



# LEAF

DATA SYSTEMS

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POWERED BY MJ FREEWAY

Leaf Data Systems  
State of Washington  
*User Manual v 0.6*  
*(released 09/05/2017)*

**Published by:**  
MJ Freeway<sup>®</sup>, LLC

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## PART ONE: Table of Data Set Descriptions

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## Production Facility Data Set Descriptions

DATA SET	DESCRIPTION
Admin Setup	<p>Prior to performing day-to-day operations at a facility, an administrative user of the facility must set up certain information, to include: User Profiles, Areas, Strain, and Inventory Items.</p> <ul style="list-style-type: none"> <li>•</li> </ul>
Admin Setup: User Profiles	<p>User Profiles identify individual team members who will have access to Leaf Data Systems.</p> <p>User authorization levels include the following options:</p> <ul style="list-style-type: none"> <li>• Disabled—users who do not have access to the database</li> <li>• View—users that are able to see the data within the database without being able to perform any functions to change the data</li> <li>• Edit—users that are able to edit the data within the database, excluding the administrative functions</li> <li>• Admin—users that are able to edit the data within the database, including the administrative functions</li> </ul> <p>Usernames consist of the individual’s email address, which is also used to fulfill password reset requests.</p> <p>Passwords must be at least 12 characters in length and must contain (at least) one of each of the following: uppercase letter, lowercase letter, number, and symbol (!@#\$%^&amp;*&lt;&gt;?).</p>
Admin Setup: Areas	<p>Areas within a facility represent the physical locations where plants or inventory lots may be present. Setting up areas at a facility enables physical reconciliation of plants and inventory lots with system counts.</p>
Admin Setup: Strains	<p>Strains that will be present at a facility (in the form of plants or strain-specific inventory lots) must be designated within the database for selection within plant and inventory lot records.</p>
Admin Setup: Inventory Items	<p>Inventory Items represent the concept of the products that will be produced, processed, or sold at a facility. They carry global attributes associated with the product, but do not represent physical inventory.</p>
Adding Batches	<p>There are three types of batches: plant, harvest, and extraction.</p> <p>Plant batches must be created in order to house groups of plants of the same strain, planted at the same time, that will be grown in homogenous conditions.</p> <p>Harvest batches represent plants of the same strain, harvested at the same time, that were grown in homogenous conditions.</p> <p>Extraction batches represent batches of inventory, typically extracted or infused products, that are made up of multiple harvest batches that have been combined.</p>

	At a production facility, all living plants must be associated with a plant batch. All harvest plants must be associated with a harvest batch. Extraction batches are found when harvest batches are combined, for example, small amounts of trim from multiple harvest batches can be combined into a mixed batch and sent for processing.
Modifying Batches	The attributes of a batch of plants can be adjusted by modifying the batch record.
Adding Plants	While plants can be created upon the creation of a plant batch, they can also be added to an associated batch after it has been created by adding a plant record.
Modifying Plants	Plant records may be modified to add attributes, such as a mother plant designation, or shift individual plants from area to area or stage to stage.
Disposing of Plants or Batches	Plants or batches can be destroyed using the disposal function. <i>NOTE: Disposing of a plant or batch implies that it once existed and is being destroyed.</i>
Deleting Records	Plant or batch records can be deleted. <i>NOTE: Deleting a plant or batch record implies that the record was created in error, and that the plant or batch never existed.</i>
Harvest Process	Wet weight of a harvest represents the total weight of the harvest batch immediately after the plants are cut down.  Cured weight of a harvest represents the total dried weight of the flower and other material that comprises the harvest batch.  Waste weight can be entered for a harvest batch at any step throughout the harvest process.
Creating Inventory Lots	Inventory lots are created from harvest batches, and can either be comprised of 'flower' or 'other material'.
Inventory Lot Functions	Once inventory lots have been created, actions that can be performed from the 'Inventory Lots' listing include splitting the lots, moving the lots from area to area, or creating disposals of all or part of the lot.
Inventory Adjustments	Inventory adjustment records record the reason for an inventory lot to be adjusted, along with the audit history of the transaction.
Inventory Conversion	Inventory conversions at a production facility are generally performed when bulk flower or trim is pre-packaged into measured containers or pre-rolls.
Transferring Samples to Testing Lab	Lab samples must be sent for testing, and passing test results associated with the sample (which carries through to the entire batch of product), before any inventory associated with the batch may be transferred to other licensed facilities.
Transferring Inventory to Other Licensees	Creating an inventory transfer record allows for designation of the inventory to be transferred and captures the information necessary to populate the transport manifest. Transport manifest records can be found associated to inventory transfers.



## Processing Facility Data Set Descriptions

DATA SET	DESCRIPTION
Admin Setup	<p>Prior to performing day-to-day operations at a facility, an administrative user of the facility must set up certain information, to include: User Profiles, Areas, Strain, and Inventory Items.</p> <ul style="list-style-type: none"> <li>•</li> </ul>
Admin Setup: User Profiles	<p>User Profiles identify individual team members who will have access to Leaf Data Systems.</p> <p>User authorization levels include the following options:</p> <ul style="list-style-type: none"> <li>• Disabled—users who do not have access to the database</li> <li>• View—users that are able to see the data within the database without being able to perform any functions to change the data</li> <li>• Edit—users that are able to edit the data within the database, excluding the administrative functions</li> <li>• Admin—users that are able to edit the data within the database, including the administrative functions</li> </ul> <p>Username consist of the individual's email address, which is also used to fulfill password reset requests.</p> <p>Passwords must be at least 12 characters in length and must contain (at least) one of each of the following: uppercase letter, lowercase letter, number, and symbol (!@#\$%^&amp;* &lt;&gt;?).</p>
Admin Setup: Areas	<p>Areas within a facility represent the physical locations where plants or inventory lots may be present. Setting up areas at a facility enables physical reconciliation of plants and inventory lots with system counts.</p>
Admin Setup: Strains	<p>Strains that will be present at a facility (in the form of plants or strain-specific inventory lots) must be designated within the database for selection within plant and inventory lot records.</p>
Admin Setup: Inventory Items	<p>Inventory Items represent the concept of the products that will be produced, processed, or sold at a facility. They carry global attributes associated with the product, but do not represent physical inventory.</p>
Adding Batches	<p>There are three types of batches: plant, harvest, and extraction.</p> <p>Plant batches must be created in order to house groups of plants of the same strain, planted at the same time, that will be grown in homogenous conditions.</p> <p>Harvest batches represent plants of the same strain, harvested at the same time, that were grown in homogenous conditions.</p> <p>Extraction batches represent batches of inventory, typically extracted or infused products, that are made up of multiple harvest batches that have been combined.</p>

	<p>At a processing facility, there are no plant batches present. Harvest batches are received from production facilities. Any product that is created by combining multiple harvest batches is considered to be an extraction batch.</p> <p>The only time that a batch would be created manually is when initial inventory is being entered into the database. Once this period has ended, all inventory batches should be received into the facility via inventory transfer.</p>
Modifying Batches	The attributes of a batch can be adjusted by modifying the batch record.
Deleting Records	<p>Batch records can be deleted.</p> <p><i>NOTE: Deleting a batch record implies that the record was created in error, and that the batch never existed.</i></p>
Creating Inventory Lots	Inventory lot records can be created, however, the only time this would occur is when initial inventory is being entered into the database. Once this period has ended, all inventory lots should be received into the facility via inventory transfer.
Receiving Inventory Transfers	Inventory transfers add inventory lots to the database of the receiving facility. These inventory lots carry the batch attributes that were assigned to them at the licensed facility from which they were transferred.
Inventory Lot Functions	Once inventory lots have been created or received, actions that can be performed from the 'Inventory Lots' listing include splitting the lots, moving the lots from area to area, or creating disposals of all or part of the lot.
Inventory Adjustments	Inventory adjustment records record the reason for an inventory lot to be adjusted, along with the audit history of the transaction.
Inventory Conversion	Inventory conversions at a processing facility are performed when extraction and infusion processes take place. As well, pre-packaging of bulk inventory into measured containers can be performed by utilizing the inventory conversion function.
Transferring Samples to Testing Lab	Lab samples must be sent for testing, and passing test results associated with the sample (which carries through to the entire batch of product), before any inventory associated with the batch may be transferred to other licensed facilities.
Transferring Inventory to Other Licensees	Creating an inventory transfer record allows for designation of the inventory to be transferred and captures the information necessary to populate the transport manifest. Transport manifest records can be found associated to inventory transfers.

