

Villeirc 🔤 · 🖻	tants [ * Packages [ * Transiers ] * Sales [ * Pinanciais ] *	· Reports [ · Admin ·			T Support
User Profile					
	Co	ontact Info.	Security Info.		
	Full Name	Stephanie Garza Userna	me Garza0101		
	E-mail	Passwo	d		
	Phone Number	ex. +1-123-456-7890 Confirm Passwor	d		
			Password and Confirm     Password must match!		
		A	ccount Recovery		
Security Question					
Security Answer					
	View Security Answer				
		l	lser Preferences		
Save grid configurations <sup>[2]</sup> remotely					
Default Facility <sup>(2)</sup>	- First Available -			~	
	- First Available -				
	402-00002 - ALTERNATIVE DISPENSARY 406-X0001 - CO Federal Parcel Svc-Med				
	406R-X0001 - CO Federal Parcel Svc-Rec HP-Sales - CO Hospitality and Sales				
	403-X0001 - CO Lofty Med-Cultivation A 403-X0002 - CO Lofty Med-Cultivation B				
	402-X0001 - CO Loffy Med-Dispensary 403R-X0001 - CO Loffy Rec-Cultivation				
	402R-X0001 - CO Loffy Rec-Store 403-X0003 - CO Mishmash Med-Cultivation				
	404-X0001 - CO Mishmash Med-MIP 403R-X0002 - CO Mishmash Rec-Cultivation				
	404R-X0001 - CO Mishmash Rec-MIP 802R-00001 - CO Off Premises Storage 2				
	405-X0001 - CO Perceptive Labs-Med 405R-X0001 - CO Perceptive Labs-Rec				
	802R-00000 - CO Retail Off Premises Storage			$Z_{\rm eff}$	

Figure 4: Default Facility drop-down



1. Once the preferred default facility is selected, click the green Save Profile button at the bottom of the User Profile page – see Figure 5.

	Co	ntact Info. Se	Security Info.
	Full Name	Stephanie Garza Usernam	name Garza0101
	E-mail	Password	ord
	Phone Number	Ex. +1-123-456-7890 Confirm Password	ord
			Password and Confirm     Password must match!
		Ac	Account Recovery
Security Question			
Security Answer			
C	View Security Answer		
		Us	User Preferences
Save grid configurations	3		
Default Facility	403-X0001 - CO Lofty Med-Cultivation A		~
L			
		Save Prolife Undo Changes	
	V		

Figure 5: Save Default Facility

## **View Permissions**

Based on the collaboration between and feedback received from industry users, state agency representatives, and Metrc during the quarterly User Groups, the addition of View permissions to all three Transfer Menu options and the Employees grid found in the Admin area is now available.

To set up these permissions, first navigate to the Admin area dropdown on the navigational toolbar and select the Employees option – **see Figure 6**.

$\Diamond$	metrc Packages   -	Transfers   -	Sales   - Rep	orts   🗸	Admin 🗸	
E	mployees				Tag Orders Tags	
	Add Licensed Employees	Add Unlicensed E	mployees Edit	Employee:	Strains Items	
	License No.	Last Name	First Name	E-mail	Transporters	туре :
	X00086	OWNER	RETAILER	support@	Employees	Unlicensed
	X00005	Brown	Robert	support@r	metrc.com Active	Unlicensed

Figure 6: Employees option in Admin area dropdown

Metrc LLC For additional support, please visit <u>Support.Metrc.com</u>



From the Employees grid, highlight the employee required edited permissions and select the Edit Employees button to access the Edit Employees action window – **see Figure 7.** 

mployees			1				
Add Licensed Employees	Add Unlicensed	Employees	Edit	Employees	Lock	Unlo	ck
License No.	Last Name	First Nam	e :	E-mail ↓	:	Status	
X00086	OWNER	RETAILER		support@met	rc.com	Active	
X00005	Brown	Robert		support@met	rc.com	Active	

#### Figure 7: Edit Employees button

Within the Edit Employees action window, the option to grant View only access to the Transfers Menu and Admin Menu – Employees is now available. Users can select either View or Manage for these permissions, but not both. Selecting Manage grants both manage and view permissions – **see Figure 8**.



Edit Employees

Employee #	<i>‡</i> 1			
Employee	RETAILER OWNER 🗸	Permissions	Packages Page	
Employee Lic.	X00086		Grids (reg'd)	View
Number			Inventory	Manage
	Enchle online eccess to this Equility		Create/Submit/Disc. Notes	Manage Manage
	Enable online access to this Facility			
E-mail	support@metrc.com		Transfers Menu	
Home	Packages 🗸		Licensed & External	View 🗌 Manage
Home	T deltages		Templates Hub	<ul> <li>✓ View □ Manage</li> <li>✓ View □ Manage</li> </ul>
Employment	Owner at this Facility	(	Hub	🗹 View 🗌 Manage
	Manager at this Facility		Sales Menu	
	Checks/Verifies customer identification		Sales	Manage
	Compliance Officer or Security		Sales Delivery	Manage
	Data entry/Records inventory in Metrc		Adverse Responses	Manage
	Directly handles marijuana items		Patients Menu	
	None of the above		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 8: 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 <u>Support.Metrc.com</u>, 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.

**Metrc Learn:** Metrc Learn has been redesigned to provide users with interactive, educational information on system functionality to expand skillsets and drive workflow efficiencies.

Accessing the new Metrc Learn LMS is 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 <u>state's partner page</u> 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.

**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, manuals, and more.

Thank you for your continued partnership.