

Bulletin Number:	Distribution Date:	Effective Date:						
RI_IB_0037	06/23/2025	06/23/2025						
Contact Point: Metrc	Subject: New features: Employee Roles, Sublocation							
Support	and Create Items/Strains update							
Reason: 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 255character 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
 - o **Testing**
 - o Retail/Sales
 - o Distribution
 - o Transportation
 - o Wholesale

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



- o 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.

dd Employee Roles				>
Employee Role # 1 * This field is required)			(clear)
Name Role Type - Select -	~	Permissions	Packages Page Grids (reg'd) Inventory Create/Submit/ <u>Disc.</u> Notes Product Destruction	 View Manage Manage Manage Manage Manage
			Transfers Menu Licensed & External Templates	◯ View◯ Manage◯ View◯ Manage
			Sales Menu Sales Delivery Retailer Delivery	View Manage
			Trips Menu All	🗌 View 📄 Manage
			Catalog Menu Brands Global Prodcuts	☐ View ☐ Manage ☐ View ☐ Manage
			Financials Menu All Invoices	☐ Manage ☐ View
			Reports Menu All	□ View
			Admin Menu Tag Orders Tags Strains Items Transporters Employees	 Manage Manage Manage Manage Manage Manage View Manage
+ 1 0				
Create Emplo	yee Roles C	ancel		

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:

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



- **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.

Employee Role Employee Role Employee Role Type	- Select - v	Permissions	Packages Page Grids (reg'd) Inventory Create/Submit/ <u>Disc.</u> Notes Product Destruction	 View Manage Manage Manage Manage Manage 	AK Mishmash Rec-MFG X [5=x0001 AK Mishmash Rec-MFG X [5=x0001 AK Mishmash Rec-MFG X [5=x0002 OR Larger Rec-WHSLR 2 060-x000 OR Larger Rec-WHSLR 2 060-x0002 OR Larger Rec-WHSLR 2 060-x0001 OR Larger Rec-WHSLR 2 060-x0002 OR Larger Rec-WHSLR 2 060-x0001 OR Larger Rec-WHSLR 2 060-x0002 OR LARGER 2 060-x0002 OR LAR
Employee Lic. Number	kilroy1234 ✓ Enable online access to this Facility		Transfers Menu Licensed & External Templates	 □ View ✓ Manage □ View ✓ Manage 	OR Lofty Rec-Producer B 020-X0002 OR Lofty Rec-Store 52 050-X0001 OR Lofty Rec-Store 56 050-X0002
Notification E-mail Home	kristin.kilroy@metrc.com		Sales Menu Sales Delivery Retailer Delivery	 □ View ✓ Manage □ View ✓ Manage 	OR Mishmash Rec-MFG X 030-X0001 OR Mishmash Rec-MFG Z 030-X0002 OR Mishmash Rec-Prod'r 020-X0003 OR Mishmash Rec-Prod'r 020-X0003 OR Decreative observer. 040-X0004
Employment	 Owner at this Facility Manager at this Facility 		Trips Menu All	🗌 View 🔽 Manage	OR Perceptive Laboratory 010-x0001 OR Pondering Stone Research I 040-x0001 OR Pondering Stone Research II 040-x0002
	Financial Contact at this Facility ao0p0uyacrz Occupation Master List		Catalog Menu Brands Global Prodcuts	□ View☑ Manage□ View☑ Manage	Check all Check none
Business Rules	Employees assigned to a role	1	Financials Menu All Invoices	✓ Manage ✓ View	
	will have the associated permissions of that role applied to them. The role must exist in		Reports Menu All	View	
	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.		Admin Menu Tag Orders Tags Strains Items Transporters Employees	 Manage Manage Manage Manage Manage Manage View Manage 	

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.**



mploye	es						1				
License No.	:	Last Name	:	First Name	:	Notification E-mail		Login & Account E-mail	:	Employee Role	License Status
										Owner	Active
H • 1	Pag	je 1 of	1	() (H)	20	▼ rows per page					

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.

Smetrc.

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

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.**

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

Smetrc.

♥metrc. 🔤 - Plants - Packages - Transfers - Financials - Reports -	Admin -
Locations	Tag Orders Tags
Sublocation Add Sublocations Edit Sublocations	Locations Strains Additives Items
Sublocation Flower A Table 1 Flower A Table 2	Item Brands Transporters Addresses
Package Vault 1 Shelf A Package Vault 1 Shelf B Package Vault 1 Shelf C	Employee Roles Employees
Page 1 of 1 Page 20 v rows per page	

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.

Smetrc

⊘metr																				-
Pac	kages		N	ew Packages														×		
Active On Hold Inac														(clear)						
Select																				
Add Item	n																			
Item :	Category	:	Туре :	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 Pla	int	Plants	CountBased		NotSubmitted		Each		Metrc Bliss										
	1 Page	•	1 of 1	() ()	10	 rows per 	pag	le												
Selec	Cancel	ì																		
		1																		

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**.

Smetrc.

Туре :	Hold	Select											×	e Plant	
Clone	No	Add Strain	s								7 •	≡∙〕	Ŧ	EF0123456700000	1
c Chang	je P	Strain	:	Testing	:	THC	:	CBE	D	:	Genetics :	Used	:	×	
0 Dian	+ De	Metrc Bliss		ThirdParty		0.19		0.06				Yes			
Plan		Metrc Mash		ThirdParty								Yes		(clear)	
s	Plar	H 4	1	Page 1		of 1) H		10	•	rows per page	e		e Q	
											Viewing	1 - 2 (2 t	total)		
s +	1														
		Select	Ŀ	Cancel											
s															
								_	_						

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 <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 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.