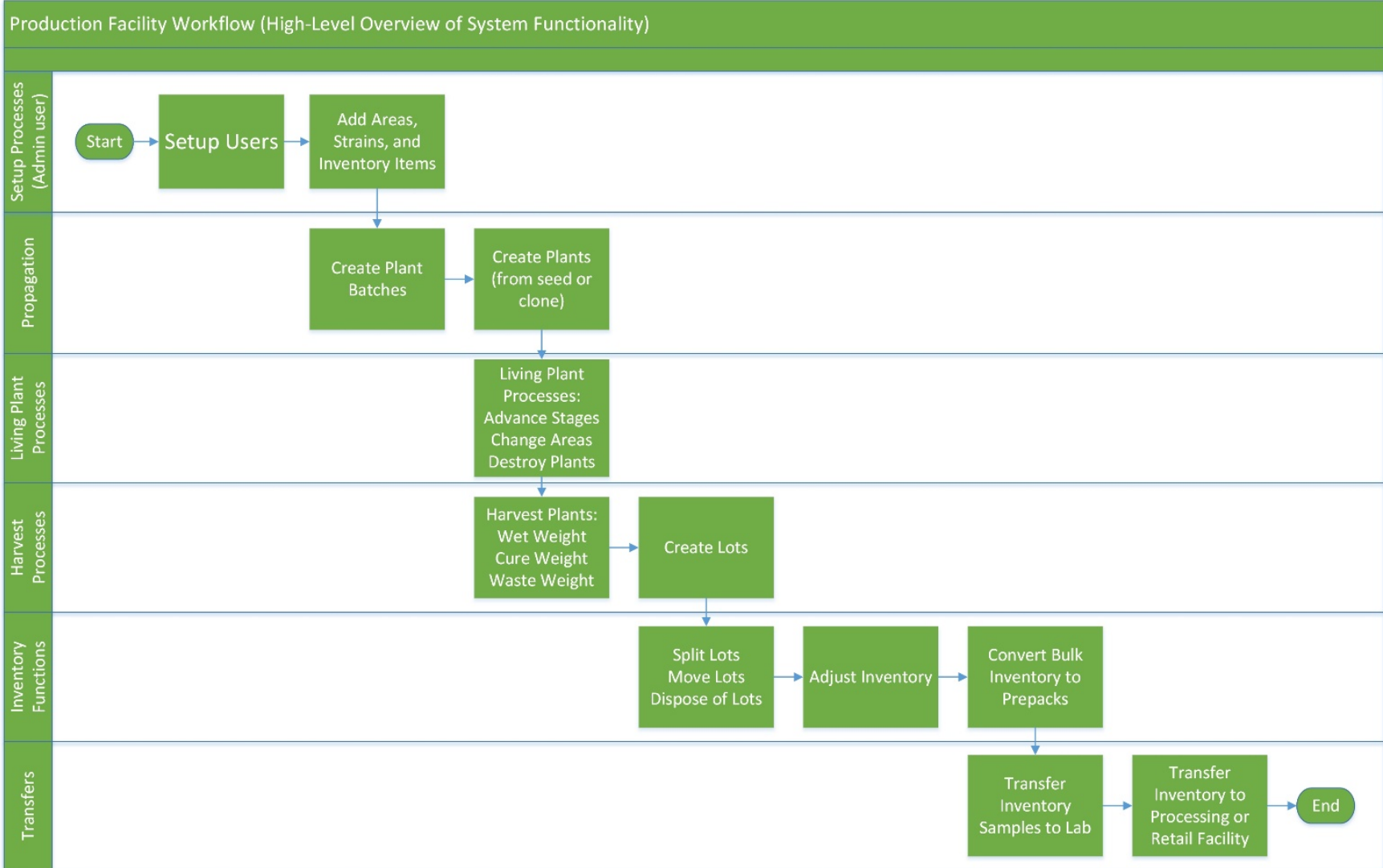
## Retail Facility Data Set Descriptions

DATA SET	DESCRIPTION
Admin Setup	Prior to performing day-to-day operations at a facility, an administrative user of the facility must set up certain information, to include: User Profiles, Areas, Strain, and Inventory Items. <ul style="list-style-type: none"> <li></li> </ul>
Admin Setup: User Profiles	User Profiles identify individual team members who will have access to Leaf Data Systems. <p>User authorization levels include the following options:</p> <ul style="list-style-type: none"> <li>• Disabled—users who do not have access to the database</li> <li>• View—users that are able to see the data within the database without being able to perform any functions to change the data</li> <li>• Edit—users that are able to edit the data within the database, excluding the administrative functions</li> <li>• Admin—users that are able to edit the data within the database, including the administrative functions</li> </ul> <p>Username consist of the individual’s email address, which is also used to fulfill password reset requests.</p> <p>Passwords must be at least 12 characters in length and must contain (at least) one of each of the following: uppercase letter, lowercase letter, number, and symbol (!@#%&amp;*&lt;&gt;?).</p>
Admin Setup: Areas	Areas within a facility represent the physical locations where plants or inventory lots may be present. Setting up areas at a facility enables physical reconciliation of plants and inventory lots with system counts.
Admin Setup: Strains	Strains that will be present at a facility (in the form of plants or strain-specific inventory lots) must be designated within the database for selection within plant and inventory lot records.
Admin Setup: Inventory Items	Inventory Items represent the concept of the products that will be produced, processed, or sold at a facility. They carry global attributes associated with the product, but do not represent physical inventory.
Adding Batches	There are three types of batches: plant, harvest, and extraction. <p>Plant batches must be created in order to house groups of plants of the same strain, planted at the same time, that will be grown in homogenous conditions.</p> <p>Harvest batches represent plants of the same strain, harvested at the same time, that were grown in homogenous conditions.</p> <p>Extraction batches represent batches of inventory, typically extracted or infused products, that are made up of multiple harvest batches that have been combined.</p>

