

Bulletin Number: DC_IB_0062	Distribution Date: UPDATED 4/6/2024	Effective Date: Ongoing
Contact Point: Metrc Support	Subject: Updated Data Import (CSV Queuing) and Updates to Permissions	
Reason: The existing Data Import feature will be replaced by the Updated Data Import feature (CSV Queuing). Granting employees permission to View Transfer and Employees grids.		

Greetings,

In November 2023, the Updated Data Import (CSV Queue) functionality was released to create better workflow efficiencies through expanding CSV data import capabilities and reduce time spent waiting for CSV uploads to occur before completing other actions in the Metrc system.

Based on market requirements, the Updated Data Import (CSV Queue) functionality has offered:

- Data import expansion to 10,000 rows per upload instead of 500/1000, depending on market.
- Notifications on upload status.
- Ability to add multiple files to the queue at the same time and log out or take other actions while uploading.
- Error reporting on uploaded files with a return file showing exact lines that failed.
- Acceptance of rows that are correct instead of throwing an error and preventing the entire upload.

To better meet the needs of the industry and to deliver a more efficient experience with the Metrc system, legacy functionality will no longer be supported starting on April 30th, 2024 and the Updated Data Import (CSV Queue) functionality will need to be used.

Please read on to learn how the Updated Data Import (CSV Queue) functionality works in preparation for this transition.

Metrc is also pleased to provide information on the latest system enhancements that are now available as of 03/12/2024, 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 functionality.

Enhancements to Updated Data Import

Licensed users will have a new CSV import process available that allows for larger CSV files to be uploaded. This new 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. 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.

Until April 30th, users will have two data import options available from the navigational toolbar dropdown – **see Figure 1**. If “Data Import” is selected, the page that opens will show up as “Data Import (legacy)”.

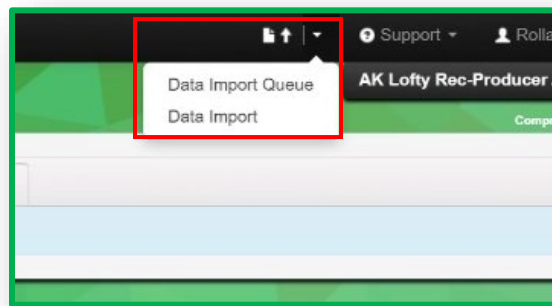


Figure 1: Dropdown to access Data Import options

Previously named Updated Data Import, the *Data Import Queue* page is designed to improve the user experience and allow users to track the status of their import requests using the three tabs shown in **Figure 2** below:

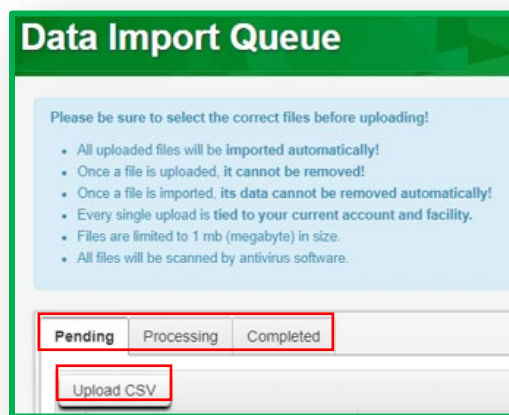


Figure 2: Data Import Queue page

Pending tab: CSV imports are initiated from the *Pending* tab by selecting the *Upload CSV* tab highlighted in **Figure 2** above.

The *Upload CSV* action window, as shown in **Figure 3** below, allows the user to select the applicable *File Upload Type* from a drop-down list and either use the *Select Files* button to browse their device to choose the CSV file to be imported or drag and drop the CSV file to be imported into the *Select Files* area of the modal.

Figure 3 below demonstrates further. Notice that the CSV columns region of the action window displays the required sequence and data points within the CSV upload.

