JOB AID: UNDERSTANDING SEED TO SALE TRACEABILITY

USE CASE SCENARIO--PRODUCT RECALL

As a State User, I need a report/reports run for the following scenario:

A member of the public has brought to our attention that product he/she purchased may be harmful to the public. We tested that product and it shows up as having illicit pesticides in it. The Inventory Lot global ID is WAJ412074.IN6EIWB.

We need to first see all locations that received this product and how much is left at each location. We need to trace back and get a lineage of all marijuana at each stage (list of all individual inventory lot global IDs not batch IDs) in the workflow process from plants to this specific end product that were used to make this end product. At each step in the process, we need associated data points that go with those numbers such as:

- Licensee facility location of all products at each step
- Global ID of each item (not the batch global ID, but the specific inventory lot/plant global IDs)
- Categories and subcategories
- Inventory name
- Original quantities created
- Current remaining quantity
- Current area (room)
- Creation date/time stamps
- Other child derivative products created from each of the above products used to make the end product in question

NOTE: *The data requested, and lineage, should not be limited to the licensee in question but rather look across all licensees that may have bought, converted, or sold product in the life cycle of any of the original plants harvested and used to make any portion of the end product.*
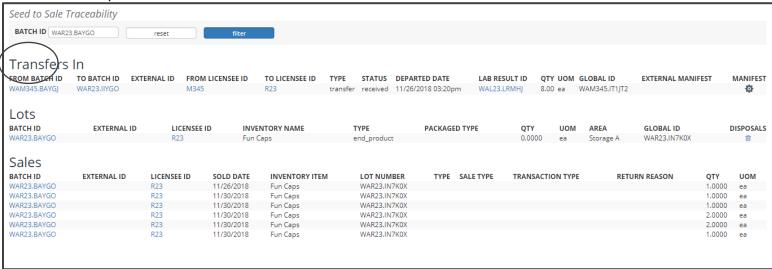
Once it has been tracked back to all the original plants harvested and used to make that product, we will need to go forward in time and see what other products were made from those plants, again using the data points above each step along the way.

We will need to have inventory transfer global ID numbers for any time any of these products were transferred, as well.
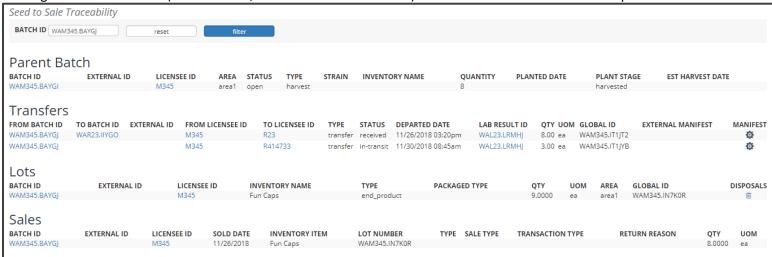
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Steps to retrieve the data requested:

1. Navigate to 'Reports'→'Inventory Lots Report'.
2. Enter the global ID of the inventory lot into the 'global ID' filter and click the 'filter' button.
3. Retrieve the batch global ID from the record that appears and copy the global ID number.
4. Navigate to 'Reports'→'Seed to Sale Traceability Report'.
5. Enter the batch global ID (retrieved during step 3) into the 'batch ID' field at the top of the page.
6. Results will show you the transfer into the retailer and all the individual sales of that lot.

Seed to Sale Traceability

BATCH ID WAR23.BAYGO   reset   filter

Transfers In

FROM BATCH ID	TO BATCH ID	EXTERNAL ID	FROM LICENSEE ID	TO LICENSEE ID	TYPE	STATUS	DEPARTED DATE	LAB RESULT ID	QTY	UOM	GLOBAL ID	EXTERNAL MANIFEST	MANIFEST
WAM345.BAYGJ	WAR23.IIYGO	M345		R23	transfer	received	11/26/2018 03:20pm	WAL23.LRMHJ	8.00	ea	WAM345.IT1JT2		⚙

Lots

BATCH ID	EXTERNAL ID	LICENSEE ID	INVENTORY NAME	TYPE	PACKAGED TYPE	QTY	UOM	AREA	GLOBAL ID	DISPOSALS
WAR23.BAYGO		R23	Fun Caps	end_product		0.0000	ea	Storage A	WAR23.IN7K0X	🗑

Sales

BATCH ID	EXTERNAL ID	LICENSEE ID	SOLD DATE	INVENTORY ITEM	LOT NUMBER	TYPE	SALE TYPE	TRANSACTION TYPE	RETURN REASON	QTY	UOM
WAR23.BAYGO		R23	11/26/2018	Fun Caps	WAR23.IN7K0X					1.0000	ea
WAR23.BAYGO		R23	11/30/2018	Fun Caps	WAR23.IN7K0X					1.0000	ea
WAR23.BAYGO		R23	11/30/2018	Fun Caps	WAR23.IN7K0X					1.0000	ea
WAR23.BAYGO		R23	11/30/2018	Fun Caps	WAR23.IN7K0X					2.0000	ea
WAR23.BAYGO		R23	11/30/2018	Fun Caps	WAR23.IN7K0X					2.0000	ea
WAR23.BAYGO		R23	11/30/2018	Fun Caps	WAR23.IN7K0X					1.0000	ea

7. Clicking the 'from batch ID' (circled above, in the Transfers In section) will re-filter for the data from the processor.