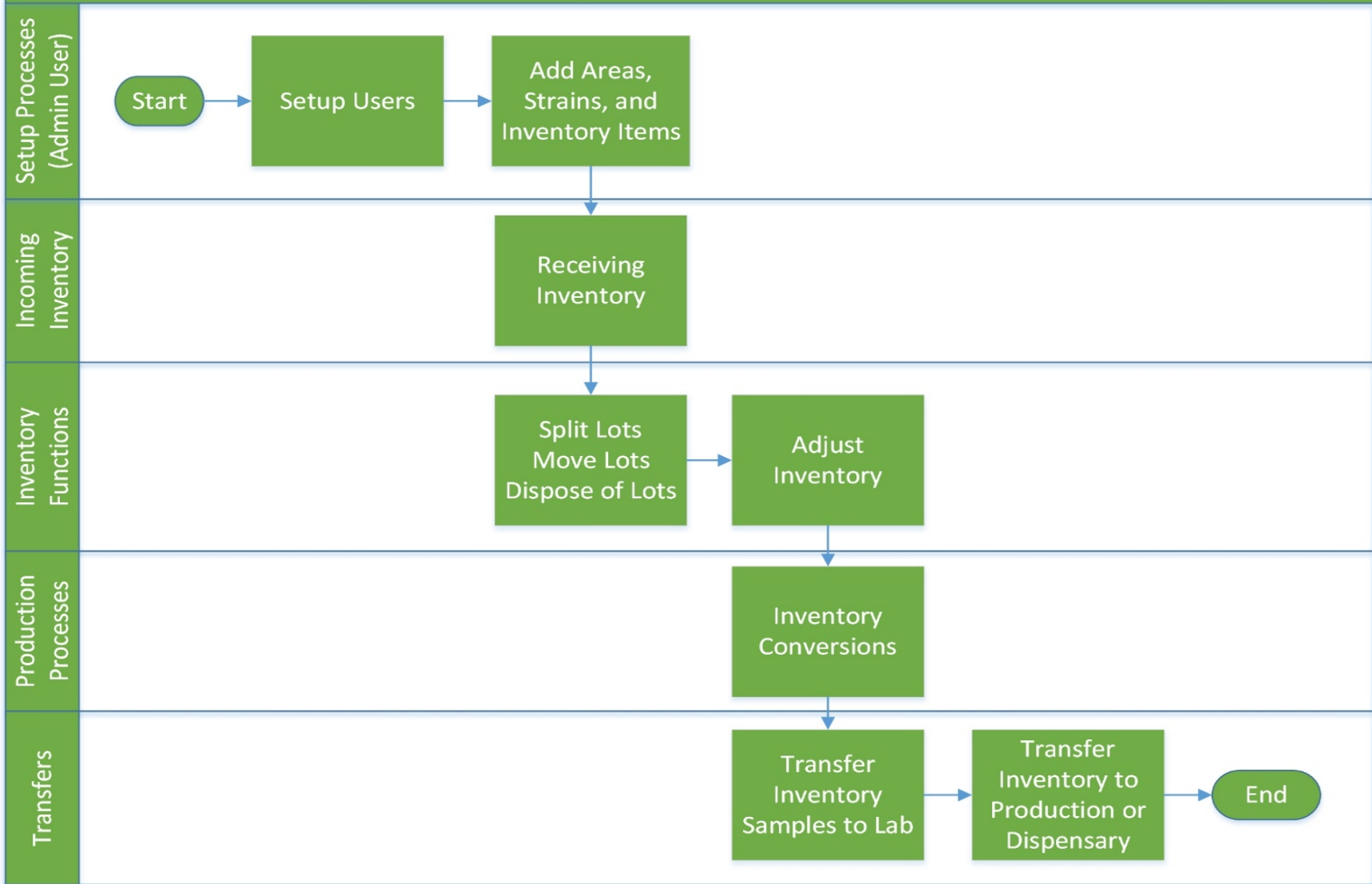
	<p>At a retail facility, there are no plant batches present. Harvest batches are received from production facilities. Any product that is created by combining multiple harvest batches is considered to be an extraction batch, and extraction batches can come from either production or processing facilities.</p> <p>The only time that a batch would be created manually is when initial inventory is being entered into the database. Once this period has ended, all inventory batches should be received into the facility via inventory transfer.</p>
Modifying Batches	The attributes of a batch can be adjusted by modifying the batch record.
Deleting Records	<p>Batch records can be deleted.</p> <p><i>NOTE: Deleting a batch record implies that the record was created in error, and that the batch never existed.</i></p>
Creating Inventory Lots	Inventory lot records can be created, however, the only time this would occur is when initial inventory is being entered into the database. Once this period has ended, all inventory lots should be received into the facility via inventory transfer.
Receiving Inventory Transfers	Inventory transfers add inventory lots to the database of the receiving facility. These inventory lots carry the batch attributes that were assigned to them at the licensed facility from which they were transferred.
Inventory Lot Functions	Once inventory lots have been created or received, actions that can be performed from the 'Inventory Lots' listing include splitting the lots, moving the lots from area to area, or creating disposals of all or part of the lot.
Inventory Adjustments	Inventory adjustment records record the reason for an inventory lot to be adjusted, along with the audit history of the transaction.
Inventory Conversion	Inventory conversions at a processing facility are performed when extraction and infusion processes take place. As well, pre-packaging of bulk inventory into measured containers can be performed by utilizing the inventory conversion function.
Sales Transactions	Inventory sold to customers within the retail facility is recorded as sales transactions. Sales transaction types include sale, return, and void.
Transferring Inventory to Other Licensees	Creating an inventory transfer record allows for designation of the inventory to be transferred and captures the information necessary to populate the transport manifest. Transport manifest records can be found associated to inventory transfers.

## PART TWO: High Level Workflow Diagrams

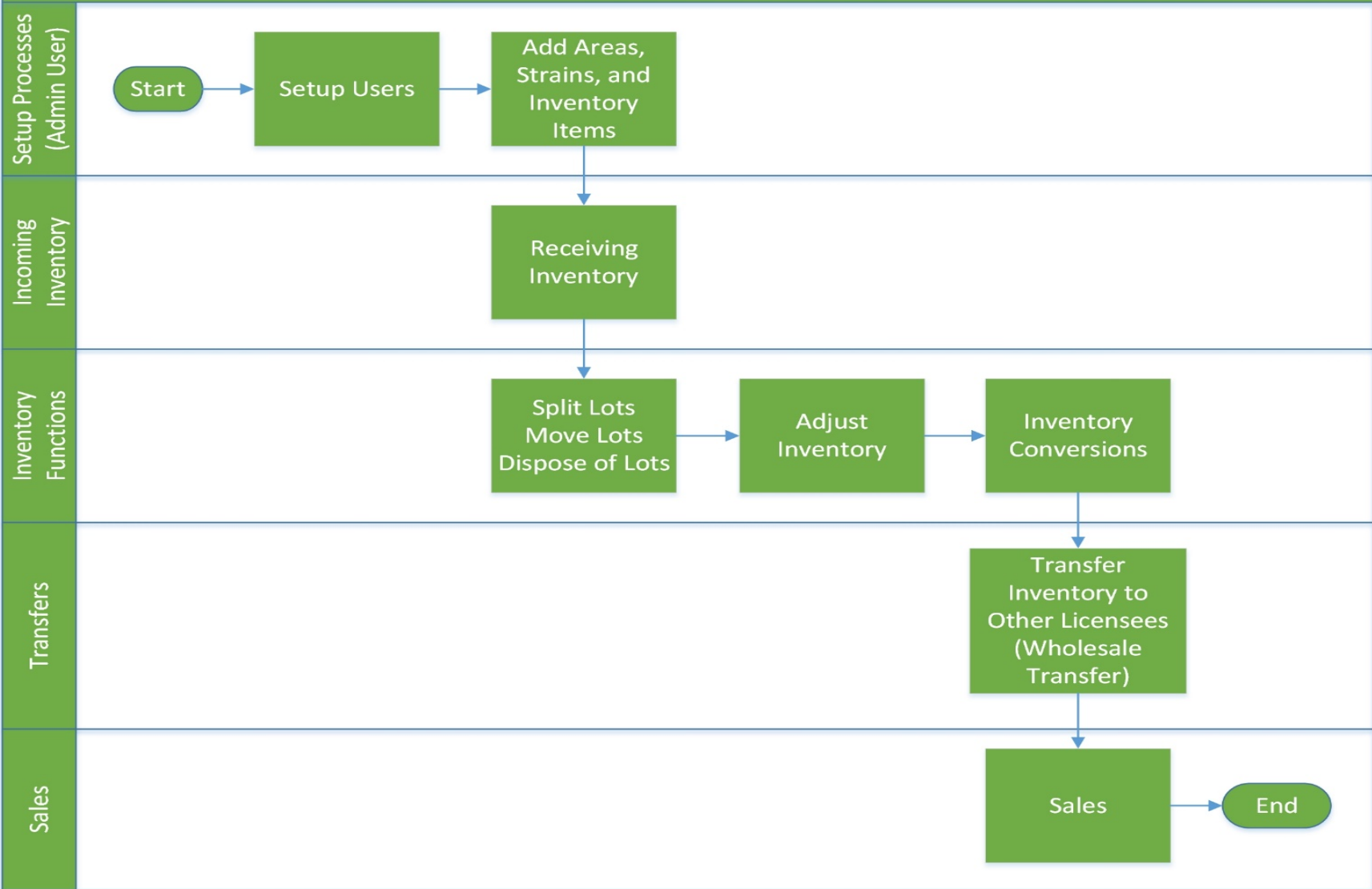
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Processing Facility Workflow (High Level Overview of System Functionality)