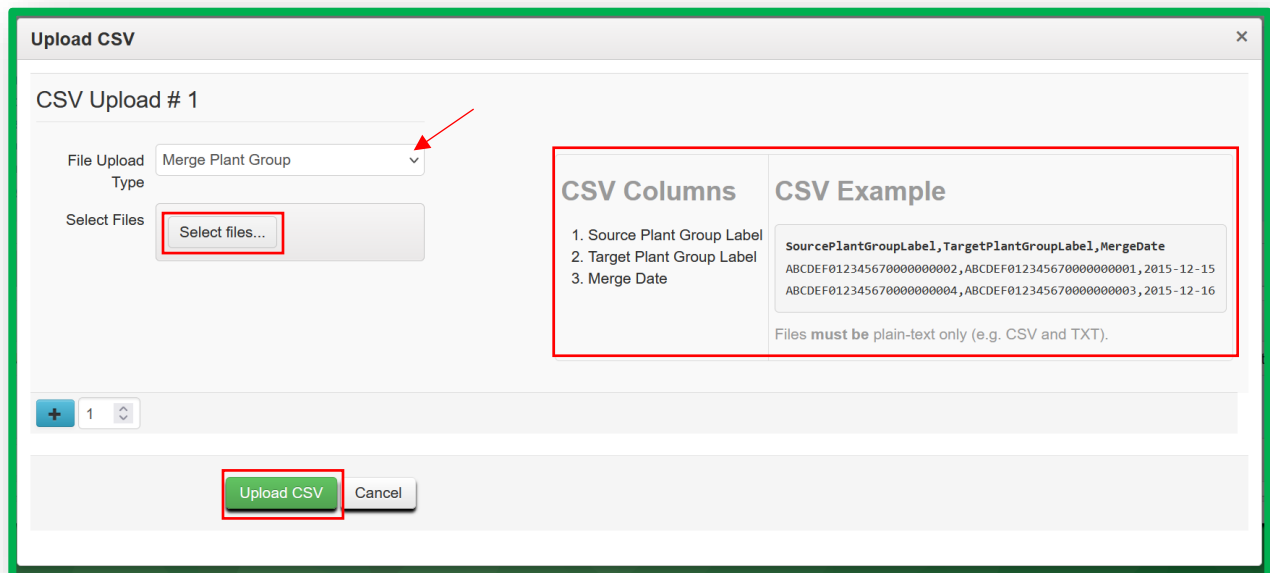


Figure 3: Upload CSV action window

Once the *Upload CSV* button is selected, the import request displays as a row on the *Pending* grid until processing begins. The *Pending* tab includes a *Position* column which indicates where the file stands in the processing queue. In **Figure 4** below the *Position* value indicates the upload is number 1 in the queue. An *Estimated Completion* column has been added to the *Pending* grid as well.

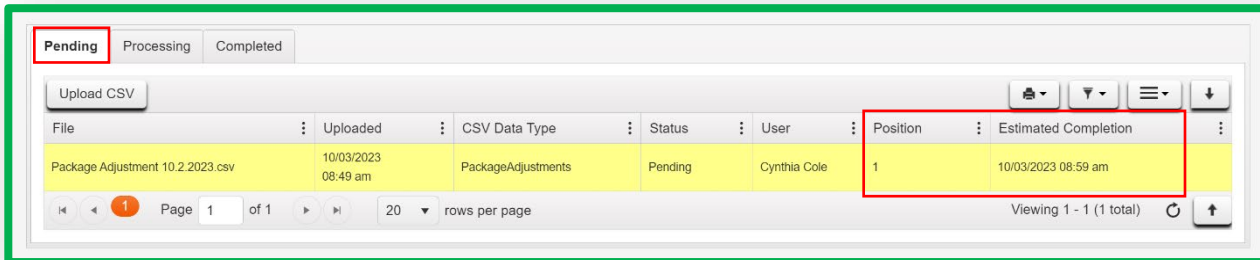


Figure 4: Pending button

Processing tab: While being processed, the import request is displayed on the *Processing* tab.

An *Estimated Completion* column has been added to the *Processing* grid as shown in **Figure 5**. Additionally, an email is generated to the user as soon as processing has begun. The email includes an updated estimated completion time.

