

<b>Bulletin Number:</b> OH_IB_72	<b>Distribution Date:</b> 06/23/2025	<b>Effective Date:</b> 06/24/2025
<b>Contact Point:</b> Metrc Support	<b>Subject:</b> New features: Employee Roles, Sublocations, and Create Items/Strains update	
<b>Reason:</b> To provide licensed users updates on the latest Metrc system feature enhancements.		

Greetings,

Metrc is pleased to announce that the following (3) new feature enhancements are now available.

- **Employee Roles:** Employee Roles introduces optional role-specific controls tailored to the unique needs of all facility workflows, ensuring operational efficiency and compliance.
- **Sublocations:** A new, optional Sublocations feature provides more granular control and organization of physical or virtual spaces.
- **Create Items/Strains from same screen:** New functionality that offers users the ability to create new Strains and Items from the same action window when a package is being created.

Please read on for more information related to each of these new features.

## NEW FEATURE 1

### Employee Roles

Designed to align user permissions with real-world responsibilities across your cannabis operation, Industry Admins, or those with the proper permissions, will now have the ability to create, assign, and manage employee roles with precise permissions so users access only the features and data necessary for their responsibilities.

**Note:** A user must have the “Manage” permission for Employees under the Admin Menu section to grant other employees the ability to “View” or “Manage” the new Employee Roles.

To learn more, check out the “What’s New” section in Metrc Expert and read on for more information.

### Creating and Managing Employee Roles

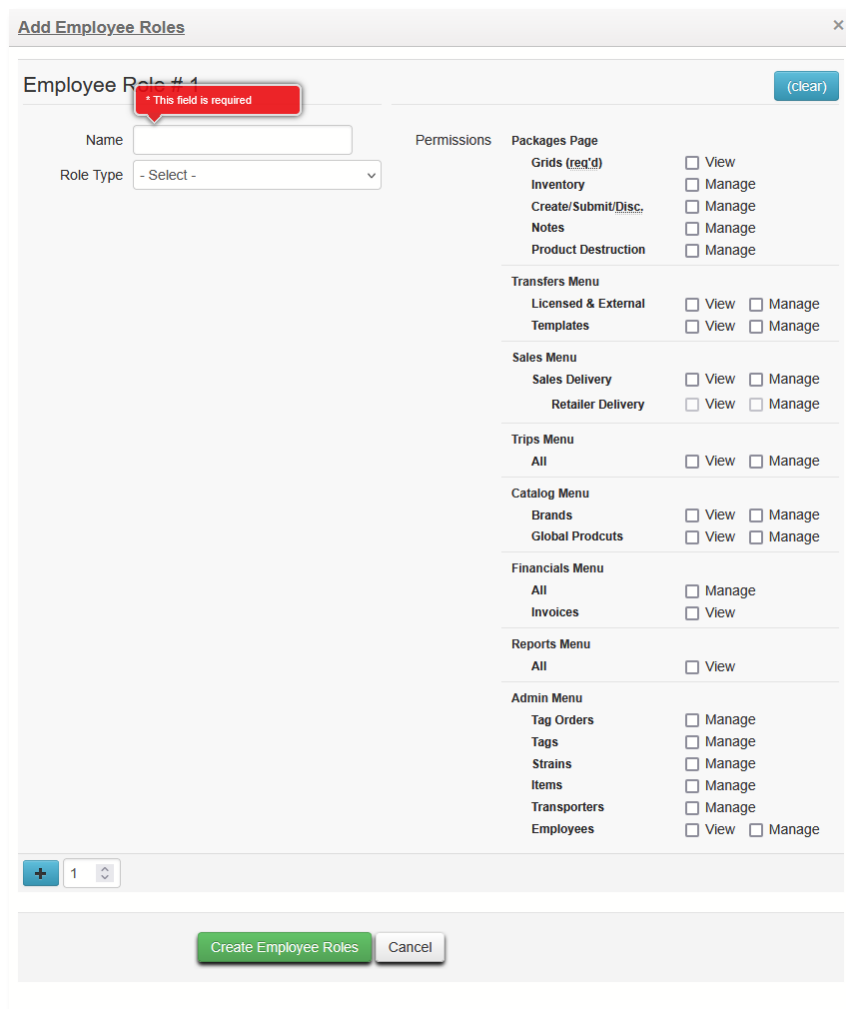
Only employees granted the “Manage” Employee Role Types permission will have the ability to create Employee Roles and associate them to specific employees or a group of employees. To create and manage Employee Roles:

Navigate to the Admin drop-down on the navigational toolbar and select the Employee Roles option to open the new Employee Roles grid. Then from the Employee Roles grid, click on the Active tab.