Retail Facility Workflow (High Level Overview of System Functionality)





## PART THREE: Manual Data Entry Procedures

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## Data Entry—User Interface: Procedures for Manual Data Entry at Production Facilities

### Administrative Setup

#### Assign User Authorization levels

1. Navigate to 'Users→View'.
2. Find the user to setup, and click the 'Modify' icon within the line item containing their name.
3. Verify their email address. If it is not correct, then enter the correct email address into the email field. *NOTE: Use individual email accounts for Leaf Data user profiles, since profile passwords can be reset and updated via email. Do not use shared business accounts for this purpose.*
4. Select the appropriate authorization level for the user. *NOTE: By default, all users aside from designated admin users at a facility are set to 'disabled' status until their permissions are assigned by the designated admin.*
  - a. Changing the authorization level to 'view' allows a user to see information present in Leaf Data without the ability to perform data functions.
  - b. Changing the authorization level to 'edit' allows a user to view information in Leaf Data, as well as perform functions pertaining to day-to-day operations of the facility. The administrative setup functions described in this procedure are NOT able to be performed by a user with an 'edit' authorization level.
  - c. Changing the authorization level to 'admin' allows a user access to all information and all functionality within Leaf Data that may be viewed or performed by the associated Licensee ID<sup>1</sup>.
5. Click the 'save' button to update the record.
6. Click the 'password reset' icon within the line item containing their name to notify a user of their access, and provide them with the URL for login.

#### Create Areas

1. Navigate to 'Data Entry→Areas'.
2. To create a new area, click the 'add' button in the upper-right corner of the screen.
3. Enter a name for the area, then select the corresponding area type. *NOTE: Area types that correspond to production facilities include veg, propagation, flower, storage, quarantine, and r&d.*
4. Click the 'save' button to create the area.
5. Repeat steps 2-4 until all physical locations where plants and product may exist are represented within Leaf Data.

#### Create Strains

1. Navigate to 'Data Entry→Strains'.
2. To create a new strain, click the 'add' button in the upper-right corner of the screen.
3. Enter the strain name in the name field, then click the 'save' button to create the strain.

<sup>1</sup> Note that—based on the internal design first implemented for Nevada—early releases of the WA Leaf implementation may still refer to licensees by the Nevada term: MME (i.e. Medical Marijuana Enterprise). This is being updated to reflect WA terminology.

4. Repeat steps 3-4 until all strains that will be present at the facility are represented within Leaf Data.

#### Create Inventory Items

1. Navigate to 'Data Entry→Inventory Items'. *NOTE: At producer facilities, inventory items are automatically created for any strains that are entered to house the resultant flower and trim from these plants. Inventory items for pre-packed weights must be added.*
2. Click the 'add' button in the upper-right corner of the screen.
3. In the 'Name' field, enter a name for the new inventory item, for example, the strain name followed by the pre-packaged weight amount.
4. Optionally, you may enter a description of the inventory item.
5. Fill out all other fields that correspond to the inventory item being created, leaving any fields blank that are not applicable to the item.
6. Once the form is complete, click the 'save' button to create the inventory item.

#### Adding Plants

1. Navigate to 'Data Entry→Batches' to create a batch that will house the plants being created.
2. Click the 'add' button in the upper-right corner of the screen.
3. From the 'Type' drop-down menu, select 'plant'.
4. From the 'Area' drop-down menu, select the physical location where the plants will be placed.
5. From the 'Source' drop-down menu, select 'inhouse'.
6. From the 'Origin' drop-down menu, select the origin from which the plants were propagated.
7. Do NOT enter a number into the 'Num Plants' field. The number of plants being created will be designated through the 'Plant Add' screen.
8. From the 'Strain' drop-down menu, select the strain of the plants being created. *NOTE: This process must be repeated for each strain of plants being created.*
9. From the 'Plant Stage' drop-down menu, select the current stage of the plants being created.
10. Click on the 'Planted Date' field to select the date that the plants within the batch were propagated.
11. (Optional) Click the 'Est Harvest Date' field to select the date that the plants within the batch are expected to be ready for harvest.
12. Click the 'save' button to create the new batch.
13. Navigate to 'Data Entry→Plants'.
14. Click the 'add' button in the upper-right corner of the screen.
15. In the 'Create Plants on Save' field, enter the number of plants being created within this batch.
16. From the 'Batch' drop-down menu, select the batch that was created in steps 2-13.
17. From the 'Stage' drop-down menu, select the current stage of the plants being created.
18. From the 'Area' drop-down menu, select the physical location where the plants will be placed.

19. From the 'Origin' drop-down menu, select the origin from which the plants were propagated.
20. Click on the 'Created Date' field to select the date that the plants within the batch were propagated.
21. *(Optional)* Click the 'Est Harvest Date' field to select the date that the plants within the batch are expected to be ready for harvest.
22. If the plants will be designated as mother plants at the facility, click the 'Is Mother' checkbox.
23. If the plants represent initial inventory for the facility, click the 'Initial Inventory' checkbox.
24. The 'Group Name', 'Additives', 'Pesticides', 'Nutrients', and 'Notes' fields are optional at this point, as this information may be added throughout the life cycle of the plants.
25. Click the 'save' button to create the plants.

### Living Plant Processes

Living plant processes can be performed to either individual plants or batches of plants. Instructions for both functions are present within the following 'Living Plant Processes' section.

#### *Advancing Stages*

1. Navigate to 'Data Entry→Batches' to advance the stage of a batch of plants or 'Data Entry→Plant' to advance the stage of a single plant.
2. Locate the batch/plant that must be advanced, and click the 'Modify' icon within the line item.
3. Update the stage using the 'Plant Stage'/'Stage' drop-down menu.
4. Click the 'save' button.

#### *Changing Areas*

1. Navigate to 'Data Entry→Batches' to advance the stage of a batch of plants or 'Data Entry→Plant' to advance the stage of a single plant.
2. Locate the batch/plant that must be shifted to a new location, and click the 'Modify' icon within the line item.
3. Update the area using the 'Area' drop-down menu.
4. Click the 'save' button.

#### *Destroying a Batch of Plants*

1. Navigate to 'Data Entry→Disposals'.
2. Click the 'add' button in the upper-right corner of the screen.
3. From the 'Source' drop-down menu, select 'Batch'.
4. From the 'Batch' drop-down menu, select the batch to be disposed of.
5. Click the 'Disposal Date' field to select the date that the batch of plants was destroyed.
6. From the 'Type' drop-down menu, select 'plant'.
7. From the 'Phase' drop-down menu, select 'cultivation'.
8. From the 'Reason' drop-down menu, select 'cull'.
9. *(Optional)* Enter the method by which the plants were disposed of.

10. Click the 'save' button to dispose of the batch of plants.

#### *Destroying a Single Plant*

1. Navigate to 'Data Entry→Plants'.
2. Within the line item of the plant to be disposed of, click the dispose icon

#### Harvest Process

Within the 'Harvest Process', a 'Wet Weight' is defined as the total wet weight of the plant(s) within a batch at the time of harvest. The 'Cure Weight' is defined as the total dry weight of the flower and trim produced from a batch prior to distribution. The waste weights may be entered repeatedly as waste is generated throughout the harvest process.

#### *Wet Weight*

1. Navigate to 'Data Entry→Batches'.
2. Within the line item of the batch to be harvested, click the 'Harvest' icon in the 'Action' column.
3. Enter the wet weight of the plants upon harvest into the 'Original Wet Weight' field.
4. Click the 'harvest lot' button.

#### *Cure Weight*

1. Navigate to 'Data Entry→Batches'.
2. Within the line item of the batch that the cure weight is being collected for, click the 'Cure' icon in the 'Action' column.
3. Enter the cured dry weight of the flower and trim into the 'Cured Batch Weight' field.
4. Click the 'cure lot' button.