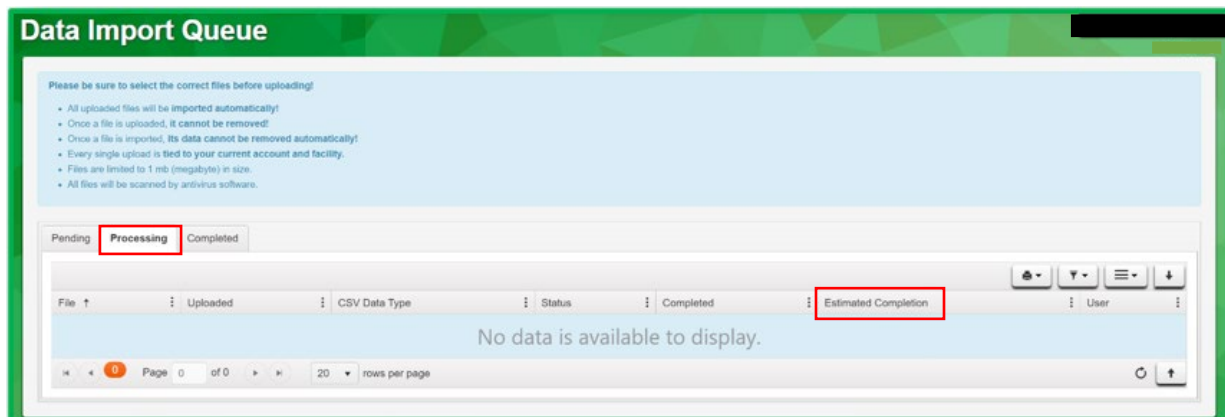


Figure 5: Processing button

Completed tab: When processing of an import request is completed, the request displays on the *Completed* tab, along with the *Total Rows Processed*, *Total Rows Failed*, and an overall status indicating either *Successfully Imported* or *Error – Not Imported*.

Metrc processes any rows it can rather than rejecting the entire file due to errors on a subset of the rows in the file. Metrc creates a CSV file containing just the failed rows. The user can download the CSV file using the download tab highlighted in **Figure 6** and then refer to the error messages in the drill down to resolve the issues prior to submitting a new request to process the corrected rows.

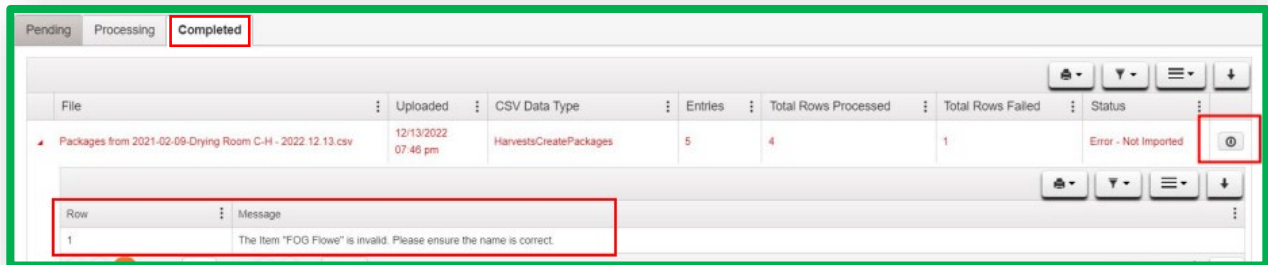


Figure 6: CSV File Downloads and Error Messaging

The only exception to the import process occurs at the Laboratory/Testing level. For Lab Testing, all data files must be successfully imported in full. Should the upload incur errors, the entire file will need to be re-submitted as partial file acceptance will not occur. **Figure 7** demonstrates a successful upload in full, without errors. Notice that the history drill down states there were no errors and the *Total Rows Failed* and *Status* reflect a successful upload.

