User Group Meeting 1 - 2024

Wednesday, February 29, 2024

9:00 a.m. – 12:00 p.m.

Agenda

1. **Welcome and introductions**
2. **Items resolved from 2023**
3. **Current roadmap and updates**
4. **Defining Metrc development**
5. **Moving forward and next steps**

Introductions

Chris Fisher
Metrc Customer Success Manager

Adrienne Landingham
Metrc Regional Director, Customer Success

Stephanie Garza
Metrc Associate Customer Success Manager

Items resolved from 2023

(1) Negative Plant Batches

Backend job completed in January – negative plant batches adjusted to (0)

(3) Missing Transporter information

When selecting "edit", previously missing license information now appears

(5) Auto refresh

Use the internal refresh button – *see example on next page*

(2) Missing manifests

All transfer manifests should now appear in the UI based on their respective status

(4) Processing Jobs

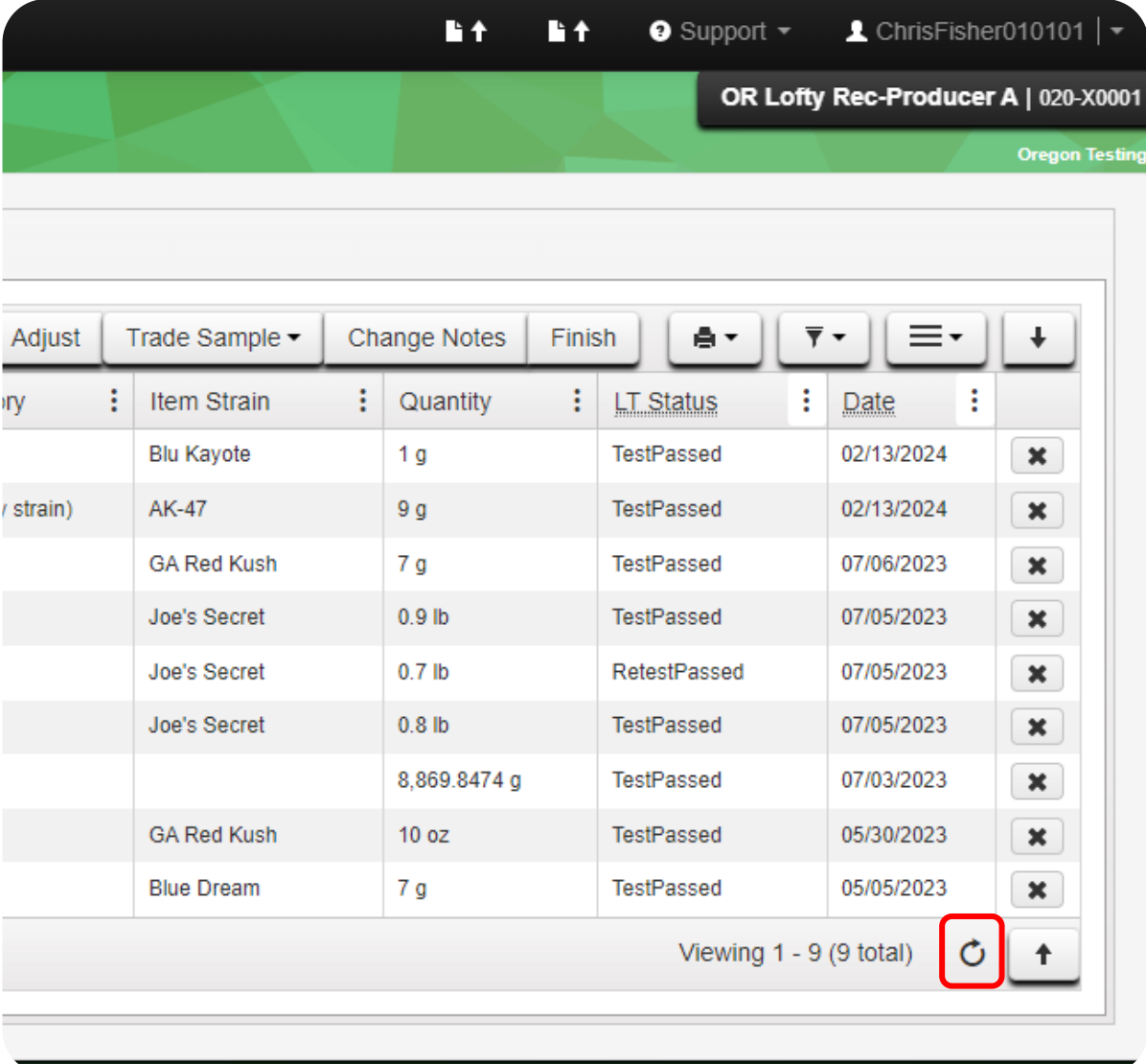Ability to create packages out of Processing Jobs is now available

Auto refresh

Feedback

Users did not see table updates when completing actions such as creating packages or destroying plants. This resulted in duplicate actions or inefficiencies when using the system.