#### *Waste Weight(s)*

1. Navigate to 'Data Entry→Batches'.
2. Within the line item of the batch that the waste weight is being documented for, click the 'Waste' icon in the 'Action' column.
3. Enter the waste weight into the 'Waste' field.
4. Click the 'save' button.

#### Creating Lots

1. Once all harvest weights (wet weight, cure weight, and waste weight) have been documented for a batch, navigate to 'Data Entry→Batches' to create lots of finished product.
2. Within the line item of the batch being packaged into lots, click the 'Finish' icon in the 'Action' column.
3. In the 'Additives' field, enter any nutrients, amendments, or other substances added to the plant throughout its life cycle.
4. Since 'Expiration Date' refers to perishable items, this field can be left blank when lots of flower or trim are being created.

5. From the 'New Lots' drop-down menu, select the inventory item (strain of flower) being packaged.
6. From the 'Type' drop-down menu, select either 'flower' or 'trim' to describe the packaged contents.
7. In the 'Qty' field, enter the weight of the lot being created, in grams.
8. To create multiple lots from the same batch, click the '+Add' link next to the 'New Lots' heading, and repeat steps 5-7 until all lots are represented.
9. Click the 'finish lot' button to create the packages.

### Inventory Functions

As product is packaged and prepared for sale, there are multiple functions that may be necessary to be performed. Once lots are created, they can be split into multiple lots, moved from area to area, and disposed of (either partially, or in full).

#### *Splitting Lots*

1. Navigate to 'Data Entry→Lots' and click the checkbox on the line item of the lot that must be split.
2. In the filter menu of the page, enter the gram weight of the new lot to be created into the 'Qty' field (adjacent to the 'split selected lot' button).
3. Click the 'split selected lot' button.
4. The designated quantity will be shifted into its own lot, and the original lot will contain the remaining weight.

#### *Moving Lots*

1. Navigate to 'Data Entry→Lots' and click the checkbox on the line item of the lot that is being moved to a new physical location.
2. In the filter menu of the page, select the new area for the lot from the 'Move to Area' drop-down menu (adjacent to the 'move selected lots' button).
3. Click the 'move selected lots' button.
4. The designated lot will be shifted into the new area that has been selected.

#### *Disposals*

1. Navigate to 'Data Entry→Lots'.
2. Within the line item of the lots that is being adjusted due to a disposal, click the 'Dispose' icon at the far-right side of the record.
3. Click the 'Disposal Date' field to enter the date when the waste was created.
4. From the 'Type' drop-down menu, select either 'flowers' or 'trim' based on the type of product being disposed of.
5. In the 'Qty' field, enter the weight of the product that is being disposed of.
6. From the 'UOM' drop-down menu, select the unit of measure that corresponds to the weight entered in the previous step.
7. From the 'Phase' drop-down menu, select 'harvest'.
8. From the 'Reason' drop-down menu, select the reason that is most appropriate for the disposal being created.

9. In the 'Method' field, type in the method by which the product will be disposed (i.e. "Green Waste Disposal Service", "Onsite Composting", etc).
10. Click the 'save' button to create the new disposal.

### Inventory Adjustments

1. Navigate to 'Data Entry→Inventory Adjustments'.
2. Click the 'add' button in the upper-right corner of the screen to create a new adjustment.
3. From the 'Lot' drop-down menu, select the lot that is to be adjusted.
4. In the 'Qty' field, enter the weight being adjusted from the package (and NOT the new package weight). For example, if 100 grams is being added to the lot, type "100", however, if 100 grams is being decremented from the lot, type "-100".
5. From the 'Reason' drop-down menu, select the reason that the adjustment is being documented.
6. From the 'Adjusted By' drop-down menu, select the individual who is performing the adjustment.
7. Click in the 'Adjusted Date' field to select the date that the adjustment was performed. Edit the resultant time that appears, as appropriate.
8. *(Optional)* In the memo field, add any additional notes that better explain the reason for the adjustment.
9. Click the 'save' button.

### Inventory Conversions (changing Bulk Flower into Pre-packaged Flower)

1. Navigate to 'Data Entry→Conversion'.
2. Click the '+add' link next to the 'Inputs' heading.
3. From the drop-down menu that appears, select the lot of inventory to be converted from bulk flower into pre-packaged flower.
4. In the adjacent 'Qty' field, enter the amount from the original bulk lot that is being converted.
5. Under the 'Create New Batch' section, from the 'Inventory Type' drop-down menu, select the target inventory item. NOTE: For pre-packaged flower, inventory items for each pricing weight of each strain must be created prior to performing the conversion process.
6. From the 'Area' drop-down menu, select the physical location where the new lots will be stored.
7. In the 'Qty' field, enter the number of pre-packs of the selected pricing weight being created.
8. From the 'UOM' drop-down menu, select 'ea' to create pre-packaged simple inventory.
9. Since 'Expiration Date' refers to perishable items, this field can be left blank when lots of flower or trim are being created.
10. In the 'Additives' field, enter any nutrients, amendments, or other substances added to the plant throughout its life cycle.
11. Click the 'save' button to perform the conversion.

### Transferring Samples to Testing Lab

1. Navigate to 'Data Entry→Lots'.
2. Click the checkbox within the line item of the lot being sent for testing.
3. Click the 'transfer to labs' button located beneath the filtering options at the top of the screen.
4. From the 'To licensee' drop-down menu, select the lab that the sample is being transferred to.
5. From the 'To User' drop-down menu, select the individual at the corresponding lab who is accepting chain of custody for the sample.
6. From the 'Transporter' drop-down menu, select the individual creating the transfer.
7. Click the 'Est Departure' field to enter the date that the transfer of the sample is expected to occur.
8. Click the 'Est Arrival Date' field to enter the date that the transfer of the sample is expected to arrive at the lab facility.
9. Click the 'Transferred Date' field to enter the date that the transfer is actually being sent from the facility.
10. In the 'Stops', 'Vehicle Description', 'License Plate', 'Route', and 'Notes' fields, enter the corresponding information relevant to the transfer of the sample for population into the transportation manifest.
11. From the 'Type' drop-down menu, select 'inventory'.
12. From the 'Lot' drop-down menu, ensure that the intended lot (originally selected from the 'Data Entry→Lots' screen) is correct.
13. In the 'Qty' field, enter the weight of the sample being transferred (in grams).
14. The 'Is Sample' checkbox should remain selected, as it is selected by default for transfers to labs.
15. To add additional samples to the same transportation manifest, click the '+Add' link next to the 'Lot' heading.
16. From the 'Lot' drop-down menu, select the additional lot from which a sample is being transferred to the lab.
17. Repeat steps 13-15 until all samples being sent to the lab are represented within the form.
18. Click the 'save' button.
19. The samples have now been transferred for receipt at the designated lab within Leaf, and the corresponding lots will show a status of 'Quarantined' until the lab enters passing test results for the samples.

### Transferring Inventory to Other Licensees

1. Navigate to 'Data Entry→Inventory Transfers'.
2. Click the 'add' button in the upper-right corner of the screen to create a new transfer.
3. From the 'To Licensee' drop-down menu, select the licensee that the transfer is being sent to.
4. From the 'To User' drop-down menu, select the individual at the corresponding facility who is accepting chain of custody for the transfer.
5. From the 'Transporter' drop-down menu, select the individual transporting the transfer.
6. Click the 'Est Departure' field to enter the date that the transfer is expected to occur.
7. Click the 'Est Arrival Date' field to enter the date that the transfer is expected to arrive at the receiving facility.



8. Click the 'Transferred Date' field to enter the date that the transfer is sent from the facility.
9. In the 'Stops', 'Vehicle Description', 'License Plate', 'Route', and 'Notes' fields, enter the corresponding information relevant to the transfer for population into the transportation manifest.
10. From the 'Type' drop-down menu, select 'inventory'.
11. From the 'Lot' drop-down menu, select the inventory lot being transferred.
12. In the 'Qty' field, enter the weight of the lot being transferred (in grams).
13. The 'Is Sample' checkbox should remain unselected, as it is only utilized for transfers to labs.
14. To add additional lots to the same transportation manifest, click the '+Add' link next to the 'Lot' heading.
15. Repeat steps 11-13 until all samples being sent to the lab are represented within the form.
16. Click the 'save' button to create the transfer.

