

<b>Bulletin Number:</b> ME_IB_0045	<b>Distribution Date:</b> 05/06/2024	<b>Effective Date:</b> 03/26/2024
<b>Contact Point:</b> Metric Support	<b>Subject:</b> Updates to Permissions & Reports	
<b>Reason:</b> To grant employees permission to View Transfer and Employees grids		

Greetings,

Metric is pleased to provide information on the latest system enhancements that were available on 03/26/2024 including:

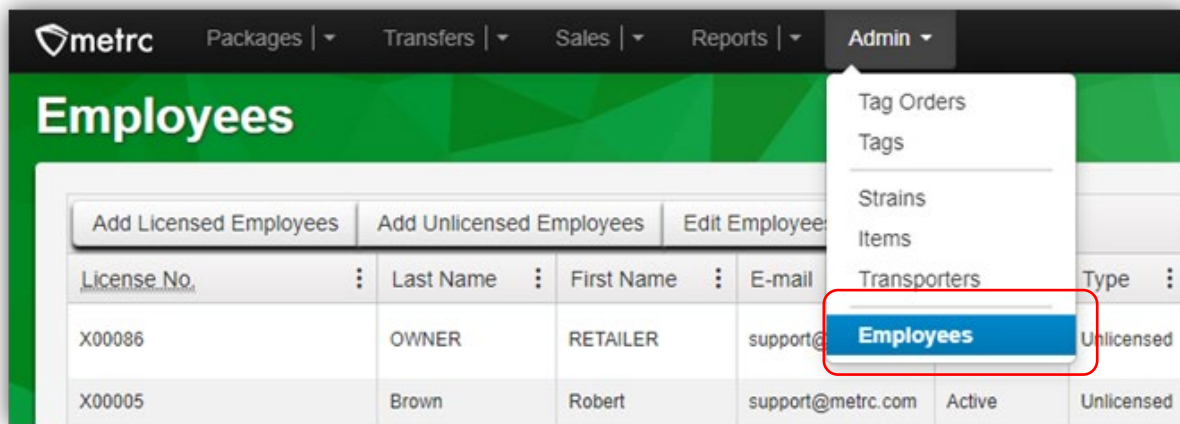
- The addition of View permissions to the following areas of the Metric system
  - Sales Menu
    - Sales
    - Receipts
    - Sales Delivery

Please read on for more information regarding this new functionality.

## Additional View permissions

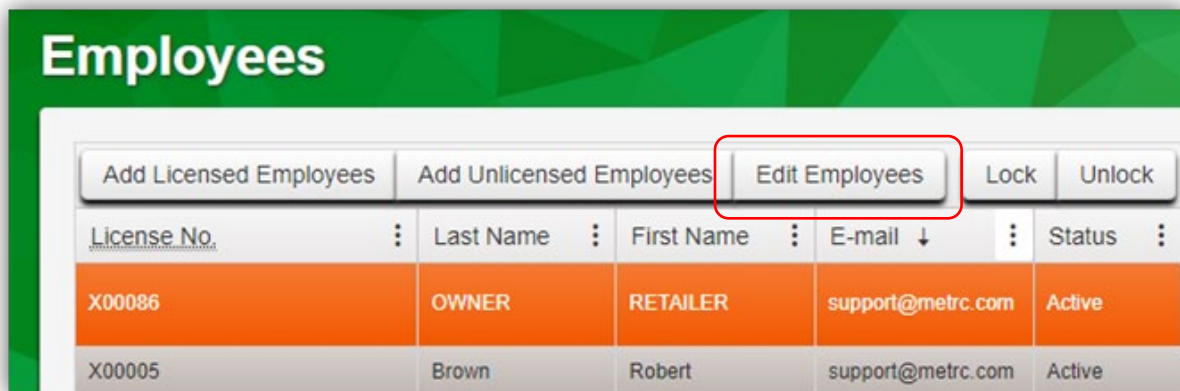
Metrc appreciates the collaboration with both the state and its licensees to continue making improvements to the system that benefit all users. Events held in each state, known as User Groups, provide us with invaluable feedback that can at times result in system updates. One such update that resulted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

The screenshot shows the 'Edit Employees' interface. On the left, there are fields for Employee selection, License Number, E-mail, Home, and Employment roles. On the right, a 'Permissions' table lists various menu items with checkboxes for 'View' and 'Manage'. The 'Sales Menu' section is highlighted with a red box, showing 'Sales' and 'Sales Delivery' both with 'View' checked and 'Manage' unchecked. Other sections include Packages Page, Transfers Menu, Trips Menu, Financials Menu, Reports Menu, and Admin Menu.

Permissions	View	Manage
<b>Packages Page</b>		
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 checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Transfers Menu</b>		
Licensed & External	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Templates	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Sales Menu</b>		
Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales Delivery	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Trips Menu</b>		
All	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Financials Menu</b>		
All	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Invoices	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Reports Menu</b>		
All	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Admin Menu</b>		
Tag Orders	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tags	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Locations	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Strains	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Transporters	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Figure 3: New View permissions for Sales 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 the Support area dropdown 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.