Action
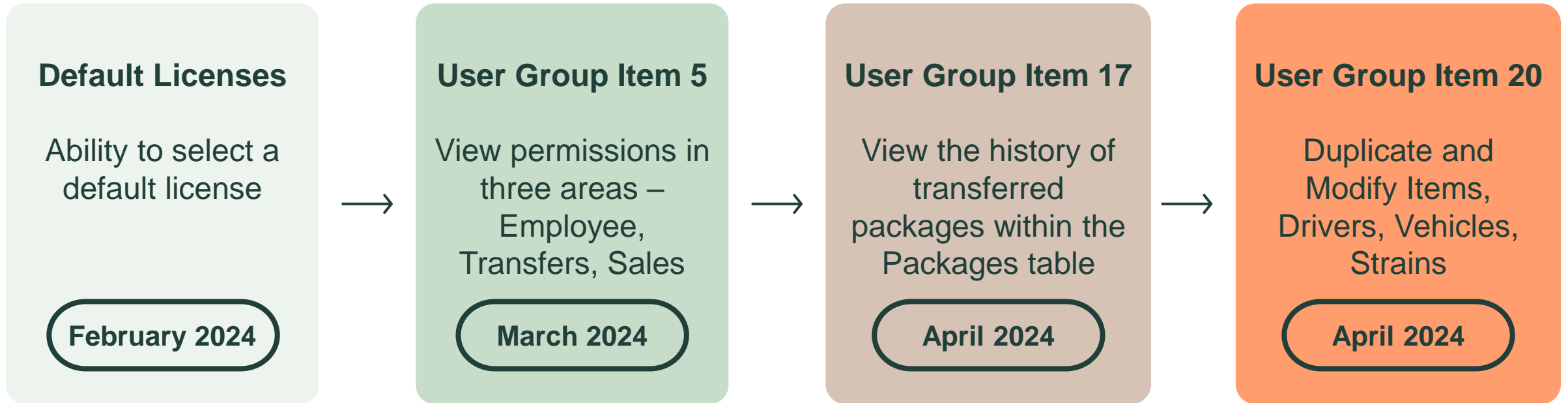
1. Click the internal "refresh" button.

Current roadmap and feature updates

Current roadmap

2023 User Group items on the current roadmap with target release dates.

Default Licenses	User Group Item 5	User Group Item 17	User Group Item 20
Ability to select a default license	View permissions in three areas – Employee, Transfers, Sales	View the history of transferred packages within the Packages table	Duplicate and Modify Items, Drivers, Vehicles, Strains
February 2024	**March 2024**	**April 2024**	**April 2024**

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Default Licenses

Feedback

As a user with multiple licenses, I would like to select a default license to open each time I log in.

Actions

1. Open your user profile
2. Select "Default Facility" dropdown menu
3. Select the license to default
4. Save profile

User Profile

Contact Info.

Full Name	Chris Fisher
E-mail	Chris.Fisher@metrc.com
Phone Number	ex. +1-123-456-7890

Security Info

Username	ChrisFisher0101
Password	••••••••••••
Confirm Password	••••••••••••

Account Reco

Security Question

Security Answer

☐ View Security Answer

User Prefere

Save grid configurations [?]
remotely ☐

Default Facility [?]   - First Available -

- First Available -
060-X0001 - OR Larger Rec-WHSLR 1
060-X0002 - OR Larger Rec-WHSLR 2
020-X0001 - OR Lofty Rec-Producer A
050-X0002 - OR Lofty Rec-Store 56
030-X0001 - OR Mishmash Rec-MFG X
030-X0002 - OR Mishmash Rec-MFG Z
020-X0003 - OR Mishmash Rec-Prod'r
010-X0001 - OR Perceptive Labs

Feature updates

1

Quick Scan

Transfers and Packages – reduce clicks when using a barcode scanner to add packages.

2

In Transit tab – Packages

Displays packages that are actively in transit with the associated manifest number.

3

Unreject button – Transfers

Allows users to accept previously rejected packages.

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Unreject packages

Live demo

A package is rejected on an incoming transfer – the Unreject button allows users to correct the action.

Defining Metrc development

Metrc development overview
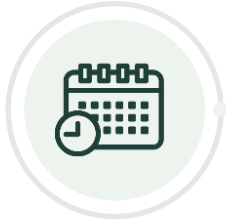
Custom Development Request

- Specific feature or change to meet a specification from a state agency

- Cost to develop

- Roadmap prioritization

- Delivery date specified

- Managed by a Product Owner with a dedicated Development team

Feature Request

- Suggestions from states, User Groups, User Exchanges, and Support cases

- Review and scoring based on overall industry value

- Delivery dates are determined when the work begins

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Releases and QA process

Continued efforts to improve predictability and quality

Release schedule

Metrc uses a staggered release schedule to minimize impact

Issue identification

Issues identified within 24 hours

Deploying fixes when issues are identified

Hot fixes are deployed within 48-72 hours

2024 process update

Focused on maintaining a global mindset

1st meeting

- Review feature requests from past meetings
- Group to select top (3) items to submit as feature requests

2nd meeting

- Training and demo sessions encompassing top ticket drivers

3rd meeting

- Ideation
- Open to discussion from the annual overview

Next steps

Thank you for your attendance and engagement during the User Group meeting!

Questions?

Please let us know of any outstanding questions.

User Exchange

Date: May 2, 2024

Registration form coming soon!

Additional requests

New enhancement requests:

- Complete the Metrc Feature Request template

- Submit feature request to the Support Portal

Thank you!