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## Data Entry—User Interface: Procedures for Manual Data Entry at Processing Facilities

### Admin Setup

#### Assign User Authorization levels

1. Navigate to 'Users→View'.
2. Find the user to setup, and click the 'Modify' icon within the line item containing their name.
3. Verify their email address. If it is not correct, then enter the correct email address into the email field. *NOTE: Use personal email accounts for Leaf Data user profiles, since profile passwords can be reset and updated via email. Do not use shared business accounts for this purpose.*
4. Select the appropriate authorization level for the user. *NOTE: By default, all users aside from designated admin users at a facility are set to 'disabled' status until their permissions are assigned by the designated admin.*
  - a. Changing the authorization level to 'view' allows a user to see information present in Leaf Data without the ability to perform data functions.
  - b. Changing the authorization level to 'edit' allows a user to view information in Leaf Data, as well as perform functions pertaining to day-to-day operations of the facility. The administrative setup functions described in this procedure are NOT able to be performed by a user with an 'edit' authorization level.
  - c. Changing the authorization level to 'admin' allows a user access to all information and all functionality within Leaf Data that may be viewed or performed by the associated Licensee ID.
5. Click the 'save' button to update the record.
6. Click the 'password reset' icon within the line item containing their name to notify a user of their access, and provide them with the URL for login.

#### Create Areas

1. Navigate to 'Data Entry→Areas'.
2. To create a new area, click the 'add' button in the upper-right corner of the screen.
3. Enter a name for the area, then select the corresponding area type. *NOTE: Area types that correspond to processing facilities include storage, quarantine, and r&d.*
4. Click the 'save' button to create the area.
5. Repeat steps 2-4 until all physical locations where plants and product may exist are represented within Leaf Data.

#### Create Strains

1. Navigate to 'Data Entry→Strains'.
2. To create a new strain, click the 'add' button in the upper-right corner of the screen.
3. Enter the strain name in the name field, then click the 'save' button to create the strain.
4. Repeat steps 3-4 until all strains that will be present at the facility are represented within Leaf Data.

#### Create Inventory Items

1. Navigate to 'Data Entry→Inventory Items'.

2. Click the 'add' button in the upper-right corner of the screen.
3. In the 'Name' field, enter a name for the new inventory item, for example, the specific type of concentrate/infused product being produced.
4. Optionally, you may enter a description of the inventory item.
5. Fill out all other fields that correspond to the inventory item being created, leaving any fields blank that are not applicable to the item.
6. Once the form is complete, click the 'save' button to create the inventory item.

### Receiving Inventory Transfers from Other Sources

1. Navigate to 'Reports→Inventory Transfers-Receive'.
2. Within the line item of the transfer to be received, click the gear icon in the 'Receive' column.
3. Verify the weight of each lot of inventory being received, and log appropriate adjustments into the 'Qty Received' field that corresponds to each lot.
4. Click the 'save' button to update the appropriate inventory records and accept the lots into the facility.

### Inventory Functions

As product is packaged and prepared for sale, there are multiple functions that may be necessary to be performed. Once lots are created, they can be split into multiple lots, moved from area to area, and disposed of (either partially, or in full).

#### *Splitting Lots*

1. Navigate to 'Data Entry→Lots' and click the checkbox on the line item of the lot that must be split.
2. In the filter menu of the page, enter the gram weight of the new lot to be created into the 'Qty' field (adjacent to the 'split selected lot' button).
3. Click the 'split selected lot' button.
4. The designated quantity will be shifted into its own lot, and the original lot will contain the remaining weight.

#### *Moving Lots*

1. Navigate to 'Data Entry→Lots' and click the checkbox on the line item of the lot that is being moved to a new physical location.
2. In the filter menu of the page, select the new area for the lot from the 'Move to Area' drop-down menu (adjacent to the 'move selected lots' button).
3. Click the 'move selected lots' button.
4. The designated lot will be shifted into the new area that has been selected.

#### *Disposals*

1. Navigate to 'Data Entry→Lots'.

2. Within the line item of the lots that is being adjusted due to a disposal, click the 'Dispose' icon at the far-right side of the record.
3. Click the 'Disposal Date' field to enter the date when the waste was created.
4. From the 'Type' drop-down menu, select either the type of product being disposed of.
5. In the 'Qty' field, enter the weight/quantity of the product that is being disposed of.
6. From the 'UOM' drop-down menu, select the unit of measure that corresponds to the weight/quantity entered in the previous step.
7. From the 'Phase' drop-down menu, select 'harvest'.
8. From the 'Reason' drop-down menu, select the reason that is most appropriate for the disposal being created.
9. In the 'Method' field, type in the method by which the product will be disposed (i.e. "Green Waste Disposal Service", "Onsite Composting", etc).
10. Click the 'save' button to create the new disposal.

### Inventory Adjustments

1. Navigate to 'Data Entry→Inventory Adjustments'.
2. Click the 'add' button in the upper-right corner of the screen to create a new adjustment.
3. From the 'Lot' drop-down menu, select the lot that is to be adjusted.
4. In the 'Qty' field, enter the weight being adjusted from the package (and NOT the new package weight). For example, if 100 grams is being added to the lot, type "100", however, if 100 grams is being decremented from the lot, type "-100".
5. From the 'Reason' drop-down menu, select the reason that the adjustment is being documented.
6. From the 'Adjusted By' drop-down menu, select the individual who is performing the adjustment.
7. Click in the 'Adjusted Date' field to select the date that the adjustment was performed. Edit the resultant time that appears, as appropriate.
8. *(Optional)* In the memo field, add any additional notes that better explain the reason for the adjustment.
9. Click the 'save' button.

### Inventory Conversions

1. Navigate to 'Data Entry→Conversion'.
2. Click the '+add' link next to the 'Inputs' heading.
3. From the drop-down menu that appears, select the lot(s) of inventory that represents the conversion "input".
4. In the adjacent 'Qty' field, enter the amount from the original lot that is being converted.

5. Under the 'Create New Batch' section, from the 'Inventory Type' drop-down menu, select the target inventory item. *NOTE: For conversions to pre-packaged items that are priced-by-weight, inventory items for each pricing weight of each strain must be created prior to performing the conversion process.*
6. From the 'Area' drop-down menu, select the physical location where the new lots will be stored.
7. In the 'Qty' field, enter the weight/quantity of the "output" product being created.
8. From the 'UOM' drop-down menu, select 'ea' to create pre-packaged simple inventory.
9. Since 'Expiration Date' refers to perishable items, this field can be left blank if a non-perishable item is being created.
10. In the 'Additives' field, enter any nutrients, amendments, or other substances added to the resultant product.
11. Click the 'save' button to perform the conversion.

### Transferring Samples to Testing Lab

1. Navigate to 'Data Entry→Lots'.
2. Click the checkbox within the line item of the lot being sent for testing.
3. Click the 'transfer to labs' button located beneath the filtering options at the top of the screen.
4. From the 'To Licensee' drop-down menu, select the lab that the sample is being transferred to.
5. From the 'To User' drop-down menu, select the individual at the corresponding lab who is accepting chain of custody for the sample.
6. From the 'Transporter' drop-down menu, select the individual creating the transfer.
7. Click the 'Est Departure' field to enter the date that the transfer of the sample is expected to occur.
8. Click the 'Est Arrival Date' field to enter the date that the transfer of the sample is expected to arrive at the lab facility.
9. Click the 'Transferred Date' field to enter the date that the transfer is actually being sent from the facility.
10. In the 'Stops', 'Vehicle Description', 'License Plate', 'Route', and 'Notes' fields, enter the corresponding information relevant to the transfer of the sample for population into the transportation manifest.
11. From the 'Type' drop-down menu, select 'inventory'.
12. From the 'Lot' drop-down menu, ensure that the intended lot (originally selected from the 'Data Entry→Lots' screen) is correct.
13. In the 'Qty' field, enter the weight of the sample being transferred (in grams).
14. The 'Is Sample' checkbox should remain selected, as it is selected by default for transfers to labs.
15. To add additional samples to the same transportation manifest, click the '+Add' link next to the 'Lot' heading.
16. From the 'Lot' drop-down menu, select the additional lot from which a sample is being transferred to the lab.
17. Repeat steps 13-15 until all samples being sent to the lab are represented within the form.
18. Click the 'save' button.
19. The samples have now been transferred for receipt at the designated lab within Leaf, and the corresponding lots will show a status of 'Quarantined' until the lab enters passing test results for the samples.