#### Adding Employee Roles

- Click the Add Employee Roles button to open the Add Employee Roles action window.
- Type in the preferred Employee Role Name. This field is required and has a 255-character limit.
  - *Examples: Admin, Inventory Control Manager, Budtender, Trimmer*
- Select the Role Type from the dropdown menu. The following standard list of new Employee Role Types are available:
  - Cultivation
  - Manufacturing/Production
  - Testing
  - Retail/Sales
  - Distribution
  - Transportation
  - Wholesale

- Waste Disposal
- Microbusiness
- Select the permissions that need to be granted by clicking the checkbox(es). When complete, click the Create Employee Roles button – **see Figure 1.**



**Add Employee Roles**

Employee Role #1 (clear)

Name  \* This field is required

Role Type - Select -

**Permissions**

**Packages Page**

- Grids (req'd) ☐ View
- Inventory ☐ Manage
- Create/Submit/Disc. ☐ Manage
- Notes ☐ Manage
- Product Destruction ☐ Manage

**Transfers Menu**

- Licensed & External ☐ View ☐ Manage
- Templates ☐ View ☐ Manage

**Sales Menu**

- Sales Delivery ☐ View ☐ Manage
- Retailer Delivery ☐ View ☐ Manage

**Trips Menu**

- All ☐ View ☐ Manage

**Catalog Menu**

- Brands ☐ View ☐ Manage
- Global Products ☐ View ☐ Manage

**Financials Menu**

- All ☐ Manage
- Invoices ☐ View

**Reports Menu**

- All ☐ View

**Admin Menu**

- Tag Orders ☐ Manage
- Tags ☐ Manage
- Strains ☐ Manage
- Items ☐ Manage
- Transporters ☐ Manage
- Employees ☐ View ☐ Manage

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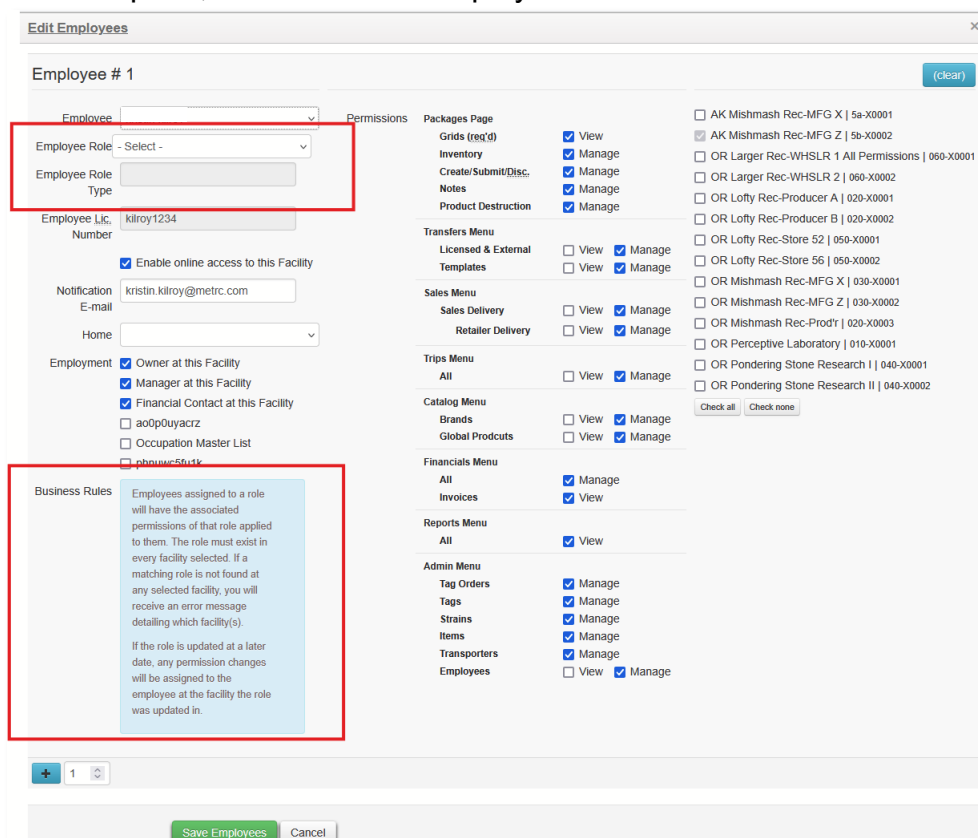
Create Employee Roles Cancel

**Figure 1: Add Employee Roles action window**

To associate employees to specific Employee Roles, take the following steps:

- From the Employee grid, select the employee that needs to have an Employee Role assigned.
- Click the Edit Employee button to open the Edit Employee action window – **see Figure 2 below.**
- Complete the following information:

- **Employee Role:** Select the Employee Role from the drop-down list of options.
- **Employee Role Type:** This is pre-defined by Metrc and will display a blue box explaining the recommended 'Business Rules':
  - If the employee is added in a facility where the role exists by name - the role will be assigned at those facilities but the permissions from that facility will be applied to that role.
  - If a matching role is not found at any of the selected facilities, the Admin will be informed that the role does not exist at the facility.
  - If the employee being added is part of more facilities than the Admin that is adding the employee, the employee is created only at the selected facilities based on the admins users access.
- All other information can be updated in the action window, as needed.
- When complete, click the Save Employees button.



**Edit Employees**

Employee # 1

Employee Role: - Select -

Employee Role Type

Employee Lic. Number: kilroy1234

Enable online access to this Facility: ☒

Notification E-mail: kristin.kilroy@metrc.com

Home:

Employment: ☒ Owner at this Facility, ☒ Manager at this Facility, ☒ Financial Contact at this Facility, ☐ ao0p0uyacz, ☐ Occupation Master List, ☐ phone:555-1234

**Business Rules**

Employees assigned to a role will have the associated permissions of that role applied to them. The role must exist in every facility selected. If a matching role is not found at any selected facility, you will receive an error message detailing which facility(s).

If the role is updated at a later date, any permission changes will be assigned to the employee at the facility the role was updated in.

**Permissions**

**Packages Page**

Grids (reg'd): ☒ View, ☒ Manage

Inventory: ☒ Manage

Create/Submit/Disc.: ☒ Manage

Notes: ☒ Manage

Product Destruction: ☒ Manage

**Transfers Menu**

Licensed & External: ☐ View, ☒ Manage

Templates: ☐ View, ☒ Manage

**Sales Menu**

Sales Delivery: ☐ View, ☒ Manage

Retailer Delivery: ☐ View, ☒ Manage

**Trips Menu**

All: ☐ View, ☒ Manage

**Catalog Menu**

Brands: ☐ View, ☒ Manage

Global Products: ☐ View, ☒ Manage

**Financials Menu**

All: ☒ Manage

Invoices: ☒ View

**Reports Menu**

All: ☒ View

**Admin Menu**

Tag Orders: ☒ Manage

Tags: ☒ Manage

Strains: ☒ Manage

Items: ☒ Manage

Transporters: ☒ Manage

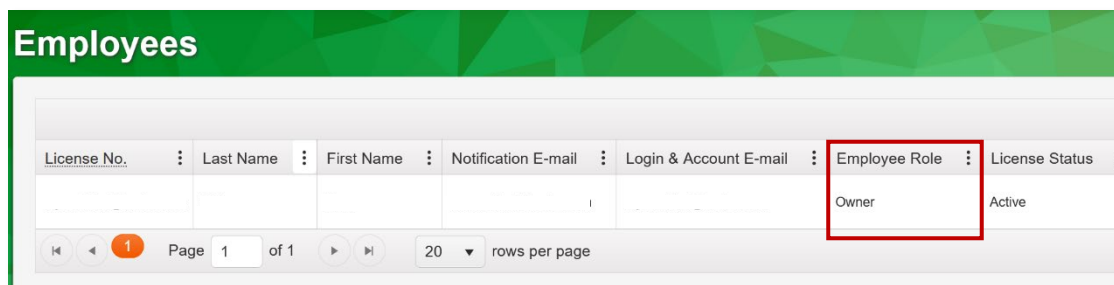
Employees: ☐ View, ☒ Manage

**Check all** **Check none**

**Save Employees** **Cancel**

**Figure 2: Edit Employees action window**

The Employees grid – under the Admin view – will now display the Employee Role associated to the employed user – **see Figure 3 below.**



License No.	Last Name	First Name	Notification E-mail	Login & Account E-mail	Employee Role	License Status
					Owner	Active

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**Figure 3: Employee Roles column on Employees grid**

To archive an Employee Role, simply click the “X” button on the far-right of the role from the Active tab.

**Note:** Existing employees with this role will remain, however, no new employees can be assigned an archived employee role.

## **NEW FEATURE 2**

### **Sublocations**

A new, optional Sublocations feature was designed to provide more granular control and organization of physical or virtual spaces. For licensed cannabis businesses who choose to be more specific with their locations, Sublocations provides a powerful way to:

- Map and monitor every area within a facility.
- Organize rooms and zones within a facility.
- Optimize plant and package management workflows and gain more visibility.
- Ensure compliant traceability in the supply chain.

