Leaf Data Systems
State of Washington
1.37.5 Release Changes for Producer/Processor Licensees

RELEASE HIGHLIGHTS:

1.37.5 WORKFLOW IMPROVEMENTS AND ISSUE RESOLUTION:
- Waste Reporting:
  - Added workflow for reporting "Daily Plant Waste"
  - Refined ability to report waste during harvest-related workflows:
    - Harvest Batch
    - Cure Batch
    - Finish Batch
  - Resolved issues related to waste reporting when performing Conversions
- Inventory Type Attributes:
  - Added ability to capture 'Weight per unit' for weight-based discrete items
  - Added ability to capture 'Serving Size' for infused discrete items
  - Added ability to capture 'Servings per Unit' for infused discrete items
- Lab Results:
  - Refined business logic surrounding lab results requirements
  - Resolved threshold and validation issues with individual lab tests
  - *NOTE: While there are no direct workflow changes for Producer/Processor licensees involving lab results, the improved logic and validation for lab results will indirectly improve reporting for lab results in Leaf Data Systems for all License Types*
- Inventory Transfers:
  - Refined data validation in order to minimize ability for invalid data entry
- Sales:
  - Added ability to adjust previously entered sales data (unit price)

1.37.5 GENERAL IMPROVEMENTS:

- Numeric Standardization:
  - o Decimal values pertaining to weights are all now to two decimal places
- Drop-down Menus:
  - o Traditional drop-down menus replaced with "type-ahead" search fields
    - ▪ Batches
    - ▪ Inventories
    - ▪ Inventory Types

SUMMARY OF CHANGES:

Following is a list of the items being released with 1.37.5.

Terminology Used in Table Below

Issue/Solution	*denotes an instance where the system was not functioning as designed, and the corresponding solution to resolve the issue*
Workflow Gap/ Improved Workflow	*describes a situation where licensees/integrators have used a procedural system workaround to accomplish a workflow that they perform along with the corresponding solution implemented to address the gap*
Update	*new/improved/enhanced functionality that represents new requirements implemented*

	Summary of Work	Extended Description of Solution Implemented
BATCHES	**Batches/Add:** creation of 'type'='plant' populates 'harvest_stage' and 'harvested_at'	**Issue:** When creating a plant batch, the 'harvest_stage' and 'harvested_at' fields are automatically populated. **Solution:** The 'harvest_stage' and 'harvested_at' fields will no longer be populated automatically upon creation of a plant batch.
	Batches/Cure: add ability to report waste during cure	**Workflow Gap:** When curing a batch of harvested material, user is unable to associate waste with this process. **Improved Workflow:** During the "cure batch" and "finish batch" functions, waste can be reported that will be associated with the harvest batch. This will cause the creation of a destruction record as well as the related inventory lot record representing the waste.
	Batches/Delete: block ability if active plants/inventory associated	**Workflow Gap:** Batches with associated plants and inventory can be deleted, which corrupts the associated records. **Improved Workflow:** Batches that have plants or inventory (active or inactive) associated with them cannot be deleted. Attempting to delete a batch that is in use will cause the request to fail, and an error message to be returned.
	Batches/Finish: inventory lot creation validation	**Workflow Gap:** Harvest batches being finished into inventory can be changed into "flower" or "other material". **Improved Workflow:** When finishing harvest batches into inventory, user must select the 'material_type' that they are creating, which results in the system validating which inventory types are appropriate based on this data.
	Batches/Finish: waste creation workflow	**Workflow Gap:** When finishing a batch of harvested material, user is unable to associate waste with this process. **Improved Workflow:** During the "cure batch" and "finish batch" functions, waste can be reported that will be associated with the harvest batch. This will cause the creation of a destruction record as well as the related inventory lot record representing the waste.