### Transferring Inventory to Other Licensees

1. Navigate to 'Data Entry→Inventory Transfers'.
2. Click the 'add' button in the upper-right corner of the screen to create a new transfer.
3. From the 'To Licensee' drop-down menu, select the licensee that the transfer is being sent to.
4. From the 'To User' drop-down menu, select the individual at the corresponding facility who is accepting chain of custody for the transfer.
5. From the 'Transporter' drop-down menu, select the individual transporting the transfer.
6. Click the 'Est Departure' field to enter the date that the transfer is expected to occur.
7. Click the 'Est Arrival Date' field to enter the date that the transfer is expected to arrive at the receiving facility.
8. Click the 'Transferred Date' field to enter the date that the transfer is sent from the facility.
9. In the 'Stops', 'Vehicle Description', 'License Plate', 'Route', and 'Notes' fields, enter the corresponding information relevant to the transfer for population into the transportation manifest.
10. From the 'Type' drop-down menu, select 'inventory'.
11. From the 'Lot' drop-down menu, select the inventory lot being transferred.
12. In the 'Qty' field, enter the weight of the lot being transferred (in grams).
13. The 'Is Sample' checkbox should remain unselected, as it is only utilized for transfers to labs.
14. To add additional lots to the same transportation manifest, click the '+Add' link next to the 'Lot' heading.
15. Repeat steps 11-13 until all samples being sent to the lab are represented within the form.
16. Click the 'save' button to create the transfer.

## Data Entry—User Interface: Procedures for Manual Data Entry at Retail Facilities

### Admin Setup

#### Assign User Authorization levels

1. Navigate to 'Users→View'.
2. Find the user to setup, and click the 'Modify' icon within the line item containing their name.
3. Verify their email address. If it is not correct, then enter the correct email address into the email field. *NOTE: Use personal email accounts for Leaf Data user profiles, since profile passwords can be reset and updated via email. Do not use shared business accounts for this purpose.*
4. Select the appropriate authorization level for the user. *NOTE: By default, all users aside from designated admin users at a facility are set to 'disabled' status until their permissions are assigned by the designated admin.*
  - a. Changing the authorization level to 'view' allows a user to see information present in Leaf Data without the ability to perform data functions.
  - b. Changing the authorization level to 'edit' allows a user to view information in Leaf Data, as well as perform functions pertaining to day-to-day operations of the facility. The administrative setup functions described in this procedure are NOT able to be performed by a user with an 'edit' authorization level.
  - c. Changing the authorization level to 'admin' allows a user access to all information and all functionality within Leaf Data that may be viewed or performed by the associated Licensee ID.
5. Click the 'save' button to update the record.
6. Click the 'password reset' icon within the line item containing their name to notify a user of their access, and provide them with the URL for login.

#### Create Areas

1. Navigate to 'Data Entry→Areas'.
2. To create a new area, click the 'add' button in the upper-right corner of the screen.
3. Enter a name for the area, then select the corresponding area type. *NOTE: Area types that correspond to processing facilities include storage, quarantine, and r&d.*
4. Click the 'save' button to create the area.
5. Repeat steps 2-4 until all physical locations where plants and product may exist are represented within Leaf Data.

#### Create Strains

1. Navigate to 'Data Entry→Strains'.
2. To create a new strain, click the 'add' button in the upper-right corner of the screen.
3. Enter the strain name in the name field, then click the 'save' button to create the strain.
4. Repeat steps 3-4 until all strains that will be present at the facility are represented within Leaf Data.

#### Create Inventory Items

1. Navigate to 'Data Entry→Inventory Items'.

2. Click the 'add' button in the upper-right corner of the screen.
3. In the 'Name' field, enter a name for the new inventory item, for example, the specific type of concentrate/infused product being produced.
4. Optionally, you may enter a description of the inventory item.
5. Fill out all other fields that correspond to the inventory item being created, leaving any fields blank that are not applicable to the item.
6. Once the form is complete, click the 'save' button to create the inventory item.

### Receiving Inventory Transfers from Other Licensees

1. Navigate to 'Reports→Inventory Transfers-Receive'.
2. Within the line item of the transfer to be received, click the gear icon in the 'Receive' column.
3. Verify the weight of each lot of inventory being received, and log appropriate adjustments into the 'Qty Received' field that corresponds to each lot.
4. Click the 'save' button to update the appropriate inventory records and accept the lots into the facility.

### Inventory Acquisition (Other Sources)

1. Navigate to 'Data Entry→Acquisitions-Lots'.
2. In the 'Customer Number' field, enter the customer number of the cardholder from whom the inventory is being acquired.
3. From the 'Type' drop-down menu, select the inventory item being received.
4. In the 'Qty Received' field, enter the weight (in grams) of the inventory lot.
5. Click the 'receive' button to add the new lot into inventory.

### Inventory Functions

As product is packaged and prepared for sale, there are multiple functions that may be necessary to be performed. Once lots are created, they can be split into multiple lots, moved from area to area, and disposed of (either partially, or in full).

#### *Splitting Lots*

1. Navigate to 'Data Entry→Lots' and click the checkbox on the line item of the lot that must be split.
2. In the filter menu of the page, enter the gram weight of the new lot to be created into the 'Qty' field (adjacent to the 'split selected lot' button).
3. Click the 'split selected lot' button.
4. The designated quantity will be shifted into its own lot, and the original lot will contain the remaining weight.



### Moving Lots

1. Navigate to 'Data Entry→Lots' and click the checkbox on the line item of the lot that is being moved to a new physical location.
2. In the filter menu of the page, select the new area for the lot from the 'Move to Area' drop-down menu (adjacent to the 'move selected lots' button).
3. Click the 'move selected lots' button.
4. The designated lot will be shifted into the new area that has been selected.

### Disposals

1. Navigate to 'Data Entry→Lots'.
2. Within the line item of the lots that is being adjusted due to a disposal, click the 'Dispose' icon at the far-right side of the record.
3. Click the 'Disposal Date' field to enter the date when the waste was created.
4. From the 'Type' drop-down menu, select either the type of product being disposed of.
5. In the 'Qty' field, enter the weight/quantity of the product that is being disposed of.
6. From the 'UOM' drop-down menu, select the unit of measure that corresponds to the weight/quantity entered in the previous step.
7. From the 'Phase' drop-down menu, select 'harvest'.
8. From the 'Reason' drop-down menu, select the reason that is most appropriate for the disposal being created.
9. In the 'Method' field, type in the method by which the product will be disposed (i.e. "Green Waste Disposal Service", "Onsite Composting", etc).
10. Click the 'save' button to create the new disposal.

### Inventory Adjustments

1. Navigate to 'Data Entry→Inventory Adjustments'.
2. Click the 'add' button in the upper-right corner of the screen to create a new adjustment.
3. From the 'Lot' drop-down menu, select the lot that is to be adjusted.
4. In the 'Qty' field, enter the weight being adjusted from the package (and NOT the new package weight). For example, if 100 grams is being added to the lot, type "100", however, if 100 grams is being decremented from the lot, type "-100".
5. From the 'Reason' drop-down menu, select the reason that the adjustment is being documented.
6. From the 'Adjusted By' drop-down menu, select the individual who is performing the adjustment.
7. Click in the 'Adjusted Date' field to select the date that the adjustment was performed. Edit the resultant time that appears, as appropriate.
8. *(Optional)* In the memo field, add any additional notes that better explain the reason for the adjustment.
9. Click the 'save' button.