To learn more, check out the “What’s New” section in Metrc Expert and read on for more information regarding creating and designating Sublocations for Immature Plant Batches, Vegetative Plants, Flowering Plants, Harvested Plants, and Packages.

### **Sublocations Overview**

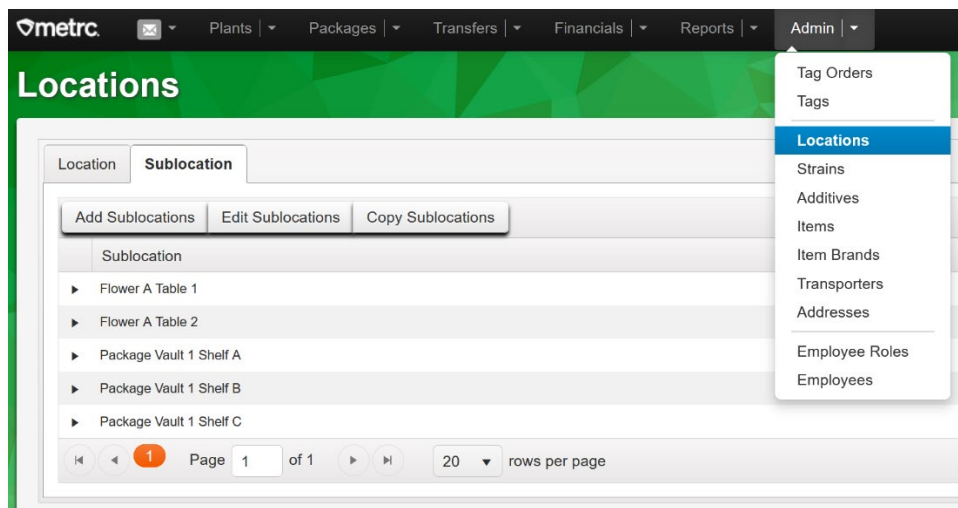
While immature plant batches, plants, and packages in Metrc will continue to require a location, the new, optional Sublocations feature offers the ability to enhance the effectiveness of location movement more granularly.

Sublocations are optionally available in the following areas of Metrc:

- Create Plantings
- Create Plants
- Split Planting
- Change Growth Phase
- Create Package from Planting
- Create Package from Plant
- Create Package from Harvest
- Harvest Plant
- Manicure Plant
- Receive (Licensed and Unlicensed) Transfers
- Create Package from Package

To access Sublocations, access the Admin dropdown from the navigational toolbar and select Locations. The Locations grid allows users with the proper permissions to access the Sublocations tab.

From the Sublocations tab on the Locations grid, click the Add Sublocations button – see **Figure 4**.



**Figure 4: Access Sublocations**

**NEW FEATURE 3**

## **Creating new Items and Strains from the same Packages screen**

To streamline operations, minimize errors related to missing information, and eliminate the need to navigate to separate screens, new functionality is now available that

**Notes:**

- Item categories requiring state approval can be created but will not be available until they are approved by the State.
- Users must have permissions that grant the ability to create strains and items to be able to see the new button in the Packages action window.

To learn more, check out the “What’s New” section in Metrc Expert and read on for more information.

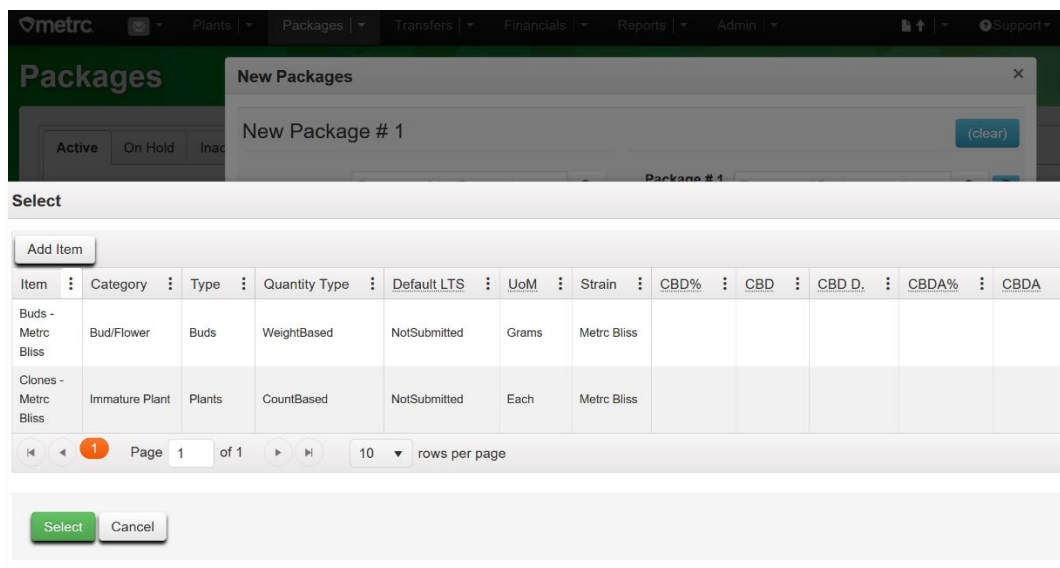
## **Creating Items from the New Packages Action Window**

