



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

Metric Customer Success Manager

Adrienne Landingham

Metric Regional Director, Customer Success

Stephanie Garza

Metric Associate Customer Success Manager

Items resolved from 2023

1 Negative Plant Batches

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

2 Missing manifests

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

3 Missing Transporter information

When selecting “edit”, previously missing license information now appears

4 Processing Jobs

Ability to create packages out of Processing Jobs is now available

5 Auto refresh

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

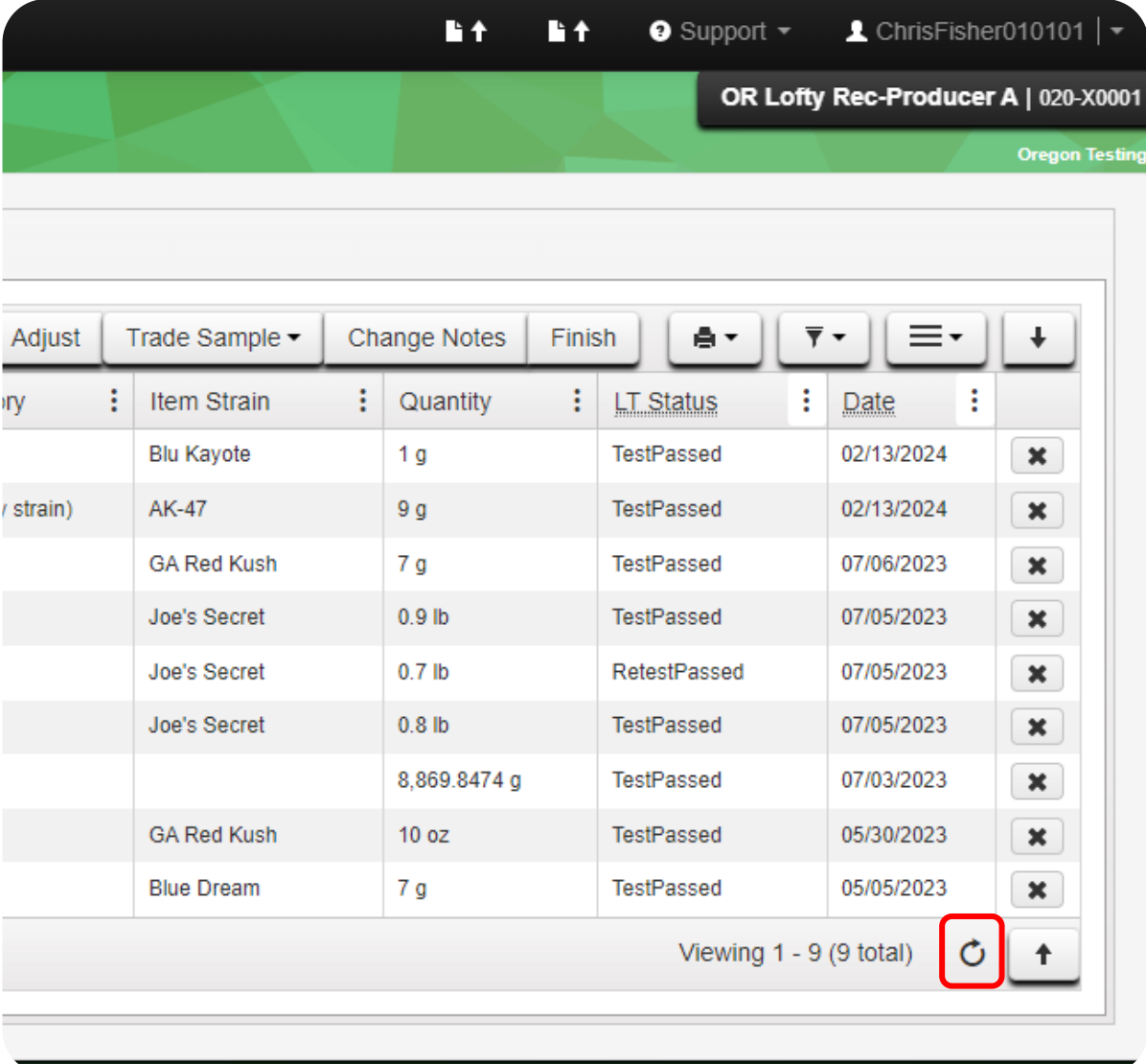
Auto refresh

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.