### Inventory Conversions

1. Navigate to 'Data Entry→Conversion'.
2. Click the '+add' link next to the 'Inputs' heading.
3. From the drop-down menu that appears, select the lot(s) of inventory that represents the conversion "input".
4. In the adjacent 'Qty' field, enter the amount from the original lot that is being converted.
5. Under the 'Create New Batch' section, from the 'Inventory Type' drop-down menu, select the target inventory item. *NOTE: For conversions to pre-packaged items that are priced-by-weight, inventory items for each pricing weight of each strain must be created prior to performing the conversion process.*
6. From the 'Area' drop-down menu, select the physical location where the new lots will be stored.
7. In the 'Qty' field, enter the weight/quantity of the "output" product being created.
8. From the 'UOM' drop-down menu, select 'ea' to create pre-packaged simple inventory.
9. Since 'Expiration Date' refers to perishable items, this field can be left blank if a non-perishable item is being created.
10. In the 'Additives' field, enter any nutrients, amendments, or other substances added to the resultant product.
11. Click the 'save' button to perform the conversion.

### Transferring Inventory to Other Licensees

1. Navigate to 'Data Entry→Inventory Transfers'.
2. Click the 'add' button in the upper-right corner of the screen to create a new transfer.
3. From the 'To Licensee' drop-down menu, select the licensee that the transfer is being sent to.
4. From the 'To User' drop-down menu, select the individual at the corresponding facility who is accepting chain of custody for the transfer.
5. From the 'Transporter' drop-down menu, select the individual transporting the transfer.
6. Click the 'Est Departure' field to enter the date that the transfer is expected to occur.
7. Click the 'Est Arrival Date' field to enter the date that the transfer is expected to arrive at the receiving facility.
8. Click the 'Transferred Date' field to enter the date that the transfer is sent from the facility.
9. In the 'Stops', 'Vehicle Description', 'License Plate', 'Route', and 'Notes' fields, enter the corresponding information relevant to the transfer for population into the transportation manifest.
10. From the 'Type' drop-down menu, select 'inventory'.
11. From the 'Lot' drop-down menu, select the inventory lot being transferred.
12. In the 'Qty' field, enter the weight of the lot being transferred (in grams).
13. The 'Is Sample' checkbox should remain unselected, as it is only utilized for transfers to labs.
14. To add additional lots to the same transportation manifest, click the '+Add' link next to the 'Lot' heading.
15. Repeat steps 11-13 until all samples being sent to the lab are represented within the form.

16. Click the 'save' button to create the transfer.

### Sales

1. Navigate to 'Data Entry→Sales'.
2. Click the 'Add' button in the upper-right corner of the screen.
3. From the 'Area' drop-down menu, select the area from which the inventory was sold.
4. From the 'Status' drop-down menu, select 'sale', 'return', or 'void', as appropriate for the transaction being entered.
5. Click the 'Sold Date' field, and enter the date that the sale took place.
6. From the 'Lot' drop-down menu, select the lot that the product sold came from.
7. In the 'Qty' field, enter the amount of the selected lot that was sold.
8. In the 'Discount' field, enter any discount (in dollars) applied to the sale.
9. To add additional items, click the '+Add' link adjacent to the 'Lot' drop-down menu and repeat steps 6-8.
10. Click the 'save' button to create the sale records.

## PART FOUR: Reporting Matrices

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## Production Facility Reports

*Relating to Data Captured Throughout Each Process*

<b>PROCESS</b>	<b>CORRESPONDING REPORT(S) AND DATA RETRIEVAL</b>
Admin Setup	Users→View Reports→Authorized Agents Data Entry→Areas Data Entry→Strains Data Entry→Inventory Items
Plant Acquisition (Other Sources)	Data Entry→Acquisitions-Plants History→Other Sources Acquisitions History
Inventory Acquisition (Other Sources)	Data Entry→Acquisitions-Lots History→Other Sources Acquisitions History
Adding Plants	Data Entry→Plants Data Entry→Batches Reports→Plants Reports→Batches History→Plant History History→Batch Log Entries History
Living Plant Processes	Data Entry→Plants Data Entry→Batches Reports→Plants Reports→Batches History→Plant History History→Batch Log Entries History History→Plant Area Changes History
Harvest Process	Data Entry→Batches Reports→Batches Reports→Harvests History→Batch Log Entries History
Creating Lots	Data Entry→Batches Data Entry→Lots Reports→Batches Reports→Inventory Lots Report
Inventory Functions (splitting lots, moving lots, disposals)	Data Entry→Lots Data Entry→Disposals Reports→Inventory Lots Report

	Reports→Disposals History→Inventory Area Changes History
Inventory Adjustments	Data Entry→Inventory Adjustments Reports→Inventory Lots Report History→Inventory Adjustments History
Inventory Conversions	Data Entry→Conversion Reports→Inventory Lots Report
Transferring Samples to Testing Labs	Data Entry→Inventory Transfers Reports→Samples Reports→Inventory Transfers/Manifests Reports→Transfer Discrepancies Reports→Lab Results
Transferring Inventory to Other Licensees	Data Entry→Inventory Transfers Reports→Inventory Transfers/Manifests Reports→Transfer Discrepancies

## Processing Facility Reports

*Relating to Data Captured Throughout Each Process*

<b>PROCESS</b>	<b>CORRESPONDING REPORT(S) AND DATA RETRIEVAL</b>
Admin Setup	Users→View Reports→Authorized Agents Data Entry→Areas Data Entry→Strains Data Entry→Inventory Items
Inventory Acquisition (Other Sources)	Data Entry→Acquisitions-Lots History→Other Sources Acquisitions History
Receiving Inventory from Other Sources	Data Entry→Inventory Transfers Reports→Inventory Transfers/Receive Reports→Inventory Lots Report Reports→Transfer Discrepancies
Inventory Functions (splitting lots, moving lots, disposals)	Data Entry→Lots Data Entry→Disposals Reports→Inventory Lots Report Reports→Disposals History→Inventory Area Changes History
Inventory Adjustments	Data Entry→Inventory Adjustments Reports→Inventory Lots Report History→Inventory Adjustments History
Inventory Conversions	Data Entry→Conversion Reports→Inventory Lots Report
Transferring Samples to Testing Labs	Data Entry→Inventory Transfers Reports→Samples Reports→Inventory Transfers/Manifests Reports→Transfer Discrepancies Reports→Lab Results
Transferring Inventory to Other Licensees	Data Entry→Inventory Transfers Reports→Inventory Transfers/Manifests Reports→Transfer Discrepancies

## Retail Facility Reports

*Relating to Data Captured Throughout Each Process*

<b>PROCESS</b>	<b>CORRESPONDING REPORT(S) AND DATA RETRIEVAL</b>
Admin Setup	Users→View Reports→Authorized Agents Data Entry→Areas Data Entry→Strains Data Entry→Inventory Items
Inventory Acquisition (Other Sources)	Data Entry→Acquisitions-Lots History→Other Sources Acquisitions History
Receiving Inventory from Other Sources	Data Entry→Inventory Transfers Reports→Inventory Transfers/Receive Reports→Inventory Lots Report Reports→Transfer Discrepancies
Inventory Functions (splitting lots, moving lots, disposals)	Data Entry→Lots Data Entry→Disposals Reports→Inventory Lots Report Reports→Disposals History→Inventory Area Changes History
Inventory Adjustments	Data Entry→Inventory Adjustments Reports→Inventory Lots Report History→Inventory Adjustments History
Inventory Conversions	Data Entry→Conversion Reports→Inventory Lots Report
Transferring Inventory to Other Licensees	Data Entry→Inventory Transfers Reports→Inventory Transfers/Manifests Reports→Transfer Discrepancies
Purchasers	Data Entry→Purchasers
Sales	Data Entry→Sales Reports→Sales Summary Reports→Tax Summary History→Summary by Day History