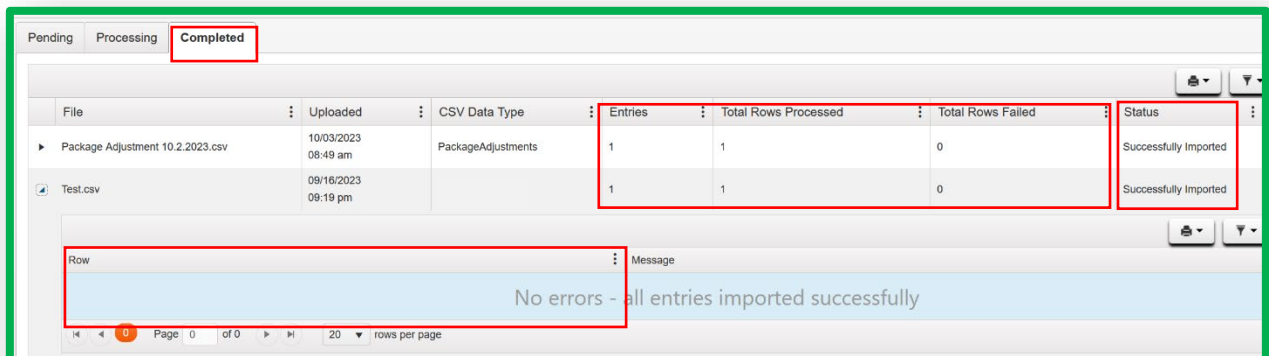


Figure 7: Completed Uploads Without Errors

For additional visibility and clarity into the data upload process, a no reply email from noreply@metrc.com will be sent to the user's email address that will confirm the data import status. This will look much like **Figure 8** below.

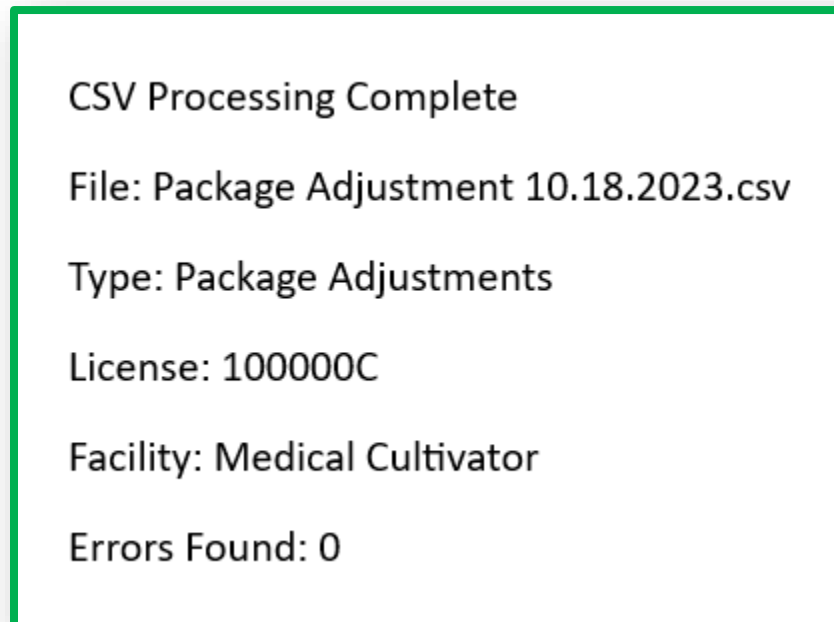


Figure 8: E-mail Confirmation example

Additional View permissions

Metrc appreciates the collaboration with both the district and its licensees to continue making improvements to the system that benefit all users. Events held in each jurisdiction, 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.**