	Summary of Work	Extended Description of Solution Implemented
	Batches/Harvest: dry weights can be higher than wet weights	**Issue:** When creating a harvest batch, the dry weights entered are able to be greater than the wet weights previously entered for the batch. **Solution:** Data validation has been added to ensure that dry weights exceeding the original wet weight cannot be entered.
	Batches/Harvest: only integer values are saved	**Issue:** Upon creating a harvest batch, the system does not save decimal values for weights. **Solution:** When creating a harvest batch, users can enter values for weights with up to two decimal places.
	Batches/Harvest: remove ability to modify batch	**Update:** Users will no longer be able to modify batch information for harvest type batches and must follow appropriate batch workflows to log information changes.
	Batches/Listing: 'num_plants' shows plants with 'transferred' and 'inventory' stage.	**Issue:** Upon retrieving the information associated with a batch, the number of plants includes plants that have been transferred or moved to inventory. **Solution:** The number of plants associated with a batch has been corrected to exclude plants that have been transferred to inventory.
	Batches/Plants/Inventories: add 'type-ahead' search field	**Issue:** Within the user interface, drop-down menus with large amounts of data are truncated to 50 records. **Solution:** Drop-down menus for retrieval of batches, plants, inventories, and inventory types have been changed to type-ahead search fields, where the drop-down populates filtered to the values entered.
	Batches: 'qty_cure' & 'dry_weight' values have different datatype lengths	**Update:** Numeric standardization throughout the system will provide consistencies with decimal values entered. With the exception of lab results, all decimal values will be saved to two places past the decimal. Lab Results will be saved to three places past the decimal.
	Batches: waste/destruction creation process [Producer, Producer/Processor Users]	**Update:** The workflows regarding waste creation for harvest processes and conversions are being reworked to align with the workflows.
CONVERSIONS	**Conversions/Add:** associate 'waste' with conversion output	**Issue:** Waste created through a conversion is associated with the input lots, causing the creation of extraneous waste lots. **Solution:** Waste created through a conversion is associated with the output lot. Upon entering a waste value when performing a conversion, a destruction record and associated waste inventory lot are created automatically.
	Conversions/Add: waste batch/inventory type relationship	**Issue:** Waste created through a conversion should be associated with the output inventory lot. **Solution:** A waste batch from a conversion relates to the output inventory lot from the conversion.

	Summary of Work	Extended Description of Solution Implemented
	Conversions/Add: waste created for 'qty_waste_total' for each item converted if multiple inputs	**Issue:** Upon completing a conversion with waste associated, the waste item created is multiplied by the number of inputs when it should be related to the output. **Solution:** Waste created through a conversion is associated with the output lot. Upon entering a waste value when performing a conversion, a destruction record and associated waste inventory lot are created automatically.
	Conversions/Report: 500 error upon loading page	**Issue:** The Conversions Report returns a 500 error upon loading. **Solution:** The Conversions Report loads correctly.
DATA UPLOADS	**Data Uploads/Report:** 500 error upon loading page	**Issue:** The Data Uploads Report returns a 500 error upon loading. **Solution:** The Data Uploads Report loads correctly.
DESTRUCTIONS	**Destructions/Add/Edit:** remove "actual date of destruction" field	**Update:** The actual date of destruction is captured based on the workflow rather than entered by the end user.
	Destructions/Add: 'daily waste' workflow	**Workflow Gap:** Users do not have the ability to enter "Daily Waste" associated with a particular area at the facility. **Improved Workflow:** Users have the ability to create a destruction record with a source of "Daily Plant Waste" and a reason of "daily waste".
	Destructions/Add: behavior is incorrect	**Issue:** The weight of waste inventory lots created is not being incremented properly. **Solution:** Waste workflows have been adjusted so that waste inventory weights are now incremented properly.
	Destructions/Dispose Item: creating inventory with negative quantity	**Issue:** Waste packages are being presented with "0" inventory, so when they are disposed of the quantity becomes negative. **Solution:** Waste packages created represent the correct quantity, so when they are disposed of they are decremented to zero.
	Destructions/Edit: disable "modify" ability (and remove link) once inventory has been disposed	**Issue:** Destruction records that have been disposed of can be modified. **Solution:** Users can no longer modify a destruction record that has been disposed of.
	Destructions/Inventory: waste creation workflow	**Update:** The workflows regarding waste creation for inventory are being reworked to align with the harvest workflows.
GENERAL	**General/Numeric Standardization:** integer, decimal, varchar limits not validated upon input; validate weight-based calls, decimal(14,2)	**Update:** Numeric standardization is occurring throughout the system, which will provide consistencies with decimal values entered. With the exception of lab results, all decimal values will be saved to two places past the decimal. Lab Results will be saved to three places past the decimal.

