

Category	Bucket	Problem	Essence of Issue	Potential Solutions Identified by Workgroup
1	API	Frequency of API errors (regardless of API vendor)	API integration is lacking in some regards which wastes resources and time in business operations. This time includes: creating manifests, fixing common and frequent errors, and recording important details such as retail waste, returns, destruction, and creating new seedling batches through current clones/seeds.	Third party vendors can contact Metrc's API support team to troubleshoot particular issues
	API	No API for manifests		
	API	No automation for common tasks causing users to have to toggle between both Metrc and their third party software. These include, but are not limited to recording retail waste/returns/destruction and recording the taking of clones and/or seeds from existing plants in order to create new batches of seedlings		
2	Customer Service	Users have no direct way to provide feedback to Metrc. When they speak to customer support, they are told OCP is Metrc's customer, not them	There is conflicting information regarding ownership and responsibilities between Metrc and OCP. As a result, customer service within Metrc has been limited and significantly impacted day-to-day business operations.	OCP/Metrc to establish some mechanism by which Maine users can provide continual feedback to Metrc
	Customer Service	Increased customer service wait times in early 2022, especially after new states were brought online, leading to extremely long wait times and even longer resolution times		
	Customer Service	Users report not getting called back despite utilizing Metrc's "request a call back" functionality		Allow users to schedule a call back time, one that works with <u>their</u> schedule and allows them to be near a computer
	Customer Service	Not enough advance notice when services might be impacted, although this has gotten better recently		Continue to provide advance notice for potential service interruptions and advance notice of upcoming functionality changes
	Customer Service	New users have limited means of accessing customer support specific to onboarding issues		Create a dedicated team (including an Onboarding Specialist) within the customer service department to provide support specifically to new users
	Customer Service	Users, new ones in particular, often have the same pain points and ask the same questions, but no "go-to" resource exists to troubleshoot those common issues		Revisit and expand FAQs, then make them accessible in the Metrc dashboard
3	Functionality	Some operations are unable to be undone after a certain period of time and will become a permanent fixture within a user's Metrc account; errors made when setting up inventory are particularly problematic	Metrc functionality needs improvement, particularly for preventing errors from onset or providing avenues to correct errors throughout business operations.	Discontinue or archive functionality to retroactively remove errors
	Functionality	Reporting functionality		When Metrc rolls out Tableau, users will need training and other resources
	Functionality	No automation for test sample creation and transfers; no software can automate testing "check boxes"		
	Functionality	CSV uploads are "all or nothing" not "row by row," so any error in the file will create an upload error/does not allow for complete data transfer; errors in one row of a CSV file will cause the whole CSV upload to fail		
	Functionality	Insufficient upfront information for unaffiliated transfers		Increase visibility of non-proprietary information for unaffiliated transfers: harvest date, test date, pass/fail remediation data
	Functionality	Batch tracking functionality		Training and other resources will be needed to ensure users know how to properly batch track products when implemented
4	Reports	Canned reports sometimes have column format issues (Ex: XLS will report in LBs rather than grams)	Canned reports are not providing value in current formats.	Retain selected units of measure and/or field formatting options
	Reports	Users need to know the oldest product date in order to reconcile active inventory at the end of each business day		Allow for active inventory to be reconciled at the end of each business day without having to know the oldest product date
	Reports	Existing reports in Metrc are not sufficient to manage business operations so third party software is sometimes needed		Future integration with Tableau being discussed by Metrc
	Reports	Inability to view what the data looked like on a given date and time		
	Reports	Gaps in the reports provided versus reports desired		Additional reports desired: production output, returns, grow time, waste, yields; create more reports specific to license type

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	Reports	Unnecesary steps required to manually "finish" a product even if inventory is "empty." Until a product is "finished" it will continue to show up in inventory reports even though there is <u>no</u> inventory		
5	Testing	Downstream licensees cannot always see the entire testing history for a given package if a production batch was involved	Testing data is not transparent nor automated.	
	Testing	Testing functionality is too manual creating opportunities for human error		Streamline testing selection process
6	Training	New business training is too generic; not sufficient to set up new users for success	Training is not specific to Maine's system, and therefore too generic to be applicable. Trainings can be enhanced by creating a "Maine Sandbox" environment and/or with more tailoring to Maine's regulatory system in written guidance focused on reporting and other functionalities.	New user training by license type; future video trainings not recorded in monotone (i.e., more engaging); expand training to include how to accept an incoming transfer and what room to put it into
	Training	Lack of Maine specific content in existing training materials, specifically the starting guidance		Revise and/or expand the new business training and existing materials to be Maine specific, where possible
	Training	Lack of content and training for more advanced users		
	Training	More diverse training materials are needed		Create/expand training materials; not just videos, but also guides and step-by-step instructions with screenshots. Also include materials in Metrc dashboard, not just on Metrc website
	Training	Any new functionality - sandbox, discontinue, customizations, batch tracking - should be accompanied by training and support materials for users		Develop training and support materials for users as new functionalities become available
	Training	There are not enough trainings on existing report functionality		Develop/expand training on existing report functionality, including how to use the reporting tool
	Training	No Metrc virtual sandbox - New business training is too generic; not sufficient to set up new users for success, especially re: initial inventory set up		Create a sandbox based on the Oregon model OR develop a test environment sandbox
7	UX	System allows for users to input incorrect information (even when it is clearly wrong)	The Metrc interface is not user friendly for licensee types in Maine specifically and therefore is a barrier to success instead of a tool for successful regulatory compliance.	Develop pop-ups or a "wizard" to alert users when incorrect data is being entered; a wizard can act as a guide when navigating the system
	UX	Some selection items do not make sense for Maine license types		Create selection items more specific to Maine license types
	UX	No way to remove unsuccessful phenohunt; can't rename a seed once they've found a successful one (strains have to be numbered to tie them back to the seed)		Ability to archive unused items
	UX	Limited customizations and "tedious" clicking		Customizable homepage settings to include commonly used inventory at top of lists; presets for the number of visible records per page
	UX	Workflows aren't streamlined for repetitive business processes, leading to "tedious" clicking		Explore opportunities for business defined workflow templates/streamlining
	UX	Yellow payment pop-ups: users who set up automatic payments are still hounded by these pop-ups until the payment clears the bank		Remove or limit payment notifications for any user who has set up automatic payments