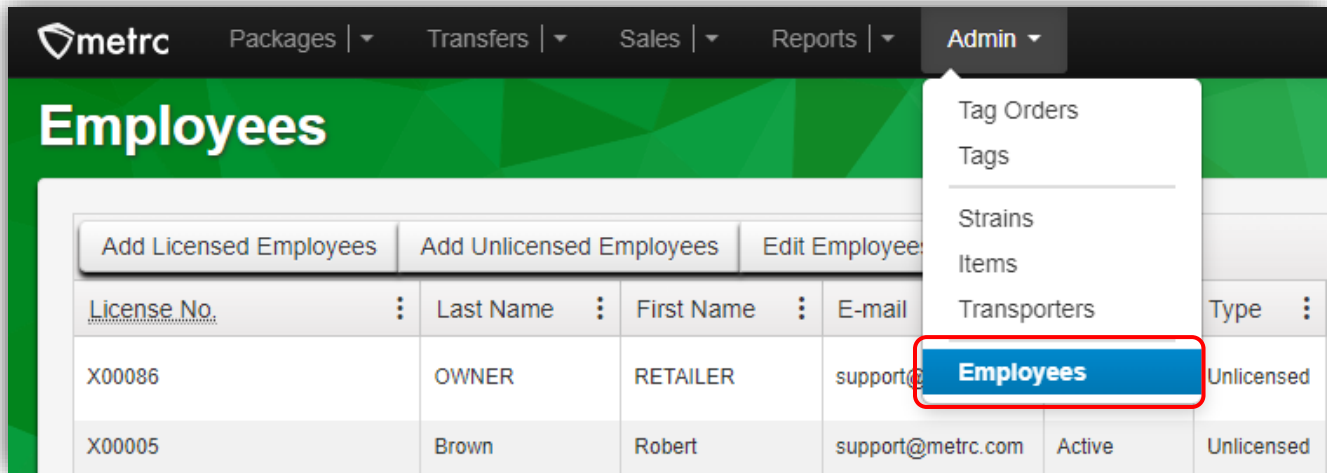


Figure 1: Employees option in Admin area dropdown

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.**

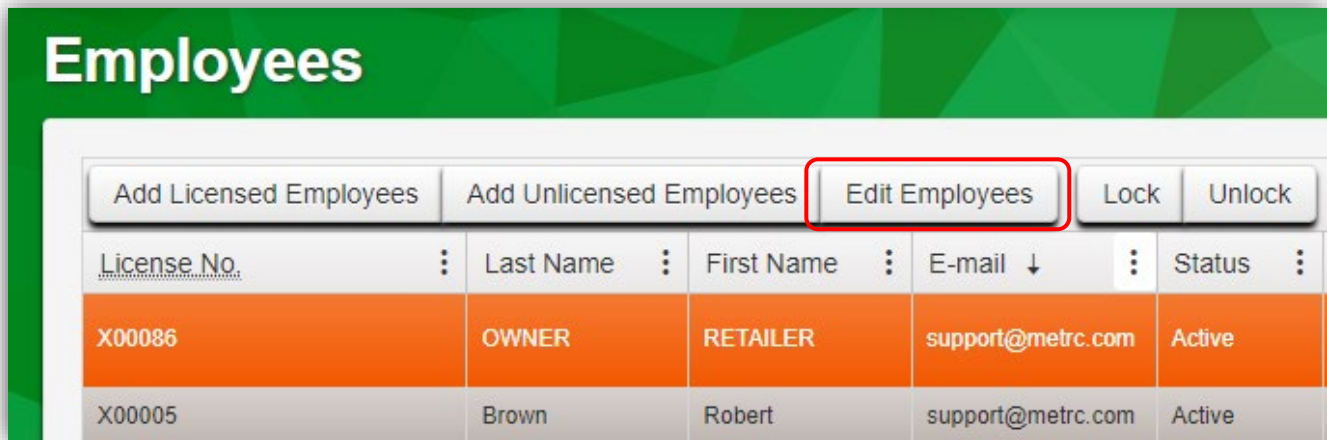


Figure 2: Edit Employees button

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.**

Edit Employees

Employee # 1

Employee: RETAILER OWNER

Employee Lic. Number: X00086

Enable online access to this Facility

E-mail: support@metric.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 Metric, Directly handles marijuana items, None of the above

Permissions

Packages Page

- Grids (req'd) View
- Inventory Manage
- Create/Submit/Disc. Notes 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 jurisdiction 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 top-right navigation pane and select the appropriate resource, including educational guides, manual, and more.

Thank you for your continued partnership.