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	General: ability to correct mistakes	**Issue:** Licensee must be able to correct mistakes for all data entered into Leaf. **Solution:** All records can be updated per the documented procedures in the user manual.
INVENTORIES	**Inventories/Inventory Types:** add 'type-ahead' search field	**Update:** Traditional drop-down menus for Inventory and Inventory Types are being replaced with "type-ahead" search drop-down menu fields.
	Inventories/Labels: include potency profile from lab results on label	**Update:** Labels are being updated to include potency profiles of inventory.
	Inventories/Move Inventory To Plants: ability to move plants into an existing batch	**Update:** For the "move inventory to plants" workflow, users will have the option to either create a new batch or add plants to an existing batch.
	Inventories/Report: 500 error upon loading page	**Issue:** The Inventory Report returns a 500 error upon loading. **Solution:** The Inventory Report now load properly.
	Inventories: 'type'='waste' should be restricted from all actions except 'area' modification	**Update:** Waste inventory will have restrictions applied to the actions that can be performed to it.
INVENTORY ADJUSTMENTS	**Inventory Adjustments/Listing:** inventory transfers are shown	**Issue:** The Inventory Adjustments report shows all actions related to inventory. **Solution:** Only Inventory Adjustment records are shown on the Inventory Adjustments report.
INVENTORY TRANSFERS	**Inventory Transfers/Add:** add ability to track 'origin'/'propagation source' of plant from sender to receiver	**Update:** As packaged plants are transferred from one facility to another, they maintain their original "propagation source" value.
	Inventory Transfers/Receive: inventory type ID is not created automatically	**Issue:** Upon receipt of inventory, the system is not accurately creating a correctly associated inventory type. **Solution:** Upon receipt of inventory, the receiving facility will have an appropriate inventory type automatically created by the system.
	Inventory Transfers/Update: modifying price on inventory transfer adds additional sale record	**Issue:** When an inventory transfer is modified and the price of a line item changes, an additional sale record is created. **Solution:** Additional sale records will not be created when a transfer is updated.
INVENTORY TYPES	**Inventory Types/Add:** ability to capture 'servings_per_unit' for discrete items	**Update:** Users are able to capture "Servings per Unit" for inventory types.

	Summary of Work	Extended Description of Solution Implemented
	Inventory Types/Add: ability to capture/print 'Weight Per Unit (gm)' for weight-based items	**Update:** Users are able to capture "Weight Per Unit (gm)" for inventory types.
	Inventory Types/Add: only allow integer inputs for 'uom'='ea'	**Update:** When an inventory type with a unit of measure "ea" is created, all associated inventory will only be able to have quantity values that are integers, not decimals.
LAB RESULTS	**Lab Results/View:** cannabinoid potency and THC calculation	**Update:** The calculations for Total THC are being corrected.
	Lab Results/View: extraction capable inventory	**Update:** Lab results validation will now trigger inventory to have a designation called "eligible for extraction", which will be deemed true or false based on lab results entered.
	Lab Results/View: all QA testing	**Update:** Lab results thresholds and behavior are being addressed in a series of tickets dedicated to lab result workflows and validation.
	Lab Results/Listing: calculate and implement 'high THC' and 'high CBD' product designations	**Update:** 'High THC' and 'High CBD' designations will be calculated based on lab result values and assigned in Leaf, if applicable.
	Lab Results/Retest Workflow: 'Eligible for Retest' status	**Update:** Lab results validation will now trigger inventory to have a designation called "eligible for retest", which will be deemed true or false based on previous lab results entered.
LABELS	**Labels/View/Print:** for 'lot labels', add 'qty' (in grams) and testing lab 'licensee name' [Producer Licensee Users]	**Update:** For inventory labels, additional information regarding testing lab and inventory lot quantity will now be displayed.
	Labels/View/Print: missing 'Washington State' reference	**Issue:** For inventory labels, the "Washington" State reference is missing from the warning that states "This product may be unlawful outside of the State of _____". **Solution:** The label message has been corrected.
	Labels/View/Print: potency analysis (lab results) should be visible	**Update:** Potency analysis will appear on labels.
PLANTS	**Plants/Move Plants To Inventory:** limit ability to move plants of differing strains simultaneously	**Issue:** For the "move plants to inventory" function which packages plants for transfer, plants of different strains should not be packaged together.
SALES	**Sales/Adjustment:** ability to capture 'adjustment_date'	**Update:** Users can update sales records.

Summary of Work	Extended Description of Solution Implemented
Sales/Report: 500 error upon navigation to page	**Issue:** Navigating to the Sales Report produces a 500 error. **Solution:** Sales Report loads properly.