Seed to Sale Traceability

BATCH ID [WAM345.BAYGJ]   [reset]   [filter]

Parent Batch

BATCH ID	EXTERNAL ID	LICENSEE ID	AREA	STATUS	TYPE	STRAIN	INVENTORY NAME	QUANTITY	PLANTED DATE	PLANT STAGE	EST HARVEST DATE
WAM345.BAYGI		M345	area1	open	harvest			8		harvested	

Transfers

FROM BATCH ID	TO BATCH ID	EXTERNAL ID	FROM LICENSEE ID	TO LICENSEE ID	TYPE	STATUS	DEPARTED DATE	LAB RESULT ID	QTY	UOM	GLOBAL ID	EXTERNAL MANIFEST	MANIFEST
WAM345.BAYGJ	WAR23.IIYGO		M345	R23	transfer	received	11/26/2018 03:20pm	WAL23.LRMHJ	8.00	ea	WAM345.IT1JT2		⚙
WAM345.BAYGJ			M345	R414733	transfer	in-transit	11/30/2018 08:45am	WAL23.LRMHJ	3.00	ea	WAM345.IT1JYB		⚙

Lots

BATCH ID	EXTERNAL ID	LICENSEE ID	INVENTORY NAME	TYPE	PACKAGED TYPE	QTY	UOM	AREA	GLOBAL ID	DISPOSALS
WAM345.BAYGJ		M345	Fun Caps	end_product		9.0000	ea	area1	WAM345.IN7K0R	🗑

Sales

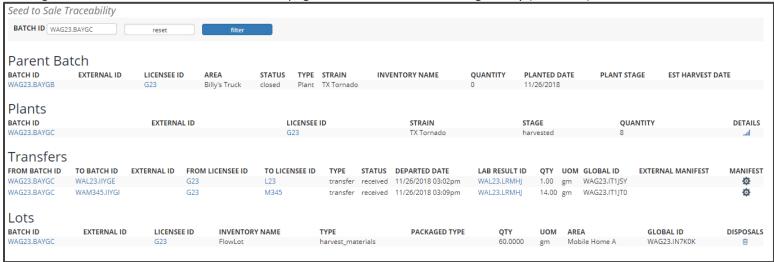| BATCH ID	EXTERNAL ID	LICENSEE ID	SOLD DATE	INVENTORY ITEM	LOT NUMBER	TYPE	SALE TYPE	TRANSACTION TYPE	RETURN REASON	QTY	UOM
WAM345.BAYGJ		M345	11/26/2018	Fun Caps	WAM345.IN7K0R					8.0000	ea

8. Using the links on this page, you can see all transfers and the associated manifests for each, associated lab results for each lot, and any sales of this product.
9. Clicking the "from batch ID" will re-filter for data from the harvest lot.

Seed to Sale Traceability

BATCH ID [WAM345.BAYGI]   [reset]   [filter]

Transfers In

FROM BATCH ID	TO BATCH ID	EXTERNAL ID	FROM LICENSEE ID	TO LICENSEE ID	TYPE	STATUS	DEPARTED DATE	LAB RESULT ID	QTY	UOM	GLOBAL ID	EXTERNAL MANIFEST	MANIFEST
WAG23.BAYGC	WAM345.IIYGI		G23	M345	transfer	received	11/26/2018 03:09pm	WAL23.LRMHJ	14.00	gm	WAG23.IT1JT0		⚙

Lots

BATCH ID	EXTERNAL ID	LICENSEE ID	INVENTORY NAME	TYPE	PACKAGED TYPE	QTY	UOM	AREA	GLOBAL ID	DISPOSALS
WAM345.BAYGI		M345	FlowLot	harvest_materials		12.0000	gm	area1	WAM345.IN7K0Q	🗑

10. The 'Transfers In' section shows which facility the product came from (Producer).
11. You can use the links to see the Lab results associated, the transfer manifest and the associated inventory lots.

12. Clicking the 'from batch ID' link will re-filter the page with data from the sending facility (Producer).

13. You can see all the facilities this batch was sent to, all the plants in the batch (and additional details available at the link), and all products that came from the batch in the lots section.

14. For any plant-type batch, further details about the batch (such as mother plant ID) can be retrieved by navigating to the 'Batches' Report ('Reports'→'Batches), filtering the report by the global ID of the plant batch, and then clicking the 'details' to see the mother plant ID.
NOTE: 'mother plant global ID' is not a required field for Leaf Data Systems users until 1.40.0, so this data field is not always captured in 1.35.6 and 1.37.5.

SQL:

```
/* get all transfer in batches */
SELECT batches.global_id
FROM inventory_transfer_items INNER JOIN batches ON batches.id = inventory_transfer_items.received_batch_id
WHERE batches.global_id IN ('WAG029843.BA2U');

SELECT batches.global_id
FROM inventory_transfer_items INNER JOIN batches ON batches.id = inventory_transfer_items.batch_id
WHERE batches.global_id IN ('WAG029843.BA2U');

/* find all conversion batches and harvest batches */
SELECT combined_batches.parent_batch_id
FROM combined_batches
WHERE child_batch_id = (SELECT id FROM batches WHERE global_id = 'WAG029843.BA2U');

/* once you have a batch, you can find items in a batch: */

/* get all plants in batch */
SELECT areas.name, plants.batch_id, plants.pesticides, batches.qty_harvest
FROM plants INNER JOIN areas ON areas.id = plants.area_id
INNER JOIN batches ON batches.id = plants.batch_id
WHERE batches.global_id IN ('WAG029843.BA2U');

/* get all inventories in batch /
SELECT areas.name, inventories.
FROM inventories INNER JOIN areas ON areas.id = inventories.area_id
INNER JOIN batches ON batches.id = inventories.batch_id
WHERE batches.global_id IN ('WAG029843.BA2U');

/* get all disposals in batch /
SELECT areas.name, disposals.
FROM disposals INNER JOIN areas ON areas.id = disposals.area_id
INNER JOIN batches ON batches.id = disposals.batch_id
WHERE batches.global_id IN ('WAG029843.BA2U');
```