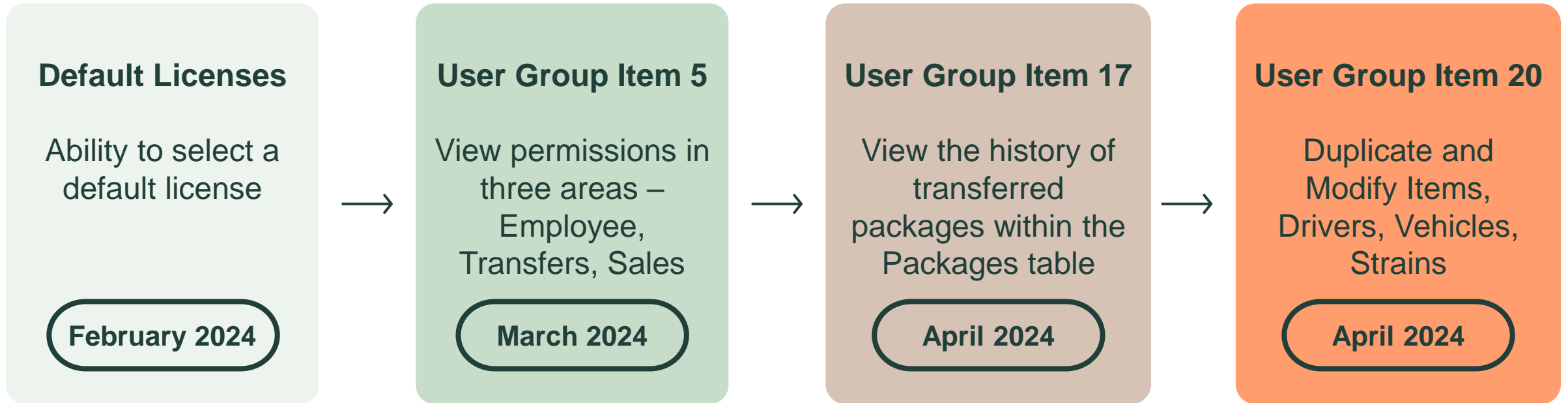
The screenshot shows a web application interface for "OR Lofty Rec-Producer A | 020-X0001" with "Oregon Testing" in the top right. Below the header is a table with columns: Item Strain, Quantity, LT Status, and Date. The table contains 9 rows of data. At the bottom right of the table, there is a "Viewing 1 - 9 (9 total)" label and a red circular refresh button (a circular arrow icon) next to an upward arrow button.

Item Strain	Quantity	LT Status	Date
Blu Kayote	1 g	TestPassed	02/13/2024
AK-47	9 g	TestPassed	02/13/2024
GA Red Kush	7 g	TestPassed	07/06/2023
Joe's Secret	0.9 lb	TestPassed	07/05/2023
Joe's Secret	0.7 lb	RetestPassed	07/05/2023
Joe's Secret	0.8 lb	TestPassed	07/05/2023
	8,869.8474 g	TestPassed	07/03/2023
GA Red Kush	10 oz	TestPassed	05/30/2023
Blue Dream	7 g	TestPassed	05/05/2023

Current roadmap and feature updates

Current roadmap

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



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

The screenshot shows the 'User Profile' page with a green header. The page is divided into sections: 'Contact Info.', 'Security Info.', 'Account Rec...', and 'User Preferen...'. The 'Contact Info.' section includes fields for Full Name (Chris Fisher), E-mail (Chris.Fisher@metrc.com), and Phone Number (ex. +1-123-456-7890). The 'Security Info.' section includes Username (ChrisFisher0101), Password, and Confirm Password. Below these are fields for Security Question and Security Answer, with a checkbox for 'View Security Answer'. There is also a checkbox for 'Save grid configurations remotely'. A dropdown menu for 'Default Facility' is open, showing a list of license options: '- 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', and '010-X0001 - OR Perceptive Labs'. The 'Default Facility' label is highlighted with a red box.

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.

Live demo

Unreject packages

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

	ETA	ATA	Received	ETRD	ATRD	ETRA	ATRA	
	01/25/2024 10:15 am							Receive
	01/04/2024 04:00 pm							Receive
	11/02/2023 03:07 pm		11/02/2023 01:11 pm	01/04/2024 12:27 pm		01/04/2024 12:27 pm		Unreject
022 m	04/15/2022 10:38 am	04/15/2022 10:40 am						Receive
	11/09/2021 09:08 am							Receive
	11/08/2021 01:32 pm							Receive
021 m	03/23/2021 09:59 am	03/23/2021 10:15 am	03/23/2021 10:16 am	03/23/2021 10:24 am		03/23/2021 10:24 am		Unreject
	01/28/2019 02:36 pm		07/17/2019 04:29 pm					Unreject
019 m	01/28/2019 02:33 pm	12/15/2019 11:18 pm						Receive
	08/12/2018 11:26 pm		09/12/2019 11:55 am					Unreject
	08/12/2018 11:21 pm							Receive

Unreject Transfer

Manifest	0000082301	Transfer Type	Wholesale
Origin Lic. No.	060-X0001	Origin Name	OR LARGER THAN SALES, LLC
Main Phone No.	+1-800-420-MAIN	Mobile Phone No.	+1-800-420-CELL
Transporter Lic. No.	060-X0001	Transporter Name	OR LARGER THAN SALES, LLC
Phone No. for Questions	5556667789		
Employee ID	999999	Vehicle Make	Toyota
Driver's Name	Ben Bunny	Vehicle Model	Toyota
Driver's Lic. No.	C01334W	License Plate	2FAST
Package # 1	ABCDEF012345670000015312	Item	Buds - GA Red Kush
		Shipped Qty.	100 g
		Receive Qty.	100 Grams
		Wholesale Price	500
			<input type="checkbox"/> Reject

Receive Transfer Cancel



Defining Metrc development

Metric development overview

Custom Development Request

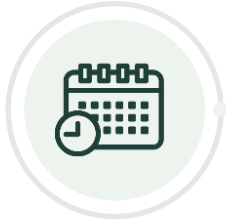
- Specific feature or change to meet a specification from a state agency
- Cost to develop
- Roadmap prioritization
- Delivery date specified
- Managed by a Product Owner with a dedicated Development team

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

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!