When creating a New Package, whether from an Immature Plant Batch, Harvest or other package, the ability to create new Strains or Items from the New Packages action window is available. This functionality is available in both the Plants and Packages areas of Metrc.

This new feature enables users to:

- Create new strains and items directly within the new package action window in Metrc.
- Easily add any missing strains or items without interrupting the process, as these functions are integrated into the new package creation workflow.
- Ensure all necessary data is available during the new package creation.

Now, when in the New Packages action window, when selecting the magnifying glass to select an Item Name, there is a new Add Item button available. Click the Add Item button to create a new item to open the Add Item action window.



Item	Category	Type	Quantity Type	Default LTS	UoM	Strain	CBD%	CBD	CBD D.	CBDA%	CBDA
Buds - Metrc Bliss	Bud/Flower	Buds	WeightBased	NotSubmitted	Grams	Metrc Bliss					
Clones - Metrc Bliss	Immature Plant	Plants	CountBased	NotSubmitted	Each	Metrc Bliss					

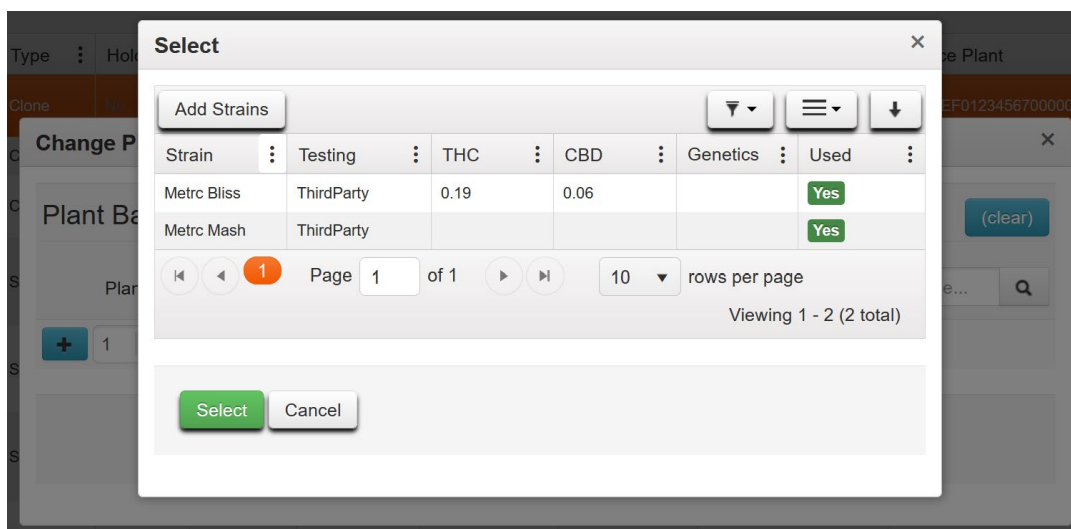
**Figure 5: Create a new Item Name when creating a New Package**

Once the Add Item action window has been completed, the new item name will be available for use and will be auto-populated in the Item Name field of the New Packages action window.

**Reminder:** Item categories requiring state approval can be created but will not be available until they are approved by the State.

## Creating Strains from the Change Strains Action Window

When changing the strain on an Immature Plant Batch or Plant, and when selecting the magnifying glass to select the new strain, there is a new Add Strain button available. Click the Add Strain button to create a new strain to open the Add Strain action window to create a new strain – **see Figure 6.**



**Figure 6: Create a new Strain when changing strain on an Immature Plant Batch or Plant**

### 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 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.

#### Metrc Learn

Metrc Learn is designed to provide users with interactive, educational information on system functionality to expand skillsets and drive workflow efficiencies.

Accessing [Metrc Learn](#) is simple through the following convenient locations:

#### From within the Metrc system

Navigate to the Support area on the navigational toolbar and select “Sign up for Training” to register.

#### Access additional resources

In the Metrc system, click on the Metrc Expert icon and search for the appropriate topic or type in a question.

Thank you for your continued partnership.